

MULTI-YEAR STRATEGIC PLANNING

Supplementary
Resources for
School Board
Trustees

2017

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Une publication équivalente est disponible en français sous le titre suivant : *Planification stratégique pluriannuelle : Ressources supplémentaires à l’intention des conseillères et conseillers scolaires, 2017.*

This publication is available on the Ministry of Education’s website, at www.ontario.ca/edu.



Multi-Year Strategic Planning

A Guide for School Board Trustees

Supplementary Resource 1

Legal Obligations for Multi-Year Strategic Planning

Excerpts from the two parts of the [Education Act](#) that concern multi-year strategic planning – Part VI, “Boards”, and Part XI, “Supervisory Officers” – are provided below.

Excerpts from the Education Act, Part VI, “Boards”

Duties and Powers

169.1 (1) Every board shall,

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

- (h) monitor and evaluate the performance of the board's director of education, or the supervisory officer acting as the board's director of education, in meeting,
 - (i) his or her duties under this Act or any policy, guideline or regulation made under this Act, including duties under the plan referred to in clause (f), and
 - (ii) any other duties assigned by the board.

Multi-year plan

(2) A multi-year plan is a plan for three or more school years.

School climate surveys

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

Same

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

Measures in plan

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

Communication

- (4) Every board shall take steps to,
- (a) bring the plan referred to in clause (1) (f) to the attention of supporters and employees of the board; and
 - (b) report to supporters and employees of the board about progress in implementing the plan referred to in clause (1) (f).

Effective stewardship

- (5) Every board shall,
- (a) effectively use the resources entrusted to it;
 - (b) use the resources entrusted to it for the purposes of delivering effective and appropriate education; and
 - (c) manage the resources entrusted to it in a manner that upholds public confidence.

Conduct of Members of School Boards

Duties of board members

218.1 A member of a board shall,

- (a) carry out his or her responsibilities in a manner that assists the board in fulfilling its duties under this Act, the regulations and the guidelines issued under this Act, including but not limited to the board's duties under section 169.1;
- (b) attend and participate in meetings of the board, including meetings of board committees of which he or she is a member;
- (c) consult with parents, students and supporters of the board on the board's multi-year plan under clause 169.1 (1) (f);
- (d) bring concerns of parents, students and supporters of the board to the attention of the board;
- (e) uphold the implementation of any board resolution after it is passed by the board;
- (f) entrust the day to day management of the board to its staff through the board's director of education;
- (g) maintain focus on student achievement and well-being; and
- (h) comply with the board's code of conduct.

Duties of Board Chair

Additional duties of chair

218.4 In addition to any other duties under the Act, the chair of a board shall,

- (a) preside over meetings of the board;
- (b) conduct the meetings in accordance with the board's procedures and practices for the conduct of board meetings;
- (c) establish agendas for board meetings, in consultation with the board's director of education or the supervisory officer acting as the board's director of education;
- (d) ensure that members of the board have the information needed for informed discussion of the agenda items;
- (e) act as spokesperson to the public on behalf of the board, unless otherwise determined by the board;
- (f) convey the decisions of the board to the board's director of education or the supervisory officer acting as the board's director of education;
- (g) provide leadership to the board in maintaining the board's focus on the multi-year plan established under section 169.1;
- (h) provide leadership to the board in maintaining the board's focus on the board's mission and vision; and
- (i) assume such other responsibilities as may be specified by the board.

Excerpt from the Education Act, Part XI, “Supervisory Officers”

General report of chief executive officer

283 (3) At the first meeting in December of each year, the chief executive officer of a board shall submit to the board a report in a format approved by the Minister on the action he or she has taken during the preceding 12 months under subsection (2) and a copy of such report shall be submitted to the Minister on or before the 31st day of January next following.

Additional duties of director of education

283.1 (1) In addition to his or her other duties under this Act, the director of education shall,

- (a) annually review with the board the multi-year plan developed under clause 169.1 (1) (f);
- (b) ensure that the multi-year plan developed under clause 169.1 (1) (f) establishes the board’s priorities and identifies specific measures and resources that will be applied in achieving those priorities and in carrying out its duties under this Act, in particular, its responsibility for student achievement as set out in section 169.1;
- (c) implement and monitor the implementation of the multi-year plan developed under clause 169.1 (1) (f);
- (d) report periodically to the board on the implementation of the multi-year plan developed under clause 169.1 (1) (f);
- (e) act as secretary to the board;
- (f) immediately upon discovery bring to the attention of the board any act or omission by the board that in the opinion of the director of education may result in or has resulted in a contravention of this Act or any policy, guideline or regulation made under this Act; and
- (g) if a board does not respond in a satisfactory manner to an act or omission brought to its attention under clause (f), advise the Deputy Minister of the Ministry of the act or omission.



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Supplementary Resource 2

Characteristics of Effective Mission, Vision, and Values Statements

Early in the multi-year strategic planning process, in Phase 1, “Getting Organized”, the strategic planning committee should review the board’s mission, vision, and values statements. If the committee decides that one or more of these statements needs to be revised, it should review the characteristics of effective statements, as outlined in the box below.

Mission Statement	Vision Statement	Values Statement
<ul style="list-style-type: none"> describes the board’s purpose¹ is concise and memorable answers the following questions: <ul style="list-style-type: none"> – What is our board’s ultimate purpose? What does our board do? – Who does our board serve? – Does equity appear prominently in our mission statement? – What makes our board distinctive? – What problem, issue, or need does our board address? 	<ul style="list-style-type: none"> describes the board’s idealized future state is inspiring and ambitious answers the following questions: <ul style="list-style-type: none"> – What does our board want to achieve? – What is our vision of a fully inclusive board? – What would our ideal board look like? – What will it be like to learn and work in our board? 	<ul style="list-style-type: none"> describes what’s important to the board is a short summary of the core beliefs answers the following questions: <ul style="list-style-type: none"> – What are our board’s essential and enduring beliefs? – What are the priorities that influence our board’s decisions? – Are there particular ministry or community priorities that define us?

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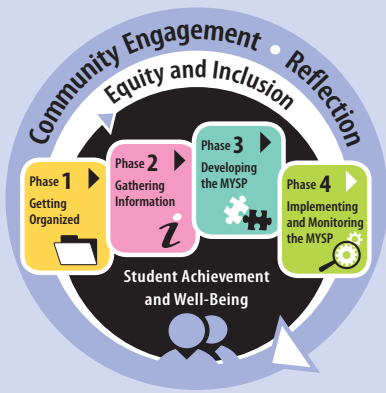
1. The mission statement of an Ontario school board should reflect the purpose of education, which is “to provide students with the opportunity to realize their potential and develop into highly skilled, knowledgeable, caring citizens who contribute to their society.” (Student Achievement and School Board Governance Act, 2009, c.25)

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Mission Statement	Vision Statement	Values Statement
<p>Example:</p> <p>“To prepare students, within a safe, inclusive, and dynamic environment, to face a changing world as lifelong learners and informed, responsible citizens.”</p>	<p>Example:</p> <p>“All students of the board will reach their potential through high-quality programs delivered by highly trained, caring staff in an atmosphere of respect for the individual needs of each learner.”</p>	<p>Example:</p> <p>“We value:</p> <ul style="list-style-type: none">• Equity• Integrity• Collaboration• Respect• Meaningful learning• Family engagement”



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Supplementary Resource 3

Potential Sources of Information for Data Collection

Information gathering is part of the second phase of multi-year strategic planning. Systematically collecting data – a process called environmental scanning – and analysing the data ensures that all decisions are informed by evidence and based on current realities in the board. The two boxes that follow list potential sources of information for strategic planning committees when they scan the internal and external environments of their school boards.

After the internal and external scans have been completed, the committee should not only review all the data but sort it according to demographic groups, geographic areas, and trends in student achievement and well-being. This process can help identify the areas of greatest need.

Internal Environmental Scanning – Potential Sources of Information

- data available through the board’s Student Management System (SMS) and local decision support tools
- Early Development Instrument (EDI) data, Education Quality and Accountability Office (EQAO) results, secondary graduation rates, credit accumulation information, and other student achievement indicators for the previous five-year period
- qualitative measures of student success and achievement, such as goals achieved with respect to self-awareness and self-directed learning, communication, collaboration, and literacy
- student engagement data

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- information on incidents of bullying, including online incidents
- data available through ministry-developed Board Interface Tools, such as:
 - the Student Enrolment Analyser (SEA)
 - the Suspension and Expulsion Tool (SUS/EX)
 - the Postsecondary Education Tool (PSE)
 - the Similar Schools Analyser (SSA)
 - the French as a Second Language Tool (FSL)
 - the Secondary Longitudinal Interactive Course Explorer (SLICE)
- enrolment projections
- results from student, parent, and staff surveys on topics such as school climate, inclusion, well-being, and demographics
- medical and therapy data (*for hospital-based school authorities*)
- information on the use of Parents Reaching Out (PRO) grants
- uptake of parent resources such as *Doing Mathematics with Your Child, Kindergarten to Grade 6: A Parent Guide (2014)*
- staff performance evaluation data and employment practices that support equitable hiring, mentoring, promotion, and succession planning
- reports on the implementation of staff professional development policies and initiatives
- retention and retirement rates, including demographic trends concerning staff turnover
- reports on the outcomes of staff wellness initiatives
- school utilization plans
- reports by board and school councils and committees, such as the Indigenous Education Advisory Council (IEAC), the Special Education Advisory Committee (SEAC), the French Language Advisory Committee (FLAC), and the Parent Involvement Committee (PIC)
- reports on the outcomes of the board's equity and inclusivity strategy, policies, and programs
- Board Leadership Development Strategy (BLDS) reports
- data on enrolment to capacity ratios
- Ministry of Education operational reviews
- financial statements and capital plans
- the policy and profile developed for the recruitment and hiring of a new director of education, and results of the director's recent performance reviews
- the director of education's annual operational plan, board and school improvement plans, and department plans
- progress reports on the current MYSP

External Environmental Scanning – Potential Sources of Information

- federal, provincial, and municipal government data, research, reports, and publications (some specific sources are mentioned below)
- inter-jurisdictional scans
- Statistics Canada data on:
 - population and demographic trends
 - factors affecting Indigenous communities
 - household income and employment rates
 - educational attainment, literacy and numeracy, prevalence and use of technology, health and well-being, disability
- the Truth and Reconciliation report (*Truth and Reconciliation Commission of Canada: Calls to Action* [2015])
- surveys and reports produced by education partners such as parent associations, professional associations, trustee associations, student trustee associations, colleges and federations, and unions
- Canadian and international education research foundations, associations, and journals
- think tanks and research organizations, such as the Conference Board of Canada
- Ministry of Education priorities, directives, research, and publications
- reviews of practices in other Ontario school boards
- information and research compiled by the Ontario Office of Francophone Affairs, and socio-economic profiles commissioned from Statistics Canada by the Ministry of Education (*for French-language boards*)
- information from local Catholic organizations or the local diocese (*for Catholic boards*)
- data from hospitals or treatment centres (*for hospital-based school authorities*)
- research on school enrolment trends
- research on the availability and use of community child care services and early years child and family centres
- data from community organizations, such as those that support marginalized and underserved students and community members
- data from community partners, such as public health units and police services
- data from local business organizations, workforce development boards, local child and youth services organizations, and child and youth planning bodies
- reports on the successes and challenges of coterminous boards





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Supplementary Resource 4

Guidelines for Formal Stakeholder Engagement

Formal stakeholder engagement involves actively seeking the input of the board's communities, is an important aspect of the information-gathering phase of multi-year strategic planning. What follows are some guidelines for this process. The advice is structured in the form of questions that strategic planning committees might ask as they prepare to seek the input of internal and external stakeholders.

Who Should Be Engaged?

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 committee should keep an open mind and be prepared to hear things they may not want to hear. Here are some possibilities for both internal and external stakeholders:

Internal Stakeholders/Partners

- members of the board of trustees
- First Nations trustees, the Indigenous Education Lead, and the Indigenous Education Advisory Council (IEAC)
- student trustees and student councils
- senior administrators
- principals and vice-principals
- teachers and early childhood educators
- support staff
- union representatives
- school councils and student groups (e.g., gay/straight alliances)

- board advisory committees, including the Parent Involvement Committee (PIC), Special Education Advisory Committee (SEAC), equity committee, French Language Advisory Committee, and audit committee

External Stakeholders/Partners

- community groups, such as the following:
 - organizations representing marginalized and under-represented students and families
 - public health units and police services
 - children’s care and hospital organizations (*for hospital-based school authorities*)
 - francophone organizations (*for French-language boards*)
 - diocesan bishops, diocesan staff, and parish communities (*for Catholic boards*)
- Indigenous organizations and communities
- cultural and religious groups
- coterminous boards
- postsecondary institutions
- community health care providers
- social services organizations, including child care providers, and child and family centres
- parents and other residents
- local business leaders and employers
- medical/treatment staff, and the executive director and staff at the school’s partner facility, where appropriate (*for hospital-based school authorities*)
- municipal leaders, including service system managers of local child care and early years initiatives

How Should Stakeholders Be Engaged?

When reaching out to diverse groups of stakeholders, the committee’s approach should be tailored to each group. The choice of approach depends on what type of information is needed and how it will be used. A recommended approach is to solicit the quieter voices that are sometimes difficult to hear in the presence of more vocal individuals or groups. The table on the following page lists some factors to keep in mind.

As mentioned in *Multi-Year Strategic Planning: A Guide for School Board Trustees*, it can be very helpful to collaborate with stakeholders on the engagement process.

Whatever approach is used, it is important that it be accessible to everyone involved. The [Accessibility for Ontarians with Disabilities Act, 2005](#) sets out the standards and reporting requirements that organizations must comply with to ensure that the needs

of persons with disabilities are accommodated. Events and materials must be accessible and accommodations must be offered. Upon request, accommodations must be made available to the best of the board’s ability. The [Ontario government’s accessibility website](#) is a good source of additional information on AODA compliance. Here are some questions to consider:

- Have we asked people to identify any accommodations they require in order to participate?
- Is the space accessible to people with mobility needs? Is the location easy to reach by public transportation?
- Will translators or a sign language interpreter be required at the event? Will closed captioning be needed?
- Are our printed materials/presentations visually accessible? Have best practices and guidelines for accessibility been followed?

Boards should be prepared to receive feedback in a variety of formats – on paper, over the telephone, by email, and in person. Questionnaires and comment cards can be useful when seeking feedback.

Engagement Approach	Considerations
Interviews/conversations	<ul style="list-style-type: none"> • can be a good way to engage high-profile or small stakeholder groups • may be suitable for broaching sensitive topics • may encourage more open and honest dialogue • may require valuable time and resources • may veer away from the broad, overarching goals of the MYSP, towards an individual’s issue(s)
Focus groups	<ul style="list-style-type: none"> • can be informal (e.g., take place during site or classroom visits) or formal (e.g., involve invitations to specific individuals or groups) • can be effective in engaging large stakeholder groups (e.g., children, students, parents, community members, teachers, early childhood educators) and marginalized and under-represented communities • must have equitable representation of all subgroups and sectors within the stakeholder group • may need to be supplemented with surveys or questionnaires to ensure that all voices are heard
Workshops	<ul style="list-style-type: none"> • enable participants to not only contribute ideas but also develop themes among the responses
Town-hall meetings	<ul style="list-style-type: none"> • provide an open and transparent format • provide an opportunity for a large group of stakeholders to give their feedback and input • can be challenging if speakers raise matters outside the scope of the MYSP

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Engagement Approach	Considerations
Surveys/questionnaires	<ul style="list-style-type: none">• provide an opportunity for a large group of respondents to give their feedback and input quickly• can ensure consistency of messaging to different groups or can be designed to deliver targeted questions to different stakeholder groups• must be written in clear and simple language, so that they are accessible to everyone, including newcomers whose first language may not be English or French, and those who are developing literacy or numeracy skills• may contain qualitative information, which can be difficult and time-consuming to analyse• must comply with AODA standards• if used alone, could be considered an impersonal approach to engagement
Social media and collaboration software	<ul style="list-style-type: none">• may make engagement more interactive for some participants• may prevent some stakeholders from participating, especially if they do not feel comfortable with the use of the technology• may not be feasible for boards that do not have reliable broadband Internet access

When Should Stakeholders Be Engaged?

In-person engagement events (interviews, focus groups, town-hall meetings) should be scheduled with due consideration for people’s availability. It may be necessary to schedule multiple sessions, on different days and at different times, to maximize stakeholder participation. One possible strategy is to leverage scheduled meetings attended by stakeholder groups, such as community or committee meetings.

How Long Should the Engagement Process Take?

Depending on the size and complexity of the board’s student population, conducting a stakeholder engagement can take anywhere from a few weeks to several months. This should be kept in mind when the committee is determining its timelines.

The time required for each type of engagement varies. In-person sessions should generally last no longer than two hours. Surveys and questionnaires should be designed to take no more than fifteen minutes to complete; however, organizations should give participants a window of three to four weeks in which to do them.

Who Should Facilitate the Engagement?

Stakeholders themselves should be invited to be a part of the engagement process and help facilitate the discussions. Members of the strategic planning committee can lead the engagement; however, facilitators should be selected according to their individual comfort levels, interpersonal and facilitation skills, and pre-existing relationships with stakeholder groups. Other school board staff or third parties may be used as necessary. External consultants (e.g., credentialed evaluators, independent educational researchers, university-based research groups) can offer valuable advice on the design and facilitation of an engagement process.

What Questions Should Be Asked throughout the Engagement?

When engaging with the stakeholders, the committee should ask them open-ended questions about the board and its direction, such as the following:

- What do you think is the most important role of our board today?
- What matters most to you about public education?
- If you were a candidate running to be board trustee, what ideas would you put forward?
- How can our board best address the needs of all the learners in our schools?
- How can our board best address the needs of the 21st century learner?
- How are we doing:
 - in student achievement?
 - in positively influencing the well-being of students and staff?
 - in ensuring that the young people and adults in our board feel included?
 - in fulfilling our mission, vision, and values statements?
 - in providing supports to our students and parent communities?
 - in providing supports and services to help our school staff achieve their goals?
 - in using our financial resources and capital funds?
 - in managing our human resources?
- What do you value about our board and what are we doing well that we should continue doing?
- What could the board do to improve in both the short term and the long term?
- What do you think are the greatest challenges our board will face in the next five years?
- How can we work with families and community partners?

Other Important Considerations

In addition to reflecting on the factors mentioned above, the committee should think through any barriers to participation that the stakeholders may have. Here are some important considerations:

- What is the historical relationship between the stakeholder group and the board? Are there special issues to be carefully thought through in advance of the engagement process?
- Would it be useful to offer child care on site for the duration of the meeting?
- If refreshments are being served, are there any dietary restrictions to be considered?
- Would it be helpful to offer a quiet space for meditation and reflection?
- What other barriers may exist that would limit participation? How can we remove those barriers?



[Multi-Year Strategic Planning: A Guide for School Board Trustees](#)



Multi-Year Strategic Planning

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Supplementary Resource 5

A Framework for Assessing Strategic Goals

When determining the strategic goals, the committee should focus on goals that are clearly defined and achievable. The goals should be complementary and present a unified vision of the future. Below is a framework for reviewing each strategic goal, based on four key considerations.

Evaluation	Goal #1	Goal #2	Goal #3	Goal #4	Goal #5
<p>Fit:</p> <ul style="list-style-type: none"> Does the goal fit with the legislated requirements for the multi-year plan? Does the goal fit with ministry objectives and priorities? Does the goal align with the mission, vision, and values statements? Does the goal directly address the learning and well-being needs of those who are underserved and/or those not achieving their full potential? Does the goal fit with stakeholder interests? Does the goal fit with the other strategic goals, to present a coherent, unified strategy? Does the goal fit with the mandate of the particular school system, board, or authority (e.g., the Catholic or French-language school system or the hospital-based school authority)? Will the goal ensure equity and support closing achievement gaps? Does the goal advance or support other dependent goals? 					
<p>Investment:</p> <ul style="list-style-type: none"> Are the anticipated outcomes proportional to the investment of money, staff, and time? Does the goal promote cost savings and improved efficiencies? 					

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Evaluation	Goal #1	Goal #2	Goal #3	Goal #4	Goal #5
Risk: <ul style="list-style-type: none">• Does the goal jeopardize stakeholder buy-in to the plan?• Does the goal pose any risk to the quality of education we deliver?• Could the goal be jeopardized by any changes in the internal or external environment and, if so, how might we mitigate these risks?					
Feasibility: <ul style="list-style-type: none">• How can this goal be operationalized through short-term initiatives?• How can this goal be integrated in a holistic way with other board improvement efforts?• Does the goal fit with our competencies and capacities? If not, does it give us an opportunity to grow in other key areas?					



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Supplementary Resource 6

Key Considerations for the Communications Plan

The final, approved MYSP should be communicated to all internal and external stakeholders, to the broader education and child services community, and to the public. Everyone who was directly involved in the plan’s development should receive a copy of it. A strong launch of the MYSP can effectively lay the foundation for success. The table below highlights the key considerations and effective practices involved in launching the MYSP.

Key Considerations	Effective Practices
<p style="text-align: center;">Clear and consistent messaging</p>	<ul style="list-style-type: none"> • Develop clear messaging about the MYSP’s purpose, development, and monitoring. This will enable students, parents, newcomers, and other community members to see themselves reflected in the plan and encourage their engagement. • Be consistent in all communications, and continually refer to the mission, vision, and values statements, and the strategic priorities, to give a coherent picture of the board’s direction. Also explain the strategic goals, including the related targets, and information about when updates on the plan’s performance will be provided.
<p style="text-align: center;">Sharing of the MSYP with all board staff members and partners</p>	<ul style="list-style-type: none"> • Share the MYSP with all board staff members at in-person meetings to help increase understanding and early adoption of the plan. A combination of electronic and paper-based communications can further help to keep staff members in the loop. • Meet with specific staff groups to clarify how the plan will guide their work and related planning processes. This will increase their understanding and support of the MYSP. Staff groups may include the following: principals, teachers, early childhood educators, managers, unions, and school-based partners, such as child care centres and child and family centres.

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Key Considerations	Effective Practices
A multifaceted communications approach	<ul style="list-style-type: none">• Use different methods and formats to communicate the MYSP and help increase understanding of it – for example, in-person meetings and presentations, electronic communications, news releases, written summaries and reports, posters, and signs.
Ongoing formal and informal communication	<ul style="list-style-type: none">• Reiterate the importance of the MYSP in all reports and documents and at presentations, meetings, and workshops.• Refer to the MYSP in board blog posts and newsletters.• Clearly connect board activities with the goals of the MYSP.



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Supplementary Resource 7

Tips on Understanding Detailed Logic Models

In Phase 4 of the MYSP process as described in *Multi-Year Strategic Planning: A Guide for School Board Trustees*, it is recommended that the director of education, in collaboration with senior administrators, develop detailed logic models for each strategic goal. Logic models visually map out the logic of how resources will be used in order to achieve the desired strategic goals. They show how success will be measured, and thus lay the foundation for a well-designed, well-implemented course of action that directors can monitor and report on.

The following pages provide an overview of what detailed logic models are and how they work. Note that the high-level logic model of the MYSP that the committee creates in Phase 3 is not detailed; however, it is helpful for all trustees to have an understanding of detailed logic models. Logic models have specific terms associated with them, and these terms are defined in the guide when they are first used.

Start with Outcomes

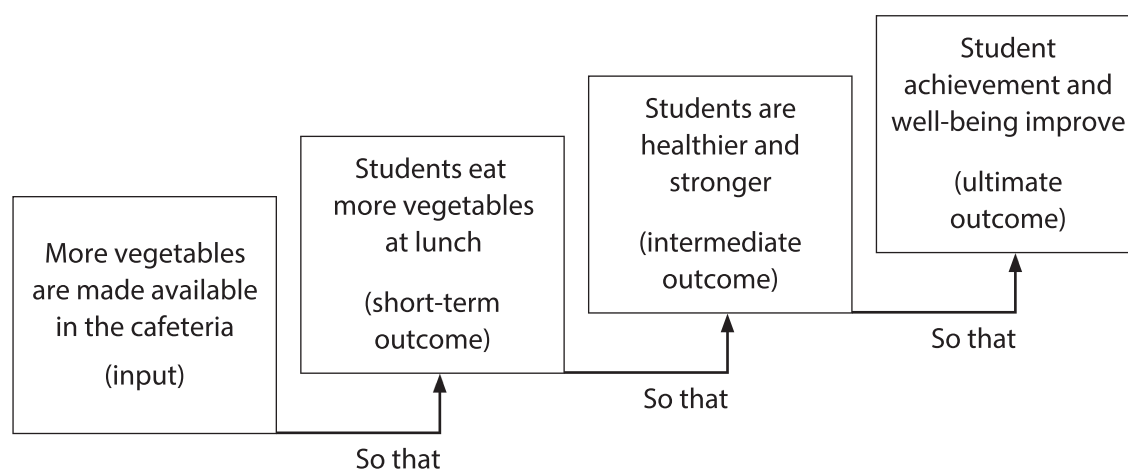
When developing logic models, backwards planning – starting with the end in mind – is essential. The first step is to identify the desired outcomes, and the next is to plan how those outcomes will be achieved and measured.

Focusing on outcomes ensures that boards are making the changes that will bring success. By identifying the desired outcomes, and by tracking progress towards these outcomes, boards can assess whether an initiative was effective and whether investments in it were worthwhile and efficient. The systems created to monitor implementation and measure key outcomes will help to continually improve initiatives.

Consider *How* and *Why* Change Will Happen

When directors develop logic models for each strategic goal, they should think about an initiative's **theory of change** – the assumptions about *how* and *why* an initiative will have the desired outcome.

In the graphic below, the “so that” progression reflects a step-by-step approach to articulating a theory of change for a healthy-eating initiative based on providing more vegetables in the student cafeteria (an input) in order to improve student achievement and well-being (the ultimate outcome).



Know the Difference Between Outputs and Outcomes

When designing detailed logic models, directors should clearly distinguish between **outputs** and **outcomes**. While outputs are the measurable results indicating that the initiative took place, outcomes are the changes that occurred because of the initiative. The box below illustrates the difference and also suggests what questions should be asked when evaluating outputs and outcomes.

OUTPUTS

How much was done?

- number of reports produced
- number of students who participated

Was the initiative done efficiently?

- cost per student
- percentage of responses

OUTCOMES

What was the impact?

- number of people changing their behaviour
- number of students better off

Was the initiative effective?

- percentage of people changing their behaviour
- percentage of students better off

Decide *What* and *How* to Measure

Performance measures are a key part of more detailed logic models. They make progress (or the lack of it) visible. While it is possible to develop ways of measuring every conceivable or desirable outcome of an initiative, the process of tracking and reporting all possible indicators would be cumbersome and not necessarily useful. The director should be precise in determining *what* needs to be measured and reported on. It is recommended that performance measures be used in cases where **the work of tracking and reporting on the data is proportional to the value of the result in informing decision making.**

Deciding exactly *how* to measure progress on the selected outcomes is also key. Here are some important considerations:

- Select performance measures that provide **valid and reliable results** on progress towards achieving the outcomes.
- Ensure that the performance measures are **easy to understand.**
- Choose measures that are **sensitive** – capable of measuring differences and change over time.

Develop the Performance Measures and Data Collection Tools

How will the director know if progress has been made? Performance measures demonstrate whether the outcomes have been realized. They are the comparative difference in data; they show the effectiveness of each initiative – that is, whether it achieved what it was intended to achieve. To ensure focused and reliable monitoring, the director and senior administrators should make sure every outcome statement specifies multiple methods of assessment, with clearly identified performance measures.

It can save time and resources to leverage **data collection tools** already in use; however, the director may decide that it is necessary to develop new tools and structures for collecting data, which can also be used at the operational level. Some quantitative tools include Education Quality and Accountability Office (EQAO) scores, credit accumulation information, and pass rates. When it comes to the less measurable, more subjective aspects of student learning, development, and well-being, qualitative data collection tools, such as surveys, online community boards, focus groups, or interviews, can be developed. See pages 7–8 for a list of suggested data collection tools.

Once performance measures and data collection tools are developed, they should be used to identify a baseline and set targets.

Identify a Baseline and Set Targets

The baseline is the starting point for measurement. It reflects the current status of a goal and is based on the performance measures and the data collected. Ideally, the baseline is determined prior to the implementation of an initiative. However, it may be simply a measure from a set span of time (e.g., 2007–08), against which all subsequent measures can be compared.

With the baseline in mind, the director and senior administrators work together to establish targets. Because targets have a time frame, they provide motivation to achieve the goals. For the MYSP logic model that the committee creates in Phase 3, each goal should have one or two related targets. For the detailed logic models that the director develops for each strategic goal in Phase 4, specific initiatives should have specific targets. All targets should be a stretch but reachable.

In the event that an initiative has reached its target, or is performing better than comparable initiatives, the target should be re-examined and a new target set, one that will continue to motivate the board and drive progress.

Name Champions and Develop Reporting Structures

It is important for the director to name the individual(s) who will hold responsibility for each initiative and to identify *how* and *how often* progress on each initiative will be reported to the director and to the board of trustees. Having these structures in place eases the flow of information and ensures that each initiative is monitored, tracked, and reported on. It also helps to ensure that all decision making is based on evidence. Note that when the committee creates the high-level logic model in Phase 3, the reporting structures should be based on the type and frequency of reports needed from the director. In Phase 4, when the director creates a detailed logic model for each strategic goal, the reporting structures should be based on the type and frequency of reports needed from the senior administrators.

Assess the Data

With performance measures and data collection tools in place, monitoring becomes simpler and more effective. If performance measurement indicates that the initiative is not achieving the expected outcomes, it may be useful to re-examine the initiative's theory of change before concluding that the initiative is not effective. It may be that the logic underlying the initiative is faulty, or that the initiative is not being implemented as intended.

More specifically, when performance results do not demonstrate progress in the anticipated direction, consider:

- Were the right measures used?
- Is the theory of change flawed?
- Were the inputs and initiatives sufficient in terms of quantity or intensity to yield the expected outputs and outcomes?
- Was the initiative implemented according to plan? Was the logic model followed?
- Is more communication, staff training, or another input needed?
- Did unexpected circumstances influence the implementation and, therefore, the outcomes?

Engage in Evaluative Thinking

Developing logic models for strategic planning and evaluation is just one step; it allows the director to make progress visible. Once performance measures are in place, boards should focus on continuous improvement by embedding evaluative thinking into the annual cycle. Evaluative thinking is the process of placing systematic, intentional, and ongoing attention on the expected results. It is critical thinking that focuses on how results are achieved, what evidence is needed to inform future actions, and how to improve future results.

Evaluative thinking uses performance measurement information to help set agreed-upon performance goals and develop mechanisms for feedback, so that implementation of the plan can be adjusted according to the performance results. Outcomes and targets are regularly revisited to ensure a constant focus on quality and improvement and to enhance the efficiency and effectiveness of the MYSP.

In other words, the practice of performance measurement includes ongoing tracking so that boards can monitor and report on their measures and targets, act on results, and watch for any changes that may occur. Throughout this process, the end goal is always to drive continuous, evidence-based improvements.

When using performance measurement, boards can consider the following:

- Has performance changed over time?
- If so, by how much? In which direction?
- If nothing had been done, would the results have been the same?
- Should more resources have been invested in achieving a particular objective? If so, would new initiatives be needed?
- Can similar results be found elsewhere (e.g., in other jurisdictions, in academic studies)?



Multi-Year Strategic Planning: A Guide for School Board Trustees



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Supplementary Resource 8

Sample Templates for the Director of Education's Regular Reports

The director of education should report to the board of trustees on a semi-annual or quarterly basis on progress towards the strategic priorities and goals outlined in the MYSP. Provided in the following pages are three types of reporting templates designed for this purpose. The templates contain the same elements but are organized differently. Sample content is provided in the third template.

Templates such as these help the director to do the following:

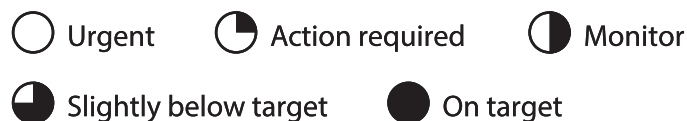
- develop a summary of the status of all the strategic goals
- develop a detailed explanation of why each strategic goal is (or is not) on target
- explain what the administration will do to maintain positive performance (or to address underperformance)

When completing the templates, icons or colours can be used to represent the status of each strategic goal. Here are two possible options:

Shading with traffic light colours:



Filling the circle:



Sample Reporting Template #1

Our Mission	
Our Vision	
Our Values	

Overall Summary of Performance

Strategic Priority	Strategic Goal	Status	Performance Indicator(s)	Next Steps
Priority 1	Goal 1.1			
	Goal 1.2			
	Goal 1.3			
Priority 2	Goal 2.1			
	Goal 2.2			
	Goal 2.3			
Priority 3	Goal 3.1			
	Goal 3.2			
	Goal 3.3			

Additional Information on Strategic Goals

Strategic Goal	Status	Reasons for Success or Underperformance	Action Plan to Maintain Success or to Address Issues
Goal 1.1			
Goal 1.2			
Goal 1.3			

Sample Reporting Template #2

Our Mission	
Our Vision	
Our Values	

Overall Summary of Performance

Reporting Period	Overall Status	Comments
Current		
Previous		

Strategic Priority #1

Strategic Goal	Status	Performance Indicator(s)	Next Steps
Goal 1.1			
Goal 1.2			
Goal 1.3			

Strategic Priority #2

Strategic Goal	Status	Performance Indicator(s)	Next Steps
Goal 2.1			
Goal 2.2			
Goal 2.3			

Strategic Priority #3

Strategic Goal	Status	Performance Indicator(s)	Next Steps
Goal 3.1			
Goal 3.2			
Goal 3.3			

Additional Information on Strategic Goals

Strategic Goal	Status	Reasons for Success or Underperformance	Action Plan to Maintain Success or to Address Issues
Goal 1.1			
Goal 1.2			
Goal 1.3			

Sample Reporting Template #3

Note that sample content is included in this sample template.

Our Mission	We are committed to ensuring that every student reaches their full potential, becomes a lifelong learner, and is a responsible and active citizen of the community.
Our Vision	We will work together with our students to sustain a dynamic culture of excellence, success for all, and responsibility.
Our Values	Collaboration, Fairness, Respect, Responsibility, Openness

Overall Performance Summary: Status of Goals

Reporting Period	Action Required	Monitor	On Target	Overall	Trend
Current	2	2	5	Monitor	→
Previous	3	3	3	Monitor	→

Strategic Priority #1 – Increasing Student Achievement

Strategic Goals

Goal 1.1	Improve the literacy and numeracy skills of Grade 3 students
Goal 1.2	Ensure equitable outcomes for all students by reducing systemic barriers to achievement
Goal 1.3	Use technology to improve learning opportunities in schools

Performance Summary: Status of Goals

Reporting Period	Action Required	Monitor	On Target	Overall	Trend
Current	2	0	1	Monitor	→
Previous	2	0	1	Monitor	→

Status of Each Goal

Goal	Prior Status	Current Status	Trend	Comment
1.1 Improve the literacy and numeracy skills of Grade 3 students	On target	On target	↑	EQAO data shows an average increase of 7% in numeracy scores for Grade 3 students. This is 2 percentage points above the board target of 5%.
1.2 Ensure equitable outcomes for all students by reducing systemic barriers to achievement	Action required	Action required	↓	In literacy, girls continue to outperform boys in both the elementary and secondary panels by an average of 9%. The difference in EQAO performance between Indigenous and non-Indigenous students has narrowed only slightly (0.5 percentage points).
1.3 Use technology to improve learning opportunities in schools	Action required	Action required	↓	The new computer lab has had multiple technical challenges and an issue with an Internet firewall.

Strategic Priority #2 – Fostering a Respectful and Responsible Learning and Working Environment

Strategic Goals

Goal 2.1	Create positive school climates that support student character development and feelings of safety in the classroom
Goal 2.2	Increase staff satisfaction and development opportunities
Goal 2.3	Reduce conflict and increase relationship development among students

Performance Summary: Status of Goals

Reporting Period	Action Required	Monitor	On Target	Overall	Trend
Current	0	1	2	On target	↑
Previous	1	1	1	Monitor	→

Status of Each Goal

Goal	Prior Status	Current Status	Trend	Comment
2.1 Create positive school climates that support student character development and feelings of safety in the classroom	Action required	Monitor	→	The results of the school climate survey show a 5% increase in the number of students who feel safe at school. The board's target is a 12% increase within the next 2 years.
2.2 Increase staff satisfaction and development opportunities	Monitor	On target	↑	The human resources department successfully implemented the new onboarding process and training for new staff. The number of new staff who reported feeling competent in their role within the first 6 months increased by 13%, compared with last year.
2.3 Reduce conflict and increase relationship development among students	On target	On target	↑	The Buddy Bench program has successfully reduced incidents of conflict during playground recess by 13%, compared with last year. Anecdotal reports from teachers indicate that fewer students are playing by themselves and more inter-grade relationships are developing.

Strategic Priority #3 – Using Our Resources Responsibly

Strategic Goals

Goal 3.1	Reduce waste production and energy consumption in our schools
Goal 3.2	Use financial resources and capital funds effectively so that the board stays on budget
Goal 3.3	Ensure that our accommodation review process is transparent and involves community engagement

Performance Summary: Status of Goals

Reporting Period	Action Required	Monitor	On Target	Overall	Trend
Current	0	1	2	On target	↑
Previous	0	2	1	Monitor	→

Status of Each Goal

Goal	Prior Status	Current Status	Trend	Comment
3.1 Reduce waste production and energy consumption in our schools	On target	On target	↑	The most recent results of the waste survey that is performed three times a year show that the average weight of garbage per student per week dropped from 25 kilograms to 22 kilograms.
3.2 Use financial resources and capital funds effectively so that the board stays on budget	Monitor	On target	↑	Our actual budgetary expenditure reflects the forecasted expenditure, and the board is on budget for this quarter.
3.3 Ensure that our accommodation review process is transparent and involves community engagement	Monitor	Monitor	→	Two accommodation reviews are underway; however, stakeholder and community resistance to possible school closures is high.

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