



COMMITTEE OF THE WHOLE (PUBLIC)
Report No. 22-039

07 June 2022

Proposed Strategic Planning Framework for 2023-2027

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PURPOSE:

1. To discuss and obtain approval of the proposed framework and consultation strategy for the Ottawa-Carleton District School Board's next strategic planning process.

STRATEGIC LINKS:

2. Our current strategic plan is built on three culture statements: Culture of Innovation, Culture of Caring, and Culture of Social Responsibility. This plan has served us well as a grounding document, keeping us focused, particularly during the pandemic. The development of a new strategic plan is directly tied to our current strategic plan, leveraging what we have learned through its implementation. Over the next year, we will begin the development of a new plan while we continue our commitments under the 2019-2023 strategic plan.

CONTEXT:

3. Looking forward, there is a need to build on our collective understanding of what a strategic plan is and what it does. The strategic plan is not simply a legal responsibility of the Board; it is the expression of values which guide the decision making of the organization. The Education Act requires school boards to adopt multi-year plans that are three to five years in length. The OCDSB uses a four-year planning cycle that aligns with both legal requirements and business needs. The current plan will expire in August 2023.

The District has an established strategic planning process, which was used for the development of the past four strategic plans. The process begins in the spring of one school year, with consultation in the fall and the approval of a new plan the following spring. This timeline allows for a full cycle of research, consultation, analysis, and plan development; it also ensures we benefit from the experience of the outgoing Board of Trustees, and gives the opportunity for input and ownership for the newly elected Board of Trustees. This process has been successful and we are working to build and modernize the process based on our experience over the years.

KEY CONSIDERATIONS:

4. Process

The current strategic planning process consists of six steps: (1) Environmental Scan; (2) Mission, Vision, and Values Assessment; (3) Objectives, Goals, and Strategy Development; (4) Implementation/Organizational Capacity Assessment; (5) Development and Release of the Strategic Plan; and (6) Ongoing Implementation and Evaluation. The basic elements of the process are useful, but how we approach the work may change.

Transforming an established process requires careful thought. Reflecting on the process of developing transformative technologies like the smartphone, former university president David P. Haney (2020) said: “One of the lessons learned in those practices is that we no longer simply design products but rather human experiences with products.”¹ Adopting this human-centered approach, we have the opportunity to rejuvenate our strategic planning process. Throughout the course of the current strategic plan, and in particular during the Covid-19 pandemic, we have recognized the importance of building connection to a strategic plan so that it can serve as an aspirational tool to evolve our practice. With lessons from the previous process informing our thinking, we have outlined key objectives for the new strategic plan:

- Inclusive and representative of our diverse communities;
- Reflective of what we have learned about Indigenous ways of knowing and being, to leave our mark in a good way;
- Designed to build trust and a sense of connection with all stakeholders;
- Simplified, with highly focused approach;
- Fluid/able to respond to change;
- Strategically assessing risk; and
- Measurable for accountability and evaluation for future strategic planning.

To achieve these objectives, we are proposing a more fluid, interconnected, and highly participatory planning process with 3 main components: Listen, Leverage, and Lead.

¹ Haney, D. P. (2020, June 23). Thinking like a designer in uncertain times [Opinion]. *Inside Higher Ed*. <https://www.insidehighered.com/views/2020/06/23/times-crisis-colleges-should-ask-different-questions-they-do-traditional-strategic>

Listen



Listen to what people are telling us:

- Understand what makes their challenges challenging
- Gather community insights
- Gather employee insights
- Promote student voice
- Build connection

Listen to what the data is telling us:

- Identify issues that need to be addressed, using new and existing data sources
- Analyze internal/external factors (environmental scan; SWOT)
- Assess risks (Strategic Enterprise Risk Management)

Leverage



Leverage what we learn to build a plan that unifies:

- Use insights and data to set priorities
- Collaborate on long-term objectives (Board of Trustees)
- Establish clear and sustainable Key Performance Indicators
- Consider how budget decisions will contribute to the realization of priorities

Lead



Lead with care:

- Create awareness
- Implement with a hands-on, human centered approach
- Build connection

Lead with purpose:

- Monitor progress
- Promote transparency and accountability
- Adapt and revisit as necessary
- Measure impact

5. **Timeline**

The strategic planning process takes one year and runs from June 2022 to June 2023. The timeline has been designed so that we benefit from the significant experience and valuable insight of the current Board of Trustees and a newly elected Board.

General Timeline	
June 2022	Approval of the Strategic Planning Process
June 2022 - November 2022	Development of Environmental Scan
October 2022 - February 2023	Public Consultation Period
February 2023 - April 2023	Collaborative Plan Development
April 2023 - May 2023	Consultation on Draft Plan
June 2023	Discussion and Approval of Plan

6. **Trustee Leadership**

The Board plays an active role in the strategic planning process, approving the framework and schedule, discussing the environmental scan, reviewing the consultation, and developing a new vision, mission, and strategic priorities. The consultation strategy has been designed to provide increased opportunities for trustee leadership in the development of the new strategic plan. Trustees will be asked to play an active role in the various stages of consultation: including one-to-one conversations with stakeholders, participation in group conversations, and co-hosting community meetings. Each of these engagement opportunities is outlined in more detail below in Section 15: Methods of Receiving Advice.

7. **Strategic Enterprise Risk Management**

Under the current strategic plan, the District has adopted a more structured approach to risk management. The Strategic Enterprise Risk Management (SERM) framework will be embedded into the strategic planning process. This ensures that the organization is identifying key risk factors as part of its planning and priority setting process.

8. **Environmental Scan**

Assessing the environment, including strengths and weaknesses, threats and opportunities, and capturing that information in an environmental scan report, ensures that there is a common understanding of issues, risks, and needs for future priority setting. The environmental scan is a research report that draws on data from several sources and departments, and highlights population growth, demographics, enrolment trends, programming, technology usage, human resources data, and other quantitative and qualitative data.

9. **Increasing Staff Connection to the Strategic Plan**

Feedback from the Staff Valuing Voices Engagement Survey clearly identified a need for greater employee connection to the strategic plan. One way to address this is to increase employee engagement in the planning process. For example, there are a number of departments who contribute to the development of the plan and rather than working one-to-one, we will bring departments together to collaborate on the research and analysis that forms the basis for the plan.

Reflecting on past practice, regular updates to the Board of Trustees have been part of our practice, but interim staff updates were not built into the process. To address this, staff will establish an employee working group that will provide a forum for a representative group of employees to meet and discuss the strategic plan at key points in the process, provide advice and guidance, and strategize about how to increase employee engagement in the planning process.

10. **Work Continues on Current Plan**

While the strategic planning process is being implemented over the next year, work on the current plan will continue, including the development of the Board workplan and Director's strategic action plan for the upcoming school year. In addition, we will continue to monitor progress and provide updates to the Board over the next year.

RESOURCE IMPLICATIONS:

11. There are costs associated with the development of the strategic plan and these are built into the annual budget. Some are one-time costs and some are investments that allow for multiple uses. These costs can include (but are not limited to) software, consultation expenses, meeting accommodations, materials and supplies, and release time (as required) for staff participation.

COMMUNICATION/CONSULTATION ISSUES:

12. **Consultation to Create Ownership Capital**

The objective of consultation is to increase the connection people feel, and the impact they have on the resulting strategic plan. To achieve this, it is important to set the tone for the consultation by engaging voices from the community early on in the process, and by doing so with genuine interest in what the community has to offer.

Creating ownership capital can be achieved by sharing challenges with people and asking for advice. Notice I said advice, not feedback or input. Advice is something you ask for from people you trust.²

² MacLeod, D. (2021). *Scaling conversations: How leaders access the full potential of people*. John Wiley & Sons Inc. p.18.

By taking this approach, we will be supporting the development of a plan that stakeholders are invested in because it considers their needs and reflects the value that they bring to the process. We can take this approach by asking questions, such as: *‘How has your lived experience informed what you think the District’s priorities should be?’* and/or *‘What advice do you have on things we can do to be more successful?’*

13. **Informed by Data from the Staff Survey and Community Check-Ins**

We have considerable data gathered through the Staff Valuing Voices Engagement Survey and the Thoughtexchange Community Check-Ins which will inform our work. This data has highlighted the need for strategies to increase participation, inclusivity, and representativeness so that we develop a plan that resonates with the community. This data will also be used to set the context in the environmental scan.

14. **Key Audiences**

There are four audience streams whose advice and experience will shape the plan:

- **Staff** – The engagement of staff is essential in order to benefit from their expertise in the development of a strategic plan that they see themselves reflected in, and to secure their participation in the implementation of the plan;
- **Students** - An important part of our current strategic plan is to increase student voice. We have seen impressive participation from students in surveys/check-ins and engagement opportunities. Our ability to engage students, particularly in a virtual way, has improved dramatically and will lend itself to incorporating student-led priorities into this strategic plan;
- **Parents/Guardians and Public** – Parents, guardians and community members are key stakeholders. This includes everyone in the community who has a child enrolled in school or who has an interest in public education and wants to contribute to the dialogue. We have heard a tremendous amount of feedback from parents and the community recently, so the key to this consultation will be harnessing and contextualizing those voices, and reaching out to those who tend to not participate; and
- **Community Partners** – The support and assistance of our community partners is very important. This includes OCDSB stakeholders, education sector partners, municipal partners, affinity groups, community groups, not-for-profit associations, social services and health care agencies, community associations, community foundations, and the business community.

15. **Methods of Receiving Advice**

To encourage participation, a multi-layered approach to engagement is planned. This includes opportunities for one-to-one conversations, small and large group discussions, and/or submissions of written input. The intent is to optimize the benefits from the resumption of in-person gatherings, coupled with the increased accessibility made possible by our improved use of virtual tools.

Using technology to gather input has been an important part of our practice and ensures that individuals who do not want to attend a meeting have meaningful opportunities to provide voice and share their advice. This will be achieved through use of electronic survey/feedback tools and email.

For stakeholders who seek more active participation, there will be three methods of conversation:

- **Authentic Conversations;**

During our Community Check-Ins, we heard from staff that system leaders need a better understanding of daily school operations. Building on that, this consultation process includes authentic, personal conversations to enhance our understanding of the lived experiences of our students, staff, and families.

Trustees and members of senior staff will be asked to plan authentic conversations with individuals from the following audience groups: students, parents/guardians, staff, and community members. These conversations are casual, loosely-structured interviews which will be voluntary. Interested participants can sign-up and will be asked to provide some demographic information about themselves, which will then be used to take a stratified approach for selecting interviewees. By using this approach, we will aim to capture a range of perspectives. More detailed information about this and a template for collecting advice from participants will be provided. All responses will be confidential, and where appropriate, participants may be asked for permission to be quoted anonymously.

- **Strategic Conversations;**

Strategic conversations are group conversations with established partners and organized groups. The goal of this strategy is to maximize participation from stakeholder groups that have established relationships with the District. By tapping into structures that are already in place (e.g., advisory committees and groups, affinity groups, student groups, collaborative tables), we can be targeted in our approach to capture different voices. These partners can be valuable resources as we work to identify opportunities to reach different communities of interest. To build on relationships and synergy, we plan to bring different groups together for both large group and smaller breakout group conversation. For example, we may bring several advisory committees together, allowing them the opportunity to interact, and still allow for breakout discussions by committee. At this time, we are planning for the strategic conversations to be held as virtual meetings, over a 3-4 week period.

- **Scaled Conversations;**

Scaled conversations are designed for parents/guardians and community members, and members of the public. These are public discussion forums hosted by the area trustees, a superintendent, and staff lead.

Scaled conversations will be held in six different geographic areas around the city. To ensure consistency, a common format and presentation will be provided. However, the primary focus will be on listening and ensuring participants have the opportunity to engage, advise, and ask questions.

Part of the planning will include working with Indigenous partners, advisory committees, Multicultural Liaison Officers (MLOs), and others, to ensure effective promotion, resources, and supports are in place so that all members of the community are able to participate.

16. **Updates and Supporting Documentation**

Updates will be shared through documents and videos, communicating detailed information and high-level summaries, which will be promoted on the District website, school websites, staff portal, and all District social media channels. To support the participation of communities which may be traditionally less engaged, key information about the consultation process will be available in different languages, based on community need.

For this process, the following resources will be developed and/or used:

- Environmental Scan – a resource that assesses a wide range of factors which influence the operation of the school district (i.e., political, economic, social, demographic, technological, etc.);
- Strategic Enterprise Risk Assessment – assessment of top threats, risks, and opportunities;
- Web resources – webtext, resource document, and a background video will be used to share information about the planning process and to summarize the environmental scan;
- Current strategic plan, strategic action trackers and reports on progress; and
- Ministry Strategic Plan Resources.

These documents are intended to create an opportunity for stakeholders to become aware of educational issues and to think about future directions of the District.

RECOMMENDATION:

THAT the proposed strategic planning framework for 2023-2027 and the outlined consultation strategy in report 22-039 be approved.

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