



ONTARIO PUBLIC  
SCHOOL BOARDS'  
ASSOCIATION

Leading Education's Advocates

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# POLICY 150

## Strategic Planning, Implementation and Monitoring

### 1.0 Policy Statement

On behalf of member Boards, the Board of Directors of the Ontario Public School Boards' Association ("OPSBA") is accountable for engaging in strategic planning to guide the work of OPSBA over a multi-year period and to ensure continued advancement of educational priorities in the Mission, Vision and Values.

### 2.0 Objective

Strategic planning is a cyclical process of setting, implementing and monitoring goals for OPSBA. This process involves learning from the past, reflecting on the present and planning for the future. It is most meaningful when the responsibility is shared and outcomes are understood and communicated.

### 3.0 Application and Scope

Strategic planning will:

- Take into consideration OPSBA's Mission, Vision and Values, and common priorities of member boards
- Be critically reviewed from the perspectives of equity, diversity and inclusion, human rights, accessibility, decolonization, anti-racism and anti-oppression, Indigenous sovereignty, culture, history, truth and reconciliation
- Engage educational partners which includes trustees, student trustees, member boards, directors of education, the Indigenous Trustees' Council, OPSBA equity seeking groups and OPSBA staff
- Consider leading provincial practices and relevant sources of data
- Include opportunities to build relationships with and share information with other educational stakeholders which includes the Ontario Student Trustees' Association (OSTA), unions and government representatives
- Include a monitoring framework
- Include educational opportunities for all trustees and Board of Directors members

### 4.0 Responsibilities

Board of Directors, Executive Council, Executive Director

## 5.0 Definitions

- 5.1 *A Multi-Year Strategic Plan* (“MYSP”) outlines long-term goals and targets, where applicable, for a defined period of time. It helps focus the work of OPSBA on behalf of Ontario’s public school boards, communicate to members and educational partners the plan to achieve the Mission and Vision, and act as an accountability tool by which progress is monitored. Where applicable, the MYSP will include measurable goals and timelines. It is actioned through the Annual Operational Plan.
- 5.2 The *Annual Operational Plan* (“AOP”) outlines shorter-term actions and/or areas of focus for a one-year period of time in order to help OPSBA achieve the priorities in the MYSP. It will consider input from trustees, emerging needs and include measurable goals, where applicable, with reporting timelines to focus the work of OPSBA and continue to advocate effectively for student achievement and well-being.
- 5.3 *Emerging needs* are matters that come up over the course of a year that could not be predicted as part of the annual planning process. These needs may be;
- addressed informally in the course of OPSBA’s day-to-day work,
  - identified by the Board of Directors through Board motion,
  - raised by Regional Councils\*, and/or
  - recommended by member boards through Policy Resolutions.
- \* *Regional Council Chairs are responsible for bringing emerging needs of member boards to Executive Council for discussion and determination of appropriate next steps.*
- 5.4 *Policy resolutions* are actions or priorities, identified by member boards, for consideration by OPSBA to inform work over the next year. Policy resolutions are presented to the membership for consideration at the Annual General Meeting (“AGM”) and inform the updated AOP.

## 6.0 Multi-Year Strategic Plan Development

The development of the MYSP will occur every four years immediately following the Municipal Election so that new priorities are established by and overseen by newly elected trustees. Accountable to the Board of Directors, Executive Council will oversee the process and act as a resource to the Executive Director (as required), and ensure regular updates are provided to the Board of Directors.

- 6.1 In the Summer and/or early Fall of a Municipal Election year, the Executive Director will draft a process to review and/or develop a MYSP (“Strategic Planning Process”) that considers the educational environment, effectiveness of the OPSBA’s work, engagement of all trustees (including student trustees), member boards and the Indigenous Trustees’ Council.

- 6.2 Executive Council will review the Strategic Planning Process and make a recommendation for consideration by the Board of Directors prior to the election.
- 6.3 The Board of Directors will approve the Strategic Planning Process to be initiated.
- 6.4 The Executive Director will execute the approved Strategic Planning Process with the new Board of Directors. This will include engagement of education partners such as trustees, member boards, directors of education and OPSBA staff and opportunities to build relationships with and share information with other educational stakeholders such as the OSTA, unions and government representatives.
- 6.5 The Executive Director will bring a summary from the consultation phase and present a draft MYSP to Executive Council and the Board of Directors for review and input in advance of the AGM.
- 6.6 The membership will consider and approve the MYSP at the AGM following the Municipal Election.

## **7.0 Implementation and Monitoring (Annual Operational Plan)**

The MYSP is implemented through the AOP. There will be four AOP beginning in the fall of the year after the municipal elections. The annual development process will include the following steps.

- 7.1 All trustees and member boards will have an opportunity to reflect on the current MYSP and provide input to inform the development of annual priorities.

At a minimum, this will include:

- a) Information collected to inform the MYSP consultation process (in the first year only)
  - b) Input from trustees at the Public Education Symposium, Indigenous Trustees' Council, Regional Council meetings (annual), and other online engagement opportunities
  - c) Policy Resolutions submitted by member boards
- 7.2 A summary of input along with proposed Policy Resolutions will be shared with Executive Council and the Board of Directors in advance of the AGM.
  - 7.3 Executive Council will provide a recommendation for consideration by the membership on any minor adjustments to the MYSP and Policy Resolutions.
  - 7.4 At the AGM, the membership may make decisions about;
    - a) the reaffirmation or minor adjustments to the MYSP, and
    - b) proposed Policy Resolutions.

7.5 The Executive Director, in collaboration with Executive Council, will engage in a planning session over the Summer to identify priorities for the upcoming year to update the AOP.

At a minimum, this process will include

- a) Reviewing trustee input and approved Policy Resolutions
- b) Identifying emerging needs
- c) Reflecting on ongoing work
- d) Discussing opportunities and risks

7.6 Following the planning session, the Executive Director will present AOP at the first regularly scheduled Executive Council and Board of Directors meeting of the year.

7.7 Executive Council and the Board of Directors will monitor progress through;

- a) staff reports that highlight information about the day-to-day work of OPSBA at each Board of Directors meeting,
- b) a mid-year update report to the Board of Directors, and
- c) the OPSBA Annual Report.

Where necessary, other reporting may be required.

7.8 Progress updates will be sent to all trustees, posted on the OPSBA website, shared with all trustees at Regional Council and Indigenous Trustees' Council meetings.

## **8.0 Resources**

- 8.1 [Multi-Year Strategic Planning: A Guide for School Board Trustees](#)
- 8.2 [Multi-Year Strategic Planning: Supplementary Resources for School Board Trustees](#)
- 8.3 [OPSBA Member Board Policy Resolution Submission Guideline](#)

## **9.0 History and Review**

- 9.1 Approved: *February 26, 2022*
- 9.2 Year of next review: 2026