SASKATCHEWAN
School Boards
ASSOCIATION

# School Board Vision, Mission and Planning

## Module 3

Participate in this seminar to learn more about strategies for effective school board planning.  Module 3 workshop and resource materials include these important topics:

- The role of strategic planning as a key governance tool;

- Approaches to effective planning; and,

- Examples of how school boards plan.

STEWARDSHIP  RELATIONSHIP

LEADERSHIP

PROPERTY OF

# Contents

# Introduction

The highest calling of any school board is to ensure that the school division produces economically justifiable, properly chosen, well-targeted results. This can be achieved by determining the school division's current situation in respect to teaching and learning, and thinking about what it should be not only currently, but also in the future.

Yet, the future is illusive, uncertain and affected by many variables over which school boards have little control. These variables are constantly affected by the changes within the school division, the community and the wider area.

In fact, the only constant in the course of time is change. Nevertheless, school boards and their chief executive officers must provide the leadership to reach a desired future state which is in the best educational interests of the students. Having created a picture of what that future might be, they need to develop plans that will take them to that desired future. Good trusteeship is future directed – articulated as a vision and a plan.

This resource is provided to complement the Module 3 workshop for school board members on *School Board Vision, Mission and Planning*.

Determining one's personal future is not an easy activity. We are sometimes asked where we want to be five years or ten years from now, usually in respect to career and lifestyle. The answer requires visioning, a process of thinking about one's personal future.

Determining the future of an organization is neither an easy nor an individual task. It is a complex activity that requires new thinking about the mandate of the organization and the way in which it operates. For school divisions it involves hard work in which school boards work with community members to create and achieve consensus (or vision) of what schooling in their community should be. It involves consensus of the beliefs and values of the school division, identification of the future potential for the school division, and the creation of an action plan that best ensures your success in achieving that future.

Effective leaders live their lives backwards.  They see pictures in their mind's eyes of what the results will look like even before they have started their project, much as an architect draws a blueprint or an engineer builds a model.

Any large organization's change effort is a complex and difficult undertaking. In addition to the essentials, such a change requires persistence, commitment and passion. Successfully changing large organizations is the greatest leadership challenge of this decade.

**Building Board Knowledge**
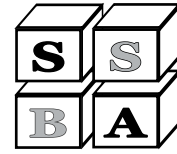
1.  *What are some things you can realistically expect for your school division in the next three years? Ten years?*

2.  *What can you and your board do to prepare for anticipated changes?*

# Effective Organization Planning

Boards of education have the authority, autonomy, and capacity to respond to children's needs. Within this mandate, trustees need to be knowledgeable about what is happening in their schools and need to have a sense of what is needed to provide students with the best educational opportunities possible. They are challenged to do this within a complex world where they do not know all the choices and implications. Therefore, it is important to consider the options and to choose. They need to be able to narrow their focus and direct it to create the desired future of the school division.

Employees in many organizations cannot give a good answer to the simple question, "What is it that your company does?" There is often little identification with the product or service since many employees are asked by management to focus all their attention on performing narrowly defined tasks. While becoming experts at performing the specific tasks they are assigned, they often have little understanding of the greater business picture. Similarities can be drawn with school divisions where there may be a general sense of what schools are about, questions like:

- What will our graduates look like?

- What are the expectations of the students, parents and the community?

- How do our students compare with others elsewhere?

- How well are we doing?

*"Participants in the school system need a sense of direction. People need to know what the organization stands for, where it is headed, and what it is going to take to become better in terms of defined organizational purpose. A meaningful shared organizational purpose binds people together in unity and incorporates them into a common direction. Without clear understanding of the aims of the organization, disparate and fragmented activities result. Progress cannot occur without a common focus on purpose and goals. The board is the body that has responsibility for determining the values upon which the school system rests, and the board must create, with the help of the director and his educational team, a consensus view of what the purpose of schooling in their community must be. Again, vision is the key. The local school board is acting on behalf of the people in its community to translate educational purposes into reality. The board envisions the community's educational future and formulates the goals, defines the outcomes, and sets the course for its public schools"*
*(Poston: p. 29-30).*

Within this area, boards of education have a mandate to make governance decisions and provide direction for the future of the school division. The board of education agenda should be organized to ensure:

- The board has approved procedures to review and renew school system vision, mission and planning;

- The board has adopted the statement of mission for the school division;

- The board has adopted the statement of vision for the school division;

- The board has adopted the statement of principles to guide system policy and operations;

- The board has approved the planning statement of strategic priorities for the work of the school division for the year;

- The board has received relevant reports to monitor progress toward strategic priorities; and,

- The board has established the board agenda and system management plans for the year.

Organizations that are vision-driven perform better over time. Strategic planning presents opportunity. Strategic planning begins with a vision – what will it look like when it is right?

*A vision without a plan is a dream.*
*A task without a vision is drudgery.*
*Where there is no vision – a people perish.*

**Notes**
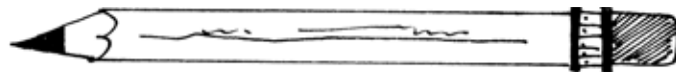
Effective organizations envision the future that they wish to create to carry out their mandate in the most effective way possible. To reach that future requires visioning, planning and change. Yet, there are many considerations when attempting major change. They are:

- Is there wide consensus about the need for change?

- Is the need for change recognized at the top?

- Do leadership actions dramatically demonstrate commitment to change?

- Can there be a perception of immediate success?

- Is there a grand theme for the change to maintain the focus?

- Is information relating to the change widespread, and visibly dispersed?

- Is there a clear description of a possible future that challenges and motivates?

- Is the vision of the future and the plan integrated into the cultural fabric of the organization?

The response to change can take many different forms. Some organizations are reactive to change and take a historical perspective with an emphasis on the effects and a belief that whatever happens is the result of coincidence (luck, fate, change, magic). Other organizations are proactive and have a futuristic perspective with the emphasis on cause – the future is shaped and designed by human intervention. The latter has the foresight to analyze present trends and to extrapolate these into the future. The analysis of this leads to a vision of what is realistically possible and an action plan to get there.

*"If you don't know where you are going, any plan will do."*
*— Peter Drucker*

**Notes**
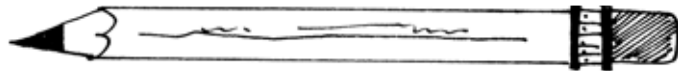
# Urgency for Action: The Crisis Curve

Change takes place over time. The greater the urgency, the less the possibility of change. Anticipatory change that is effected over longer time with appropriate planning and dialogue has the capability of effecting significant change. Reactive change tends to have less strategic capability with the impact for change diminishing in direct proportion to the urgency of response. Crisis change tends to be minimal and short-lived.

A graphic illustration of this concept is given in the chart that follows:
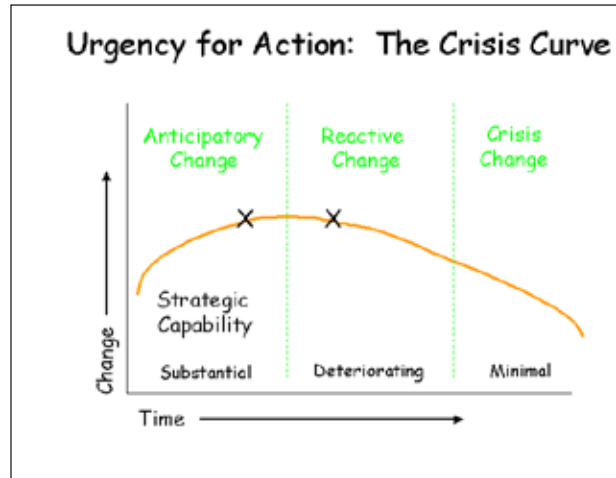


Effective organizations not only have a clear vision of their organization's direction but also believe that it is important. They are sufficiently diligent to assure that daily, operational needs do not take precedence over more strategic, long term and "visionary" activities. They believe that implementing high involvement management concepts typically take a strong visionary leader – or set of leaders – who are capable of describing what the organization could become with enough clarity and direction that people find it a motivating dream, something they can truly aspire toward. They believe that the best way to predict the future is to create it.

Effective organizations focus resources and activities on desired goals in a dynamic process known as strategic planning.  Strategic planning engages trustees, staff members and community in defining goals and ensuring effective and efficient use of available resources.

Similarly, good schools engage all staff and communities in school level goal-setting and program planning.  The philosophy of continuous improvement, shared decision making and annual planning are not be left to chance. The entire community of learners, including all those who work within the schools and their allied partners, must participate in designing the future for the school.

# Strategic Planning

Strategic planning has changed the way in which school divisions work. Historically, the organizational work was divided into two very clear parts: policy and administration.

The boards of education were responsible for setting policy and the director of education and  superintendents were responsible for implementing and administering that policy. The line in the sand between policy and administration no longer exists.

School board members work with support and advice from its administration to set strategic directions together. The board has prime responsibility for setting strategic direction. The administration has the prime responsibility for the development of operational plans to carry out the strategic directions of the school board. Developing strategic direction and operational plans are shared responsibilities.

Strategic planning defines:

- Questions to be answered;

- Problems to be resolved/solved;

- Issues to be defined/directed; and,

- Answers, solutions and directions.

A strategic board develops many plans:

- The leadership plan: Where do we go tomorrow?

- The delegation plan: Who does what?

- The management plan: What gets done today?

- The vigilance plan: Did it happen?

— Mark Light (2001) The Strategic Board

Good planning pays attention to context and changes in the environment. It is important for school boards to examine the opportunities and challenges provided by the changes in society, in the community and in education. Similarly, it is important to examine the factors, both positive and negative, which the school division has so that these can be aligned with the greater environment to bring about improvement.

*The effort to set future direction as a team is strategic planning.*

## Building Board Knowledge

*1. What are the opportunities that changes offer?*

*2. What are the challenges that changes offer?*

*3. What are the organizational assets and opportunities of the school division?*

*4. What are the organizational liabilities and challenges of the school division?*

# Saskatchewan Trends

We live in a time of rapid change. Change in technological, shifting economic patterns, lifestyle changes and social structures mean that the world is changing more rapidly than ever before. We are a part of and participants in that process and we are affected by it. The decisions that we make on an individual, community, provincial and national basis play a large part in shaping the future.

> ***"Most of us can read the handwriting on the wall;***
> ***we just assume it's addressed to someone else."***
>
> *-Ivern Ball*

Education is affected by these changes and education is coming under intense pressure to renew and restructure.  Schools are under stress because the environment is changing too rapidly.

We have a desire to have stability and to know with some degree of certainty what the future will bring tomorrow, next month, next year or in the next decade.

An examination and analysis of demographics and trends in our society and in our province can provide insight and projections of what the future will bring. An understanding of these trends and projections can assist school boards in developing a vision and a strategic plan for the school division they serve.

The times are changing socially, politically, economically, demographically and technologically. These changes affect schools and have profound implications for school divisions.

## *Notes*
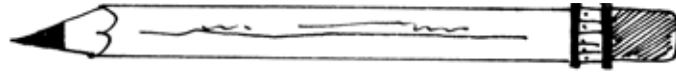
Saskatchewan's urban migration has been gradually increasing while the province's rural population continues to gradually decline. According the *2008 Saskatchewan Education Indicators* report, as this trend continues equity in terms of access to quality services becomes more of a challenge. Although Saskatchewan continues to have the highest percentage of rural residents among western Canadian provinces, the proportion has steadily declined since the 1950s.

The following graphs were adopted from the *2008 Saskatchewan Education Indicators* report with permission from the Ministry of Education.

**Figure 3a:    Rural Population as a Percentage of Total Population, Saskatchewan and Canada, 1956 to 2006**



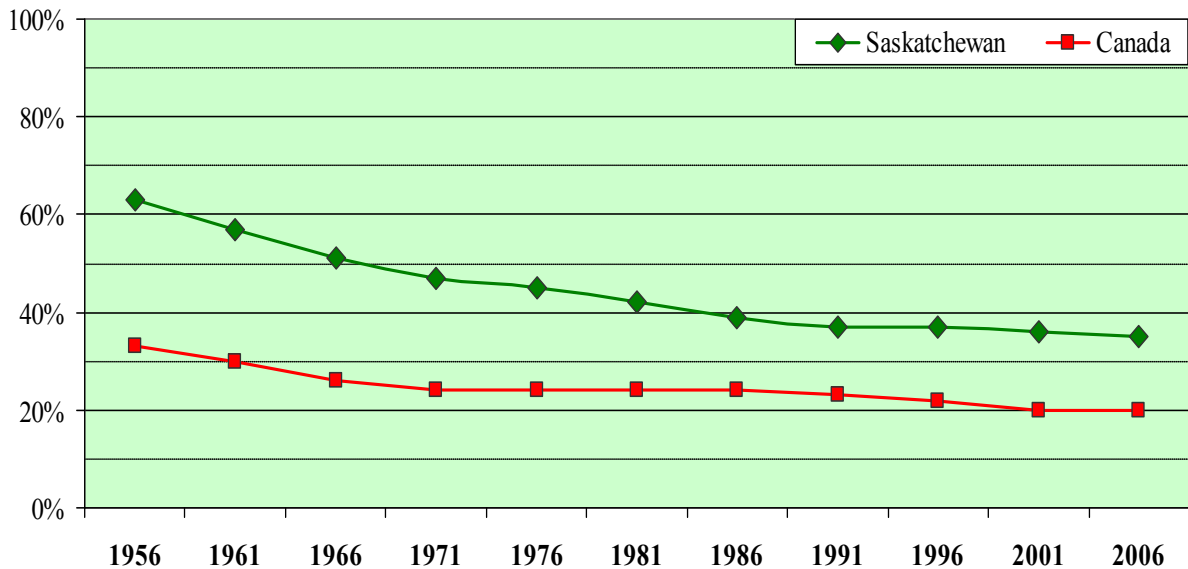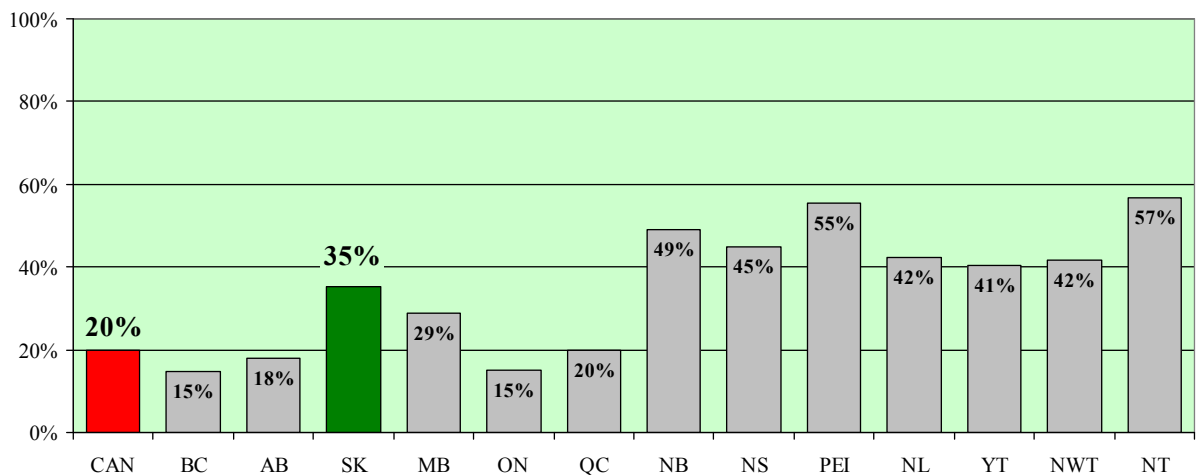**Figure 5b:    Rural Population as a Percentage of Total Population, Canada, Provinces, and Territories, 2006**



Note:    A rural area is defined as having a population below 1,000 and a population density of fewer than 400 people per square kilometre.

Source:    Statistics Canada. (2008). Census Indicator Profile, Canada, provinces and territories, every 5 years. (Table 153-0037 and 109-0300).

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Along with the decrease in rural population in Saskatchewan, the total number of schools in the province has been steadily declining due to urban migration. The greatest decline in schools occurred in rural locations between 1991-92 and 2007-08, according to the *2008 Saskatchewan Education Indicators* report.

The following graphs were adopted from the *2008 Saskatchewan Education Indicators* report with permission from the Ministry of Education.

**Figure 5a:    Number of Saskatchewan Schools, 1991-92 to 2008-09**
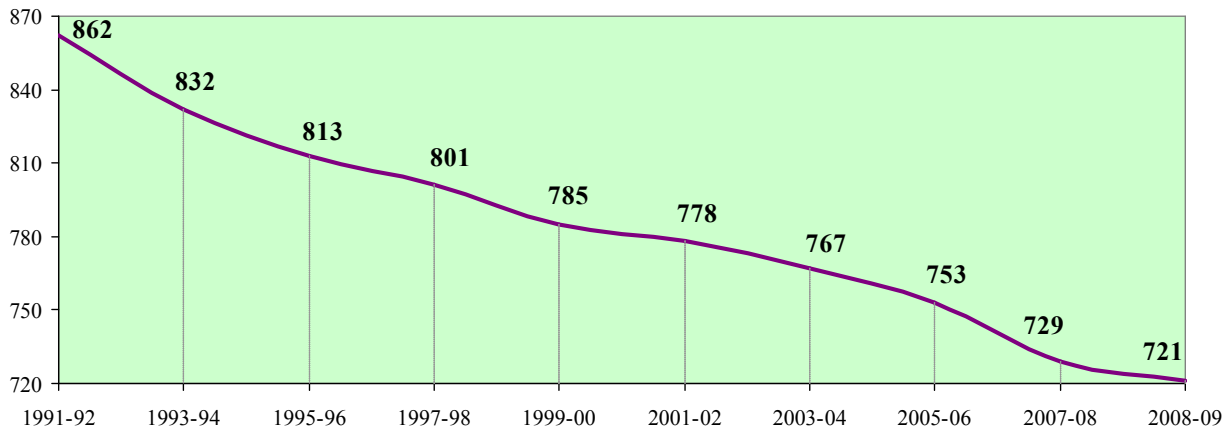


**Figure 26b:    Total Number of Schools, by School Location and School Type, 1991-92 to 2007-08**

| | Location | | | Type | | | |
|---|---|---|---|---|---|---|---|
| | **Rural** | **Urban** | **North** | **Public** | **Separate** | **Conseils scolaires (CEF)** | **Total** |
| **1991-92** | 526 | 303 | 33 | 748 | 114 | - | **862** |
| **1993-94** | 503 | 297 | 32 | 718 | 114 | - | **832** |
| **1995-96** | 486 | 298 | 29 | 693 | 111 | 9 | **813** |
| **1997-98** | 477 | 295 | 29 | 678 | 111 | 12 | **801** |
| **1999-00** | 463 | 294 | 28 | 660 | 113 | 12 | **785** |
| **2001-02** | 449 | 302 | 27 | 648 | 118 | 12 | **778** |
| **2003-04** | 437 | 304 | 26 | 634 | 121 | 12 | **767** |
| **2005-06** | 400 | 328 | 25 | 622 | 119 | 12 | **753** |
| **2007-08** | 374 | 332 | 23 | 597 | 119 | 13 | **729** |

Note:    The classification of a school as urban, rural, or north is determined by school address. If it has a city address (unless it is a Hutterite school, except for Barr Colony which is in Lloydminster), it is assumed that the school serves urban students. Addresses with site numbers are assumed to be rural.

Separate schools include those in Roman Catholic separate school divisions and one Protestant separate school division. The one francophone school division is called the Conseil des écoles fransaskoises (CEF).

Source: Ministry of Education. (2008). Education Finance and Facilities. Regina, SK

For years there has been a decline in the total number of births in Saskatchewan. Minus a few exceptions from 1989 to 2005 there was a year-over-year decline in the total number of births. However, in 2006 and 2007 there was a year-over-year increase. During the same time, Registered Indian births has steadily increased from 1,888 in 1989 to 3,365 in 2007, according the *2008 Saskatchewan Education Indicators* report. As the report indicates, "Birth numbers are useful for forecasting future trends in the education system" (*2008 Saskatchewan Education Indicators*, 2008)

The following graphs were adopted from the *2008 Saskatchewan Education Indicators* report with permission from the Ministry of Education.

**Figure 4a:     Total Birth Numbers, Saskatchewan 1989 to 2007**
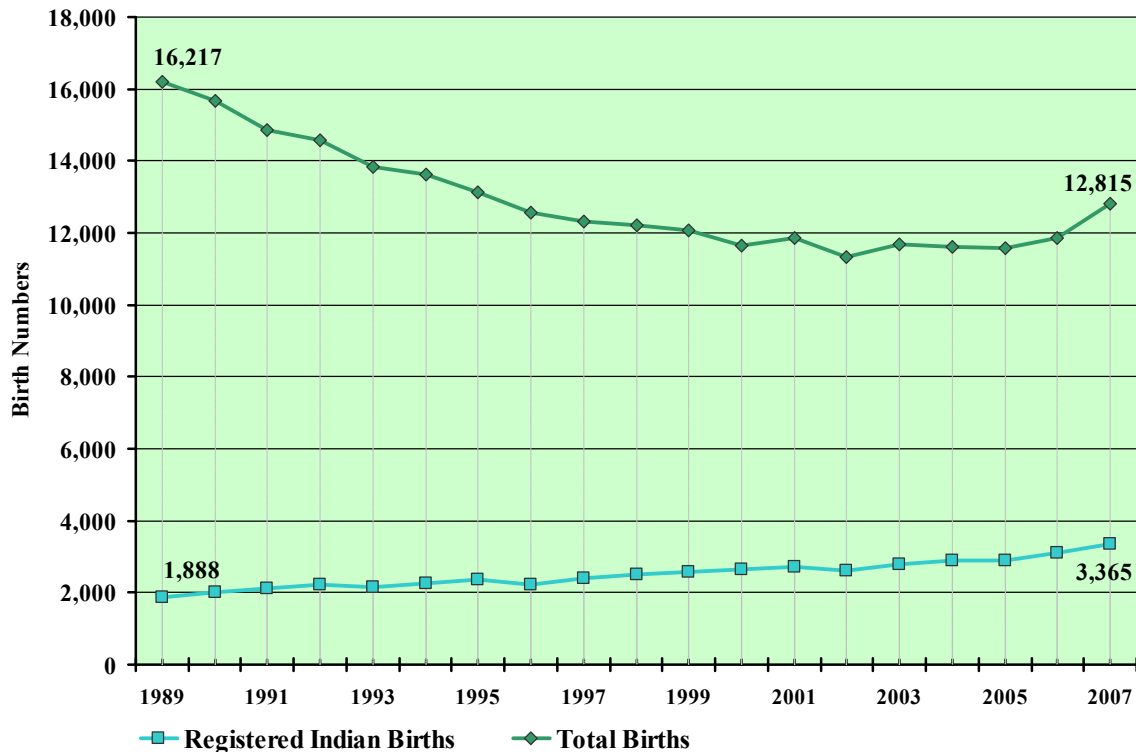


**Figure 6b:     Saskatchewan Births by Location, 1997 to 2007**

| Sub-Population | 1997 | 2002 | 2007 |
|---|---|---|---|
| Rural - Total births | 4,735 | 4,414 | 4,786 |
| - Registered Indian births | 940 | 1,046 | 1,366 |
| Urban - Total births | 6,962 | 6,292 | 7,290 |
| - Registered Indian births | 1,045 | 1,131 | 1,441 |
| North - Total births | 612 | 610 | 739 |
| - Registered Indian births | 424 | 450 | 558 |

Note:     A baby was counted as Registered Indian if either the mother or father self-identified as Registered Indian. "North" includes births in the Keewatin Yathe Health District, Mamawetan Churchill River Health District, and Athabasca Health Authority.   Cities are grouped in the "Urban" category.   All other places, including towns, are grouped in the "Rural" category.

Source:  Ministry of Health. (2008). Health Population Data – Vital Statistics. Regina, SK

# Importance of Planning

A school division's planning is of significant importance to its future. Indeed, the school board is elected to make decisions about the direction of the school division and the priorities that will be established. The board of education has an obligation to think creatively about the future of the school system and a responsibility to shape the face of education in their local communities within the context of a rapidly changing world. The very thinking about the way school divisions operate and what is possible has to be altered. This requires planning.

A strategic board develops a governance or leadership plan to strategically set the direction for the board and school division. Within this context, the board establishes policy and makes decisions. The Director of Education, or Chief Executive Officer, provides leadership but does not develop the mission, vision or values. The Director of Education is responsible for ensuring that an appropriate process is in place to develop the mission, vision and values for the school board.

The choice remains between being active and making things happen or being passive and wondering what has happened.

Effective organizations are focused on the improvement of practice. To do this, they need to develop a scheme for making, doing, or arranging something – a plan which is strategic rather than laissez faire. A strategic plan attempts to answer the following questions:

- Where are we right now?

- Where do we want to be in the future?

- How will we get there?

- What internal and external forces are operating that will hinder or help us to achieve our long term goals?

- How will we know when we are successful?

Each question can be answered through processes that will provide information, insight and direction.

## Where Are We Right Now?

Planned change requires that there is a clear understanding of the starting point. This understanding can be provided through evaluation initiates.

### Orientation to Trusteeship

Trustees must know their roles and responsibilities within the mandate of the school division.

### Board of Trustees Self-Evaluation

Helps determine changes that need to be made for trustees to become a better board.

### Board-Director Appraisal

Provides insight into the effectiveness of the school division management and identifies changes for improvement.

### An Environmental Scan

By which the Board assesses the school division's strengths, weaknesses, opportunities, and challenges identifies the factors impacting on the school division and reveals key areas of required attention.

### Indicators of Effectiveness

Of the school division provides data which identifies how the school division is doing in respect to its mandate.

## Where Are We Going?

While a journey may begin with but a single step, the destination needs to be determined to provide the direction. Specific actions can be undertaken to provide clearer direction.

### Vision Development

That is commonly supported provides focus and direction for all participants in the school division.

### Goal-setting

Establishes targets to be achieved in the short term and in the future.

### Identification of Trends and Issues

Reveals the direction of factors in the province that impact on school divisions and focuses planning within potential eventualities.

**Characteristics of Effective Schools**

Are identified to provide models of school organization and behaviour which school division policy can support and schools can emulate.

**Innovation and Restructuring**

Provides changes that support improvement in the school division's educational program and services.

## How Will We Get There?

As any trip requires various modes of transportation, so too does strategic planning.

**Leadership Development**

Assures that those dealing with issues and policies have a clear understanding of the situation, possess the skills required to communicate the vision, mission and strategic plan to others and demonstrate strong commitment toward achieving the goals.

**Conflict Resolution**

Processes need to be established so that participants in the plan are not alienated by the inevitable tensions and disagreements.

**Building A Learning Community**

Through public education and participation in the strategic plan process creates shared vision and commitment.

**Trustee Code of Ethics**

Identifies how trustees will behave as they provide the leadership in developing and implementing the strategic plan so that apparent conflicts and disagreements do not undermine the plan.

**Enhancing Communication**

Employees, participants in the strategic plan process and the community need to be kept current about the direction of the school division and the progress being made and trustees need to be open to the feedback from these stakeholders.

**Strategic Planning**

Provides clarity of direction and identifies what is being done, when, by whom and how.

**Effective Meetings**

Focus on the strategic plan, monitor its progress and adopt motions that confirm direction and action to a given point in time.

**Policy Leadership**

A shared responsibility in that the Board makes polity decisions in consultation with and with the support of the school division administration and the administration implements the policy in consultation with the Board. The two entities work as a team.

## How Will We Know When We Are Successful?

Evaluation provides data which are indicators of success of various Board and Administration initiatives. It provides information that can be made public to show that there is school division accountability and fiscal responsibility. It identifies the progress being made in the implementation of the strategic plan.

Strategic planning models have common components, some of which have been referred to above. These components can be identified within any school division by determining the answers posed for each component.

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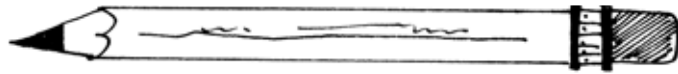
# Components of Strategic Planning Models

Vision, mission and strategic planning are common in effective organizations and an essential directional force in day-to-day work.

## Mission

Mission refers to the mandate of the organization. It identifies the "knitting" of the school division. It is established by the school division's answer to the following:

- Why does our school division exist?

- What is our legislated mandate?

- What is the essence of our function?

- What is our focus?

- What is it that we are to do?

Mission refers to a broad statement describing the unique purpose for which the school system exists and the specific functions it performs. Mission is what the school division is to do. It is what the Board does and where it must focus its collective skills, judgment, energy and resources.

An example of a mission statement is:

- *"The _____ School Division provides a safe and encouraging learning environment to ensure all students obtain relevant knowledge and skills for productive employment and active citizenship."*

It is usually a one sentence, global, "high ground" statement that provides clarity and preciseness. It should permeate all the policy-making and problem-solving initiatives of the board and the staff. It provides unity.

## Vision

Vision is a statement of the conceptualized preferred future of an organization. It answers the question, "Where are we going?" The vision statement is a statement of strategic direction. It is designed to give focus to human energy. It influences everything from specific achievements of the school and the school district to the quality of work life in which the leaders and practitioners of the system will carry out their roles and responsibilities. "A vision looks to the future. It describes a set of ideal characteristics that school boards strive to achieve. These ideals focus on student achievements and the programs or services that maximize student accomplishments." (Guide for School Board Planning and Reporting)

Effective visions are:

- Inspiring;

- Clear and challenging - and about excellence;

- Stable, but constantly challenged;

- Beacons and controls when all else is up for grabs;

- Aimed at empowering own people first, customers second; and,

- Lived in details, not broad strokes.

An example is when a board of education establishes a facility as 'the community learning centre' to signal that this place is more than a traditional school for children.

The process of developing the vision helps solidify board and administration's thinking and their commitment to it.

The importance of this vision cannot be overemphasized. It was commonly developed, commonly shared and provides a clear sense of direction. People, at all levels in the organization, become committed to it.

## Strategic Plan

A Strategic Plan refers to the outline of how things will be done to reach the organization's preferred future. It indicates strategies and action plans for reaching the desired goals. It includes how success is measured and evaluated.

Strategic Planning is both a process and a discipline. The process is the how and the discipline the what. The process and the discipline together yield a strategic plan – a blueprint for action:

- Strategic Planning is an orderly process for envisioning an organization's desired future and determining the required actions to attain that future (California State).

- Strategic Planning is a continuous and systematic process where people make decisions about intended future outcomes, how outcomes are to be accomplished, and how success is measures and evaluated (Blackerby).

- Strategic Planning is a process used for producing change. It yields a product – a strategic plan – which is a blueprint for action. It includes strategies, action plans and time lines, that are published and widely distributed, reviewed regularly and updated annually (Cambridge Management Group).

In the development of strategic plans, the board has major responsibility, and accepts accountability for system achievement. This role is supported by the administration. The board of education engages in this activity in order to make knowledge-based decisions, to effect strategic change, to further the board agenda and to make communication more effective.



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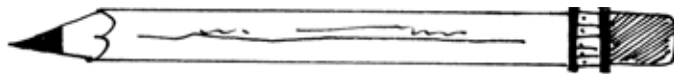
# Impact of Mission and Vision Statements

Vision and mission statements are galvanizing agents of organizational culture. They affect  everyone associated with the organization and, when clearly articulated and communicated, create identification with it. They speak to the community about the fundamental purpose of their work and are the most concise response to the question, "What do you do?"

Visions are not easily articulated. It is critical that the vision of the desired future state be clear, concise, easily understandable, memorable and exciting. This often demands a vision that is so tangible that it can engage the participant's senses. The vision helps create a desire for change by making a possible future more attractive than the realities of the present.

Fundamentally, major transformations are born of visions – visions that ignite the imagination and help others rethink what is possible. This cornerstone of organization transformation can be put in place anywhere, at any level in the management hierarchy. Those who can make the vision of a new and worthwhile future tangible, communicable, motivating and memorable have already begun the process of influencing change.

Vision statements:

- Are written in the first person (i.e., we);

- Are written in the present tense as though already achieved;

- Create excitement and enthusiasm; and,

- Are demanding and challenging yet achievable.

The remainder of this section provides examples of school division vision and mission statements. As you read and ponder these statements determine why you prefer one to the other.

## Examples

Vision Statement:

"The ABC School Division is organized to ensure effective learning opportunities for students to acquire the  knowledge, skills and values necessary to be productive contributors to a changing world within the constraints of the system budget."

Vision Statement:

"The DEF Board of Education is the dynamic learning community of choice. We provide quality learning opportunities and options. Our learners take ownership by discovering and developing their potential, passions, and gifts. They take their place as lifelong learners and make a significant contribution within a complex, changing world."

**GHI School Division**

**Mission Statement:**

To provide a quality education for all children in a caring, cooperative environment which respects individual dignity, fosters self-worth and encourages personal excellence and life-long learning.

<p align="center">The GHI School Division believes:</p>

- that children are our most valued resource and deserve a quality education delivered in a caring environment.
- that the education of students is best served through the cooperative efforts of students, parents, staff, and the community.
- in the dignity and infinite worth of each student.
- in a curriculum which is relevant and responsive to the needs, interests and abilities of the individual.
- the best indicators of our successes are the achievements of our students, the commitment of our employees, and the confidence and trust of the community which we serve.
- in fostering the desire to learn and preparing students for life-long learning.
- in promoting a sense of personal worth as well as respect and concern for others.

**JKL District School Division**

*Our Vision:* Ensuring a future in which all learners achieve their full potential.

*Our Mission:* To educate students to embrace lifelong learning and become contributing citizens in a challenging, constantly changing world.

*Our Values:* Three core values will govern our actions and decisions in ensuring mission  effectiveness and the realization of our vision:
- Respect
- Innovation
- Accountability

*Behaviours:* Our commitment to these values will be demonstrated every day through the following behaviours:

Respect
We will respond to stakeholder needs in a caring, thoughtful and considerate manner.
We will ensure a safe, welcoming and inclusive environment that nurtures personal and professional achievement.
We will communicate with all stakeholders in an open, honest, sensitive and intelligent manner.
We acknowledge the dignity and worth of all individuals and will respect their roles, competencies and contributions to our mission.

Innovation
We will foster an environment that encourages creativity and inspires people to make a difference.
We will recognize and reward excellence, effort and innovation in pursuit of our vision.
We will encourage thoughtful experimentation and challenge routine ways of doing things.
We will be mindful of the need to adapt best practices in enhancing our mission effectiveness.

Accountability
We will act with integrity in accordance with established Board policies.
We will measure and report our accomplishments against explicit, planned outcomes.
We will use our resources wisely, efficiently and effectively.
We will make commitments and deliver on those commitments.

*Intent***:** Over the next three years, we intend to increase our student enrolment by attracting new learners into the Board's varied educational programs.

**MNO District School Division**

Mission and Vision Statement

"The mission of the MNO School Division, in partnership with the community, is to provide students with the knowledge, skills, and qualities required to be successful in a changing, diverse world.

Education in MNO is a shared, life-long experience in which the diverse needs of all individuals are met. This experience, provided in a safe, supportive environment, will ensure success in a changing world.

We Believe . . .
- in a learning environment that fosters respect and security and provides meaningful learning experiences for all individuals.
- clearly defined performance expectations promote success.
- school staff should be leaders and innovators in education and be positive role models.
- quality teaching along with interesting, relevant, and challenging activities will produce optimal learning.
- school programs must be flexible.
- service/programs should be designed to benefit learners.
- all students can learn and reach their potential.
- schools and the community should work together to prepare students to positively contribute to a democratic society and world community.
- learning is a continuum that occurs inside and outside of school and takes many forms.
- each individual should be prepared to respectfully contribute to an increasingly complex, changing, multi-cultural society and workplace."

**PQR School Division**

**Our Vision**

A caring, learning community.

**Our Mission**

The PQR District School Board is a partnership of students, parents, employees and community committed to excellence as a leader in public education.

Our focus is to enable learners to acquire knowledge and develop critical thinking skills and values that allow them to realize their potential and contribute positively to their community.

**Our Belief**

- Students come first.
- Learning occurs best in safe, caring, respectful and welcoming environments.
- By recognizing and supporting the needs of learners, we enable them to reach their potential.
- All learners can develop into contributing citizens who are accountable to themselves and others.
- Effective and comprehensive programs and services enrich the lives of learners
- Highly skilled, caring and motivated individuals serve as positive role models.
- Our employees are an integral part of our success and our future.
- Family and community interaction with the school promotes and enhances student success.
- Communication which is interactive, open and honest builds trust and commitment.
- We build the foundation for our future from our collective experiences.
- Our school system is strengthened by embracing diversity and celebrating creativity.
- Public education is an investment in people and community.

**STU School Division**

**Mission:**
To create a collaborative, supportive, student centred environment, where each student can succeed and all educational partners are respected and valued.

**Motto: "**Working Together for Student Success"

**Vision and Guiding Principles:**
The Board bases all of its actions on four key guiding principles. Supporting the principles are belief statements which create a vision for a child centered school division, which is at the heart of the Board's mission. Taken as a whole, these principles and beliefs will ensure that all students have the right to achieve success in academic, personal and social development within the school.

- Focus on Instruction
- We believe in student-centred instruction.
- We believe in the use of a variety of instructional strategies to address individual learning needs.
- We believe in providing appropriate adaptations to accommodate students with exceptional needs children at the centre of decision-making
- We believe that every school should provide a safe and positive environment.
- We believe in the principle of inclusion where appropriate for student needs.
- We believe in the provision of adequate resources to address the needs of students.
- Treating people with dignity and respect
- We believe that students should be treated with dignity and respect.
- We believe in the principle of fairness. Fairness means giving the student what s/he needs, not necessarily giving everyone exactly the same.
- We believe in promoting the understanding and acceptance of students with exceptional needs throughout the school and community.
- Collaboration and cooperation
- We believe in the principle of collaboration with respect to educational programming.
- We believe that all personnel should have access to appropriate professional development opportunities.

## Building Board Knowledge
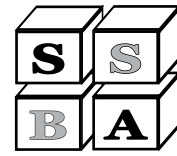
1.  *Think about some part of your own life to which you would like to bring change (i.e. family, job or career). Describe the focus.*

2.  *Describe the timeframe within which you would like to work.*

3.  *Describe what it will look like/feel like when you have made that change.*

4.  *Do a reality check on the vision. What are the hurdles or barriers to change? Personal (internal) hurdles? External hurdles?*

5.  *Pick one hurdle or barrier. List what you can personally do to influence or combat the hurdle or barrier you imagine.*

# Beliefs and Values

A school board needs to adopt a philosophy in order to govern well. As a part of that process of developing the philosophy, the school division needs to clarify its system of values and beliefs. Having a philosophy for a school division or school may be more important to success than the particular skills of the individuals who make up the organization. Future actions are guided first by principles and second by methods. Philosophical decisions must guide us before we can plan solutions to specific problems.

Effective organizations know their purpose. A mission statement affirms why schools exist and what they should be doing. Developing a common sense of mission is a process that permeates all policy-making and decision-making.

Our behaviour is directed by our beliefs. People once believed that the earth was flat and the sun rotated around the earth. Our behaviour reflected these beliefs and it is difficult to break from these beliefs or paradigms.

The Ladder of Inference metaphor provides insight into our actions. Climbing down the ladder helps you discover why you behave the way you do, and thus can help you from jumping to dangerous conclusions.

Helping people form their convictions is the greatest challenge the education system can face – not the teaching of skills or preparing students for work but helping them be prepared to handle the complexities of the modern world. Education provides people with the knowledge, skills and values to be successful in the process of life itself. By its very nature, the education process is never over.

Current research and literature might suggest that at the heart of one's philosophy of education is a set of principles to guide the education and schooling of young adolescents. Since our beliefs guide our actions we must articulate them and act upon them.

Beliefs outline the soul of the organization:

- What do we believe to be essential to leadership behaviour?

- How will we act?

- For what do we stand?

- What is our culture?

- What is our ethos?

- What is the tone of the school division?

- What is the climate of the school division?

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Visionary companies have clearly articulated core values (deeply held beliefs analogous to an individual's philosophy of life) and a mission (a reason for being).

Values articulate how school division trustees and employees must behave to achieve the vision and sustain the mission.

*"As corporate leaders, effective school board members share their clearly defined core values and expectations for the organization. The people who work in schools know what the values are and see them as the foundation of the climate and culture of the system. Broad consensus is pervasive throughout the system on what the focus of the system is, and everything that happens in the system is measured against that focus" (Poston: p.11).*

As beliefs and values are considered and established, school boards and school division participants would do well to reflect on some simple truths:

- Collective vision is more important than individual vision;

- Leadership is about process of developing collective vision;

- Schools only improve with community support;

- By the time you feel it, it is too late;

- Learn by doing;

- A person will learn something new given an opportunity to learn;

- You can't jump a chasm in two small leaps;

- You can attract more bees with honey than with vinegar;

- Reading is fundamental – it is basic to learning;

- Achievement is additive – nothing succeeds like success;

- It takes a whole village just to educate one child;

- Leadership is about doing rather than telling; and,

- Arrogance comes before the fall – keep in touch with stakeholders.

**Building Board Knowledge**

*1. What beliefs and values in your school division do you associate with students?*

*2. What beliefs and values in your school division do you associate with employees?*

*3. What beliefs and values in your school division do you associate with the learning environment?*

# Strategies

## Vision Development

Strategic planning is a way of working and thinking to affect organizational change, anticipate the future, involve partners, collect data, set core leadership values, emphasize proactive leadership and build plans for the long term. It is an activity that is ongoing and cannot be done in a traditional board of education planning day. It is a process that requires knowledge, insight, care and strategies for developing a common vision and for setting system goals.

Research and experience identify the following guidelines for achieving vision.

### Initiate a Learning Process

The strategic planning process requires involvement of school division participants and training about the process itself. It requires clear communication with the participants and the community at large so that there is awareness and opportunity for input into the process. The learning process is ongoing and leaders follow through with commitments and share information freely.

### Re-image Your World

Review the organizational system from the perspective of four new paradigms: world, business, enterprise, and technology.

### Identify Strategic Drivers

What forces for change operate on the school division?

### Re-image Your Organization in a Business Model

Identify desired outcomes and necessary processes to achieve them.

### Establish Principles of Operation

Creating a vision is no quick fix. It is a long, involved process for which there are no shortcuts.. The vision and mission is the writing of a constitution – a frame of reference for everyone.

## Guidelines for Vision Development

Steven Covey, a world renowned organizational specialist and author, prescribes four guidelines for organizations contemplating vision building:

• Both the vision (the end) and values (the means through which you will achieve it) must be based on principles. He defines the basic, inviolate principles of human relationships and human organizations as fairness, equity, justice, integrity, honesty and trust;

• A vision should be timeless. It may change as a result of upheavals in the environment, he acknowledges, but it should be written as if it will never change;

• It should encompass all the organization's stakeholders; and,

• It should address all four needs of the organization and the people in it: their physical and economic well-being, their social need to be treated with respect and dignity, their psychological need to grow and develop, and their spiritual need for meaning and significance.

*Notes*
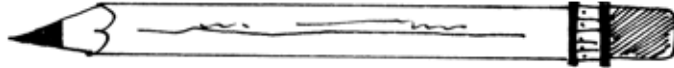
# Steps for Strategic Planning

A logical and systematic approach to strategic planning can lead to desired results. The following planning steps serve as a guideline.

**Step 1: Target Setting**

Target setting relates to scanning the environment for emerging needs, problems, and opportunities. This may involve needs assessments, future forecasts and trend analyses.

**Step 2: Creating Alternatives**

Creation of alternatives is about developing a range of options that address existing and newly identified needs. Creative problem solving processes, exploring other system responses to issues, and systematic gathering of input from the planning partners are means to develop a range of choices.

**Step 3: Estimating  Feasibility**

Estimating the feasibility of options relates to checking options against reality and narrowing the range of choices. The cost of options, the potential benefits associated with options and the public response to certain options are considered. The board of education, staff of the division, community opinion leaders and external experts are seen as potential advisors in the process of estimating feasibility.

**Step 4: Strategy Selection**

Selection of a final strategy and ultimate direction for the division  is a matter of narrowing the range of options. The process is difficult and time consuming but should rely on value-related input already received and relate to the value commitments of the board. The extent to which options advance the division toward attainment of the previously identified targets and align with and support the values of the division are the main criteria for selection and the rationale provided within and outside the system for the final strategy.

**Step 5: Action**

Taking action on the strategy is seen as a means to advance toward the targets previously set. Significant additional detailed planning involving individuals affected is important to successful implementation of the plan.

**Step 6: Review**

Review of plan implementation is an essential means to ensure that the system does not stray from achievement of the targets first set out. Establishing a timetable for review and continuous updating is an important element of assessing progress and providing feedback. Experience suggests establishing a broad review of mission and planning with the public should only occur once every 4-5 years.

Strategic Planning is both a process and a discipline. The process is the how and the discipline the what. The process and the discipline together yield a strategic plan, a blueprint for action. The following chart outlines the processes that might be followed.

**Goal 1:** _____

| What steps will be needed to achieve the change? | Who will lead? | When do you we want to see the change happening? | What indicators are there to show we have been successful? |
|---|---|---|---|
| | | | |
| | | | |
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- Action plans for each action step may be developed.

- Resource requirements including time and dollars should be outlined.

- The board of education should establish reporting expectations for the actions steps for each goal.  What indicator information will assist the board in monitoring progress towards the desired goal?

## Knowledge-Based Strategic Governance

Glenn Tecker of New Jersey based Tecker Consultants has developed a new approach to governance and strategic decision-making known as "knowledge based strategic governance". Knowledge-based strategic governance is a model for non-profit self-governance that uses collaborative dialogue and knowledge-gathering to illuminate issues prior to decision-making. It emphasizes the importance of making knowledgeable decisions, creating a culture of trust, and providing a nimble infrastructure as key components of successful governance, strategy, and organizational systems. It stresses the evolution of successful systems, through changes to process, culture and behaviour, rather than the implementation of structural changes that can upset the very delicately balanced relationship an organization must have with its stakeholders. It focuses on new ways of: governing, sustaining effective relationships, and deriving more enjoyment from participation in organizational leadership.  This innovative process merges governance and strategic thinking by seamlessly integrating Tecker's tools for knowledge-based decision making, Peter Senge's notion of dialogue, crucial elements of John Carver's thinking about the role of governance, and planning strategically over four planning horizons.

## Strategic Focus

Organizational strategic focus or intent is very important. One of the challenges that school divisions face is the fact that there is more to be done for participants and key stakeholders than it has resources to accomplish. The temptation to do every thing can often lead an organization to try to be all things to all people. The result of this approach is not doing anything particularly well. If everything is important — nothing is important. Planning strategically is the counter to the all-things syndrome. It is about identifying a limited number of key strategic activities that the school division must undertake to move successfully into the future.

## Strategic Approach

School divisions provide a wide portfolio of programs and services as reflected in their annual operational plans. The approach in defining the new strategic direction is not to identify what the school division is doing today, but to determine what is not being done today, and must be done in the future to be successful. This strategic direction is not about business as usual — it is about change!

This approach separates the strategic direction and five-year strategic plan from the annual operational plan. The strategic direction is a constant reminder of what must be changed to steer towards the envisioned future.

# Updating the Five-Year Strategic Plan

A strategic plan that covers the 3 to 5 year planning horizon can only stay current and relevant if the governing body insures that the plan is updated on an annual basis. A strategic plan is the leadership team's working document. Therefore, the governing body has both the right and the responsibility to: 1) change the 3 to 5 year strategic plan as needed and 2) update the plan on an annual basis.

## Planning Horizons

Organizations that successfully employ the four planning horizons understand the difference between what should never change, and what should be open to change. They are aware of the difference between what is genuinely sacred to the organization and what is not. This rare ability to manage continuity and change is facilitated by the development and use of the four planning horizons.

### Planning Horizon – 1-2 Years

The 1-2 year planning horizon involves action planning. It is a time for reviewing the annual strategic plan and setting priorities for the next year or two. Program planning continues and an annual operational plan is established. The process involves continuous adjustment to the plan as new knowledge and changes impact on the school division.

### Planning Horizon – 3-5 Years

The 3-5 year planning horizon identifies outcome-oriented goals for that time period. These goals statements represent what constitutes the school division's future success. The achievement of each goal will move the organization toward realization of its vision. All of the goals need to be accomplished if the school division is to fully achieve its vision.

### Planning Horizon – 5-10 Years

The 5-10 year planning horizon makes assumptions about the relevant future. In order to make progress against the 10-30 year envisioned future, an organization must constantly anticipate the strategic factors likely to affect its ability to succeed, and to assess the implications of those factors. This process of building foresight about the future will help the organization to constantly recalibrate its view of the relevant future, a basis upon which to update the strategic plan annually. As the outcome-oriented goals that will form the basis of the long-range strategic plan will be based on this foresight, annual review of these statements will be an appropriate method of determining and ensuring the ongoing relevance of the strategic plan.

**Planning Horizon – 10-30 Years**

A 10-30 year planning horizon consists of a core ideology and an envisioned future. The core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. It consists of two elements - core purpose - the association's reason for being - and core values - essential and enduring principles that guide an association. Envisioned future conveys a concrete yet unrealized vision for the division. It consists of a big audacious goal - a clear and compelling catalyst that serves as a focal point for effort - and a vivid description - vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

This horizon also identifies mega issues—issues of strategic importance, which represent choices the organization will need to make in defining the ultimate direction of its long-range plan. These issues represent potential impediments to achievement of the envisioned future, and form a basis for dialogue about the choices facing the organization. These questions can serve as an ongoing "menu" of strategic issues that, using a knowledge-based approach in gathering insights relative to the school division's strategic position and directional choices for each of the issues, can be used by the Board to create regular opportunities for strategic dialogue about the issues facing education.

## Four Planning Horizons

| Core Ideology<br>Purpose<br>Values | 10 – 30 Years<br><br>Envisioned Future<br>Big Audacious Goal<br>Vivid Description | 5 – 10 Years<br><br>Critical Factors<br>Assumptions About the Future<br>Mega Issues<br>Strategic Principles | 3 – 5 Years<br><br>Strategic Planning<br>Value Proposition<br>Goals Objectives Strategies<br>Organizational Strategy | 1 - 2 Years<br><br>Action Planning<br>Annual Strategic Plan Review<br>↓<br>Priority Setting<br>Program Planning<br>↓<br>Annual Operational Planning |

Tecker's Knowledge-Based Strategic Governance   www.tecker.com

# SWOT Analysis

The SWOT analysis of organizational strengths (S), weaknesses (W), opportunities (O), and threats (T) is at the heart of the strategic planning process:

- **Strengths** are the things the school division does well.

- **Weaknesses** are the things the school division does not do well – yet.

- **Opportunities** are trends in the external environment which could help the organization to achieve desired changes.

- **Threats** are trends in the external environment which hinder the organization from achieving desired changes.

A SWOT analysis is an essential part of an organizational study or audit. It:

- Enables a school division to determine if it is ready for strategic planning;

- Determines the context in which strategic planning takes place;

- Provides data to give insight into the climate of the school division, the expectations of employees and the behaviour of the leadership; and,

- Gives an indication of organizational health and identifies where to begin the change process.

In order to collect the data and to provide feedback, some systematic action research is required. This can take many forms: client surveys; public opinion surveys; consultant studies; employee forums; and, informal data gathering by "wandering around."

The data gathered is analyzed to reveal issues and synthesized to identify emerging themes.

## Building Board Knowledge

*1. Are we prepared to listen to our employees and other s takeholders?*

*2. Are we willing to be influenced by employee and other stakeholders?*

*3. Do we believe in participatory decision-making?*

*4. How confident are we in setting strategic direction based on our organizational audit?*

*5. Are we prepared to take the time to do strategic planning?*

# Vision, Mission, Planning and School^PLUS

The vision of School^PLUS is that:

- All Saskatchewan's children and youth will be well and successful in school and in life;

- School divisions adopt adaptive leadership and use open, consensus-based decision-making to develop policy and action plans;

- Schools support the vision by being centres of learning, support and community for all children, youth and their families; and,

- Families, students, educators and community members actively work together with human service systems to provide what they need to succeed..

In implementing School^PLUS, school divisions align this vision with their mission, future direction and plan. School^PLUS complements the school division plan by providing support, resources and partnerships that can lead to the realization of the vision. It helps school divisions create their conceptualized preferred future that now includes the expanded mandate of schooling. Vision development strategies may change because of changes in school division philosophy and leadership style vis-à-vis School^PLUS.

The mission or mandate of the school division is defined in legislation and is expanded with implementation of School^PLUS.

Strategic planning is the way the school division thinks and works and outlines how things will be done to achieve goals. Integration of the School^PLUS policy and vision, will require change of the strategic plan. School^PLUS advocates knowledge-based strategic governance, a model that promotes collaborative dialogue and knowledge–gathering to guide issues prior to decision-making. This practice is consistent with current educational research. People support what they understand and the things into which they have had input. A system of measurement and accountability, indicators of success in learning and in life, is also determined so that people know when they attain established goals and priorities.

Partnerships and community participation enhance the accuracy of development and provide a consensus view of the educational program in the community and guide the use of resources to achieve success for students and community.

## Building Board Knowledge
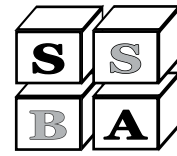
1.  *Are your school divsion and community beliefs and values congruent with School$^{PLUS}$ principles and philosophy?*

2.  *What are the indicators of student success for your school division?*

3.  *What are the indicators of success for your community?*

# Public Participation Strategies

Our social and economic order is in a time of turbulence, which is impacting on school systems in terms of expectations, links to life after school, and the hope for the school system in the nation's economic agenda. Rapid changes impact school divisions and school divisions must be prepared for these changes. However, effective change requires involvement of school division participants and the community.

Board members sometimes feel that they have to come up with a great plan or lead the planning exercise. In practice, the role of the board is to ensure that the school division has a commonly supported strategic plan and the board provides the leadership in its development. Trustees might rely upon system staff for part of the process but organizations are often encouraged to work with outside facilitators for planning.

Typically in major change efforts there is a clear, concise case for change that is widely understood throughout the organization. Often this case is a brief description that clearly depicts why the change is important, what is likely to happen if the change does not occur and in what ways people involved in the change are likely to benefit from it.

Boards of education need to determine who is engaged in the planning process – who is part of the team. If just a few individuals are involved in developing the plan, there may be limited input in the planning process and selling the plan will be a challenge. The entire community of learners, including all those who work within the schools and their allied partners, must participate in designing the future for the school division. Facilitative leadership ensures broad representation of staff and community in the dialogue to establish a plan.

Organizations which have effected successful change through organizational strategic planning discovered that the creation of a high involvement work environment was a key factor in the successful change. People within the school division know that school division changes affect their lives and the lives of the members of the community. They have a vested interest in becoming involved in the planning and implementation process and their knowledge of the organization and its operation can provide important insight into what needs to be done.

Public participation always helps public officials make tough decisions better. Citizens expect opportunities to be meaningfully involved. It's not an option – it's an essential part of governance.

Parent and community input is essential to quality education. While experience and research clearly indicate that some approaches to organizing schooling are more appropriate than others, it is equally clear that almost any practice can be made effective with sufficient public support. Excellence in education and in strategic planning requires strong community involvement and support.

*"Where there is a genuine vision (as opposed to the all-too-familiar "vision statement") people excel and learn, not because they are told to, but because they want to.... The practice of shared vision involves the skills of unearthing shared "pictures of the future" that foster genuine commitment and enrolment rather than compliance."*

Peter Senge. *The Fifth Discipline: The Art and Practice of the Learning Organization* p. 9

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## Building Board Knowledge
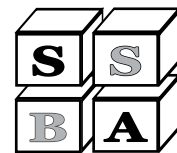
1. *Who will have a role in establishing the plan and making it happen?*

2. *How will community and staff be engaged?*

3. *How does the school system build public support for the plan?*

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# Purposes of Public Participation

The basic purpose of public participation is to provide for a rigorous process through which school division participants and the community participate, in meaningful and effective ways, in developing the school division's strategic plan. This plan is developed based upon the understanding that citizens and groups are the source of tremendous creativity, and that their creativity and input will produce better planning decisions. Public participation recognizes every citizen's right to participate in the process of making local government decisions.

**Objectives of the Public Participation Plan**

- Recognizing that there are many levels of public participation, to provide for an effective mix of participation opportunities that include public information, public education, public input, public interaction and public partnership.

- Recognizing that not everyone participates in the same way or at the same time, to include a mix of participation strategies that provides for a broad and diverse set of participation opportunities that considers the diversity of the community.

- Recognizing the communities' history of public participation, to provide the public with opportunities to review, clarify and update previously generated information, as well as generate new policies, goals, objectives and information.

- To build public support for, and ultimately ownership of, the school division's strategic plan.

**Guiding Principles for the Public Participation Process**

- The school division strategic planning process is grounded in the belief that active and thorough public participation will produce a better, more widely supported strategic plan.

- Public participation strategies will be designed to be sufficiently broad to address the diversity of the population, and to provide the broadest possible representative range of citizens and groups with opportunities for participation.

- Every effort will be made to schedule public participation activities at times and locations that are most convenient for citizens.

# Public Participation Strategies

**Step 1**

This phase of the planning process involves getting ready for the strategic planning process. The focus of all public participation activities during this step will be focused on building public awareness of the strategic planning process including the makeup and role of the leadership committee, the strategic planning process, and the public participation plan.

**Step 2**

Public participation efforts during this step focuses on the review and validation of information that had been collected during previous planning efforts, on developing new information to fill gaps, and on developing planning goals and objectives that relate to a shared vision for the school division. Public participation activities during this step of the planning process will be key in building public support for the plan.

**Step 3**

This step focuses on the review and assessment of alternative plan strategies to best meet the overall vision for the plan along with constituent needs. This step leads to decisions as to which alternative should be drafted into the final plan.

**Step 4**

In this step, the draft of the strategic plan is reviewed. This step also initiates the implementation of the plan.

**Step 5**

As the plan is implemented, it is imperative to monitor and reassess the effectiveness of the strategies that have been put into place. Effective strategies need to be maintained, while the ineffective strategies need to be modified or terminated. A plan amendment process needs to be developed to address issues that develop with the plan, or changes that take place in the community that necessitate change in the documents. Although this is listed as step 5, this step should be ongoing throughout the planning process and used to refine all steps in the planning and public participation process.



- **Public Awareness** - share information
- **Public Education** - provide citizens with balanced and objective information
- **Public Input** - provide citizens with opportunities to inject ideas into the planning process
- **Public Interaction** - exchange views and ideas as a means of reaching agreement
- **Public Partnership** - involve citizens in the decision making process

*Increasing Level of Involvement*

# Accountability

Effective organizations strive to enhance accountability by quantifying achievements. Accountability is showing that you have done what you were required to do in the most efficient and effective way.  Traditionally, education systems have been accountable through a bureaucratic system and the professionalism of teachers. Effective organizations establish processes to assess operations and identify strategies for improvement. School planning, budgeting, assessing, and reporting are integral components of school board planning and school-based decision making.

Strategic planning requires that the board receive reports on the progress of the school division within its mandate and as part of knowing how the school division is doing. The board requests regular reporting on major priorities to identify trends. This information is usually part of the school division's annual report. Furthermore, the board reviews the annual budget to determine the return on investment especially in reference to the goals and objectives of the established priorities.

Many jurisdictions are collecting indicators to respond to the question, "How are we doing?"  Indicators are pieces of information which describe one aspect of the education system.  Establishing a set of indicators provides information to support decision-making, planning, and policy development, and to demonstrate public accountability by providing information about the education system.

Saskatchewan's indicator model includes goals for students (basic, social and personal skills) and system goals (accountability, accessibility, equity, and relevance). School divisions have developed a system indicators report which provides information about educational achievement and the use of resources.

Indicator reports highlight progress, accomplishments and results achieved in the past year as a result of implementing the jurisdiction's education plan. Analyzing and reporting on results achieved are critically important to the accountability cycle.

Measurable outcomes to be achieved answer the question, "What will this look like when we get to where we want to be?" Performance measures indicate what data will be collected to assess and report on achievement of results. They are limited in the number of measures for each result and focus on obtaining useful information. It's impossible to measure everything because of the enormity and expense of such a task.

Performance measures or indictors of success might include:

• Improvement in student reading scores in specified grades;

• The number of students completing Grade 12 requirements; and,

• The number of Grade 9 students completing high school in 4 years.

Measures of progress and success relate to the evaluation of the Director of Education who is responsible for the implementation of the strategic plan and the school division's operational plan. School division success reflects the ability of the director to effect change and improvement. The information gained can provide valuable information to the board to enable them to give appropriate praise and direction to the school division's Director of Education.

| | |
|---|---|
| **School Boards Self-Evaluation** (sample questions) *On a scale of 1 to 5 – with 1 meaning 'Always' and 5 meaning 'Never' – rank the following issues in your school division.* | |
| | 1. Agendas are developed and circulated in advance of meetings. |
| | 2. Procedures are established to ensure two-way communication with students, staff and community. |
| | 3. On a regular basis, the board provides the director with direction for improvement. |
| | 4. The board bases decisions on reports regarding how well students are learning desired objectives. |
| | 5. The board establishes and publicizes annually a well-defined set of goals. |
| **Survey Parents** (sample questions) | |
| | 1. This school sets high expectations for student learning. |
| | 2. Our children enjoy the school. |
| | 3. The leadership in this school is effective. |
| | 4. Teachers motivate students through varied instructional strategies. |
| **Survey Students** (sample questions) | |
| | 1. School rules and regulations are fair. |
| | 2. My teacher makes expectations for assignment |
| | 3. My teacher helps me when I need help with my work. |
| | 4. School resources are available when I need them. |
| | 5. I have an adequate say in the decisions that affect me. |
| | 6. This school is a safe environment to learn. |
| **Survey Teachers** (sample questions) | |
| | 1. It is 'safer' to be quiet about organizational faults than to bring them out into the open |
| | 2. The leadership in this school is effective. |
| | 3. I am satisfied with the school facility. |
| | 4. Parents encourage and support student learning. |
| | 5. Efforts are made by school staff to discuss school goals and priorities. |

# Agendas

It is common for school board agendas to focus on immediate issues and concerns for these are the apparent critical matters that the board and the administration must address—they are problems requiring resolution and they are present now. However, one needs to remembered that strategic planning is a painstaking and time-consuming process of building a school division vision. The challenge is to make sure that it does not become a hollow, unkept promise that simply reminds school division participants of the way things "aren't." The vision needs to be sustained through action. "If you don't coordinate the organization's policies with the vision, you send a mixed message," says Warren Bennis. "If you say we believe in teamwork, but you don't surface conflicts and dissent, if you say we believe in autonomy, but require 15 signatures to approve someone taking a 25-mile trip, the dissonance between the vision and your actions creates cynicism." (Warren Bennis) Cynicism eventually becomes pervasive distrust.

School board agendas are key vehicles for furthering the strategic plan. They provide opportunities to deal with issues related to it and to make decisions that reflect the vision and the strategic plan. School trustees committed to strategic planning demonstrate personal credibility to communicate a vision. A leader - the individual who beats the drum for an organization's vision and values – needs to be perceived as having the competence and expertise to execute the vision, and as having the stamina to see it through.

The school board's work should be planned over a 36 month calendar with the work that needs to be done in the three 12 month periods clearly outlined (See Appendix 3 in the "Handbook for School Board Trustees". Critical decision points should be identified for specific meetings. Each meeting should include time for discussion of issues related to the implementation of the strategic plan. There needs to be 'dialogue before deliberation.' Milestones, or key success indicators need to be established when the vision is cast. If the strategic plan is to "steer the organization" the plan needs to be a part of every agenda. The Board needs to establish how decisions will be made, committees need to be established, a communication plan needs to be created, and reports need to be reviewed and discussed.

## Leadership Necessary to Make Aspirations a Reality

### New Behaviours

Leadership that exemplifies directness, openness to influence, commitment to the success of others, willingness to acknowledge our own contributions to problems, personal accountability, teamwork and trust. Not only must we model these behaviours but we must coach others to adopt them.

### Diversity

Leadership that values a diverse work force (age, sex, ethnic group, etc.) at all levels of the organization, diversity in experience, and a diversity in perspectives.

### Recognition

Leadership that provides greater recognition - both financial and psychic - for individuals and teams that contribute to our success
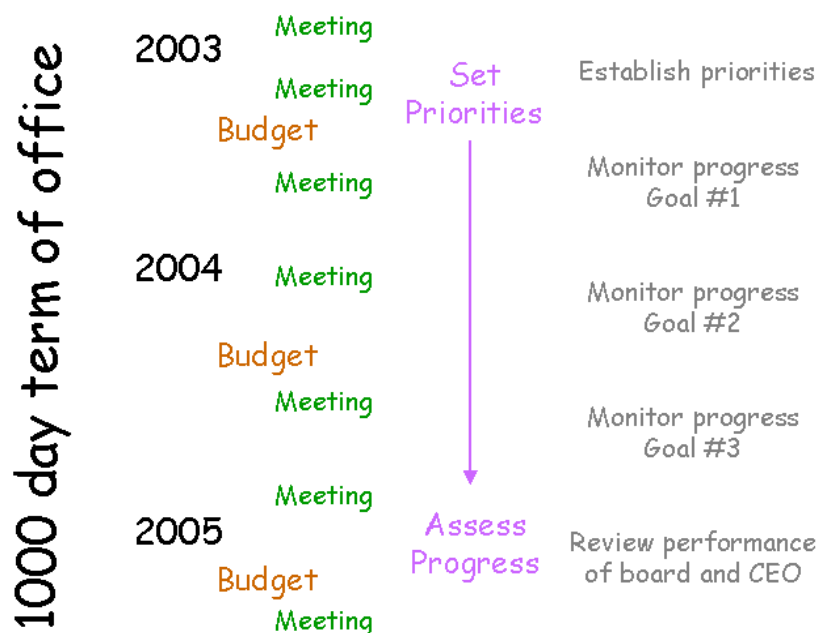
### Ethical Management Practices

Leadership that epitomizes the stated standards of ethical behaviour.

### Communications

Leadership that is clear about goals and performance.

### Empowerment

Leadership that increases the authority and responsibility of those closest to our students and customers.

# **Reflection**

Three key ideas from this module are:

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Questions I have about board of education planning:

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I want to learn more about:

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In order to strengthen the governance of our board of education, I make a commitment to:

| State the Area You Want to Improve | I Commit Myself to the Following Course of Action | When Will I Follow the Course of Action | Evaluation: How Will I Know I've Been Successful |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |

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