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A Broadly Shared Mission, Vision and Goals Founded on the Aspirational Images of the Educated Person **Sudbury Catholic District School Board**

Background

The Sudbury Catholic District School Board is a leading provider of public education within the region of Sudbury, Ontario offering a comprehensive range of programs in French, English and Ojibway and services with a commitment to excellence in learning. The Sudbury Catholic District School Board is one of four publicly funded school boards in Sudbury with over 6300 students. Sudbury Catholic District School Board currently operates 20 schools including 15 elementary, 4 secondary and one adult education school. Sudbury Catholic District School Board opened 1 new elementary school in 2012, and it is anticipated that two more elementary schools will be built by September 2016. School communities include the Greater City of Sudbury as well as the Municipality of Killarney.

Sudbury Catholic District School Board is committed to the principles of equity and inclusivity enabling each student to learn and grow to his or her full potential.

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This case study provides an overview of the strategic planning process that the district engaged in over a 7 year time period. As the *Strong Districts and Their Leadership* research highlights, this case study reflects how the Sudbury Catholic District School Board carried out a transparent visioning and direction setting process through extensive consultation. The case study describes how the mission, vision and goals of the organization were made widely known and how those directions shaped the board's priorities, direction setting, Board improvement planning and its multi-year operational plan.

Why This Focus?

In 2007, the newly appointed Director of Education as outlined in her entry plan, took the first year to understand the uniqueness of the Sudbury Catholic community environment. It was evident that there was the need for a more formalized multi-year planning process to be put in place. The first step in accomplishing this goal was to establish relationships as well as to validate this planning process by meeting with all stakeholders and trustees, as well as reviewing the operations of the organization.

Consensus among stakeholders consulted by the Director of Education was that there was a need for the board to have a widely understood strategic direction and focus. Trustees especially supported the Director of Education's undertaking a vision, mission and strategic planning process.

A strategic plan and system priorities had never been developed in the history of the Board. The Board did have a mission statement that was dated and had little to no connection to the current climate and needs of the learning organization. There were many reasons to embrace the undertaking of a robust and transparent strategic planning process as it would engage all levels of the organization in determining future direction of the Board and providing clarity and coherence to future planning efforts.

What Was Done?

The first step in the process was to develop a more comprehensive understanding, with the trustees and senior administrative team, as to what strategic planning was and the positive outcomes it could bring. The majority of trustees, and the senior team had never before participated in such a process and so they had limited knowledge of what it would involve. It was important to clarify for participants that strategic planning encompasses developing a vision, mission, goals, strategies, objectives and action plans. Such a process aims to bring clarity and coherence to the planning processes, a necessary condition for effective operation and innovation in the board. It was also important to define both the trustee's and senior team's roles in this process.

Establishing and monitoring the implementation of the Board's Multi-Year Strategic Plan with a budget that supports it, is a very important legislated responsibility of the board of trustees within an effective governance model. The Education Act requires boards to have a Multi-Year Strategic Plan in place. This Multi-Year plan provides boards with a focus for a small number of strategic directions to be established with a focus on student achievement. The Board also has a responsibility to its constituents and a coherent strategic plan provides the basis for reporting on, and being held accountable for, what the Board sets out to achieve. Directors of Education are also required to review the multi-year strategic plan with trustees yearly.

What was not anticipated along the way was the passing of Bill 177, the *Student Achievement and School Board Governance Act, 2009* whereby the Ontario government reviewed local education governance. The timing of this process was fortuitous as this bill further defined the role of Trustees outlining the importance of trustees monitoring the strategic and multi-year plan. We were positioned for success with the timing of this process and with our Trustees.

Because the Director of Education knew that she needed to be an active participant in the process, she hired a facilitator to lead participants through the formation of a vision statement, as a starting point.

Developing a shared vision for an organization that had nothing in place was the logical place to start. The intent was to create the energy and enthusiasm for our shared beliefs in Sudbury Catholic District School Board. A vision statement is vital to any organization because it provides a sense of shared purpose. Everyone in the district needed to be united under this one vision, and this shared clarity would provide the focus and energy for moving the process forward. A shared vision, we hoped, would give us a common language that would bind us together as we worked through the more intricate steps of the process.

It was also important as we undertook this process to be clear that we would have to do system consultation on our vision, as opposed to imposing the vision on the organization. A shared vision, we believed, had to be one that many people could be committed to and one that was a reflection of their own personal values and beliefs for the district. The boards of Trustees were well known, visible and active in the community and in setting the direction they eagerly agreed to begin the process with the senior team in a retreat setting. Through a day and half of discussion and consensus a vision statement was born.

Sudbury Catholic Schools ... Creating Hopes and Dreams Through Excellence.

Also agreed to at this time were an understanding of what the entire completed process would look like and a further validation of roles and responsibilities. Immediately following the vision formation the Director of Education and the Chair of the Board met with all schools, board staff, parents and other stakeholders over the remainder of the school year to get input and support on the vision process. It was also an opportunity to gather input from the system on what those most impacted felt were the priorities to support this vision. Overall it was a tremendous success as many stakeholders indicated that they had never been asked before what mattered to them most. They felt valued and listened to.

What Happened Next: The Creation of Strategic Priorities and Objectives

The following year the same consulting service was engaged by the Board to facilitate the development of strategic priorities (to help implement the Board's vision statement) with the Board's senior leadership team. This process also took place in a retreat setting over two days in January 2009. The facilitator continued to take the role of guiding the discussion and group tasks, in order to achieve the desired outcomes. The project outcome was achieved through extensive dialogue and discussion as well as examining the input gathered from the system prior to this. The participants agreed to support the following Strategic Priorities and Objectives.

Vision Statement

Sudbury Catholic Schools ... Creating hopes and dreams through excellence.

Strategic Priorities and Objectives

- **We live a culture of learning for all**
Objective: We will encourage and support students and staff in their pursuit of excellence.
- **We live a culture of Catholic faith and community**
Objective: We will promote our Catholic communities as places rooted in welcome, worship and witness.
- **We live a culture of respectful relationships.**
Objective: We will engage all students, staff and stakeholders in an environment of collegiality and mutual respect.
- **We live a culture of communication**
Objective: We will engage in reciprocal, open and transparent communication with students, staff and stakeholders.
- **We live a culture of technology**
Objective: We will integrate and embed technology at all levels of the organization.
- **We live a culture of the innovative use of resources.**
Objective: We will champion the proactive and creative use of human and material resources.

The steps used to develop the final Strategic Priorities and Objectives noted above, included setting the context for a strategic plan, reviewing the strategic planning process, reviewing the senior team's organizational responsibilities, and reviewing the organizations strengths, weaknesses, opportunities, and threats. Equally important to the process was what the participants established in the process to validate the strategic priorities and objectives with the board's stakeholders immediately following the Board's approval. The Chair of the Board joined the participants for the latter part of the process and provided his support for the outcomes that were achieved. The board of trustees, at a follow up board meeting, approved these strategic directions.

Multi Year Operational Plan – Challenges Along the Way

The Director of Education and the senior team agreed to begin the process of developing system goals as the next phase of the strategic planning process once the Board approved the priorities and objectives. In terms of lessons learned this was the most difficult part of the process, as the multi-year plan should be revisited each year. The need to revisit was further complicated by the addition of two new Supervisory Officers the following year neither of whom had been part of the strategic planning process. There needed to be transition support provided to the new members of the team on the process we experienced and its value to the planning process.

Immediately following the validation of the strategic priorities, the creation of the multi-year plan proved onerous to the team in its first year. This was mostly due to our collective inexperience with establishing precise and targeted goals aligned to

the Board Improvement Plan for Student Achievement. At the same time, with the onset of Bill 177, we were trying to shift the Trustee’s focus to more of an oversight function and to define their role as one that assesses progress towards achieving the goals the team had established.

Significant Turning Points

A powerful turning point, in the first few years after struggling to create the multi-year plan was to develop a visual representation of our efforts. This visual was aimed at helping the team understand that the multi-year plan need not include every intricate level of detail about all we were trying to accomplish during the course of the school year. A visual model of our planning frameworks assisted the senior team with a range of portfolio responsibilities to understand that it was okay to have a plan within the plan. It was definitely a shared “Ah Ha” moment for all. This is where the egg diagram below helped solidify the shared understanding.



One of the most significant turning points in this process was our decision to align the Board reports to the strategic directions we had established. Board report formats were changed to reflect the topic of the Board report but also the strategic priority this report was speaking to. It also was intended to give Trustees a progress

report aligned to the multi-year plan - in other words, to confirm to Trustees that they were carrying out their monitoring function successfully and that planning was on target. The intent was to be clear that reports were not coming to the Board “out of left field” but were aligned with our formative planning process.

Trustees became accustomed to this process and the Chair requested that we bring forward an overall progress report on the operational plan to the board 3 times during a school year. It was evident that Board Reports were covering the areas the Trustees and the senior team were committed to undertaking and that most had an evaluation component reflecting progress and next steps.

The benefit of this type of planning made the yearly plan more achievable. The senior team was able to evaluate those areas aligned to our strategic goals that required a stop, start, and continue focus. It also allowed us to see the re-alignment of budget that may be necessary with our priorities.

Where We Are Now?

During the summer of 2011 the senior team and Trustees reviewed the strategic directions after having implemented these during a four-year cycle. The purpose of the review was to determine if the existing priorities were applicable and also to see if we could streamline our focus. In addition we were now comfortable enough as a team to re-visit our Board’s mission statement, which at the onset, we had set aside. This engagement, through a facilitator was successful. Our new strategic priorities were simplified from 6 priorities down to 5 and more current language as to their intent was applied. The priorities now read:

- We are called to live a culture of Catholic Faith and Community.
- We are called to live a culture of excellence and learning for all.
- We are called to live a culture of innovation.
- We are called to live a culture of respectful relationships and responsible governance.
- We are called to live a culture of stewardship in the use of all resources.

Once again, a full consultation process was undertaken to solicit support for the realigned priorities. What was more exciting for the team was what the finalized mission statement stated. The previous mission statement was close to two pages long and no one could recall the history or evolution of it. Also, it was clear that the system did not use it in any board or school correspondence, therefore leaving it meaningless to most. Again, through the guided process the new revised mission statement reads:

To nurture and develop the mind, body and spirit of every student within our Catholic learning community.

It was felt overwhelmingly, that the newly crafted mission statement more clearly defined who we were and what we do. It evoked a sense of pride and ownership. This ownership and sense of pride was so strong that all Board employees and staff supported the decision to make it the statement beneath all of our signatures in

Board correspondence, signage and email. The Board's mission statement would be repeated and used by all. We encouraged our principals to also use our Board's mission statement in their school newsletter and parent information materials. It was evident after a year that the mission statement was finding its way onto more documents and correspondence as new initiatives were introduced and implemented.

Advice for Others

Based on the experiences with strategic planning described in this case, we have six pieces of advice for others considering such a process:

1. When undertaking the strategic planning process, it is good to have a team that is comprised of a cross-section of representation from the Board. In this way they are responsible for the messaging and shared ownership of the process.
2. Communicate, communicate, communicate and be visible during the process. Doing this effectively means doing a significant amount of outreach to your system. You also have to give participants the belief that they are an active part of the process and that their insights and beliefs are listened to.
3. Expect that every step of the process of effective strategic planning and goal setting will involve comprehensive consultation, analysis and review to reach the end result. This takes time and patience to achieve.
4. Also recognize that the simpler the priorities are the more well understood they will be by the organization and hence followed. Use clear and well understood language and avoid "edu- speak".
5. Strategic plans require consistent leadership and need to be reviewed after a reasonable timeline of no more than four to five years. School Districts needs and educational trends and research are ongoing and require a re-alignment of priorities.
6. Finally, effective strategic planning requires a champion in the Director of Education and with the Board of Trustees support to lead and review the process.