

**CODE**

COUNCIL OF ONTARIO  
DIRECTORS OF EDUCATION

CONSEIL ONTARIEN DES  
DIRECTIONS DE L'ÉDUCATION

# The Multi-Year Strategic Plan

Every Board's Roadmap to Success

LEADERSHIP CONVERSATION





# Executive Summary

Whenever we start out on a journey in life, we benefit from the use of a roadmap and the surety of knowing our intended destination. In education, a core responsibility of the Board of Trustees is the approval of a Multi-Year Strategic Plan (MYSP) that provides a concise articulation of a Board's priorities and the goals the Director has responsibility for delivering. It is done in a manner that is simultaneously precise and detailed about the path to be taken and the benchmarks to be observed and assessed. More than that however, in its ideal, it excites and motivates an entire school system, providing inspiration for the work and learning to be done, and a better understanding of "the why" behind it all. The plan benefits when there is a well-conceived

effort to engage the perspectives of the various members of the board community and to ensure a diversity of voices and perspectives are considered. The development of the plan, its implementation and the regular monitoring of outcomes are all necessary ingredients to ensure a successful MYSP. In a world and educational landscape which can be overwhelming in the number of goals, plans, resources and potential metrics available, a strong plan will focus all system stakeholders on a common purpose, providing much needed coherence and alignment.



***A Multi-Year Strategic Plan will provide a **coherent and consistent lens** for decision making...resulting in improved performance in student achievement and well-being.***



## Introduction

The Board of Trustees holds responsibility for approving and monitoring the Multi-Year Strategic Plan. The Director of Education holds the responsibility of animating and delivering the strategic outcomes articulated in the plan. A well-articulated and operationalized MYSP will provide a coherent and consistent lens for decision making and ultimately lead to improved system outcomes, specifically resulting in improved performance in student achievement and well-being.

A strong multi-year strategic plan, grounded in good governance involves setting clear roles and responsibilities, along with defined goals and strategies to achieve high standards of achievement and well being. This involves a disciplined and rigorous approach to aligning resources accordingly, as well as ongoing monitoring and transparent reporting on stated goals.

# What the Research Says: Best Practices in Strategic Planning

Strategic Planning is a systematic process that aims to enhance the quality and effectiveness of schools to improve student outcomes. This process is ideally informed by a review of best practices for the development of a multi-year strategic plan.

## Alignment with Mission and Vision

Ensure that the MYSP is aligned with the system's mission and vision statements to maintain coherence and focus. This should be the first building block as the plan is conceived and priorities are identified. Such an approach ensures that Simon Sinek's invitation to begin with answering the question "why" is indeed the foundation (Sinek, 2009).

## Data-Driven Decision Making

A concerted effort must be made to foster a culture of inquiry, and to ensure that demographic, quantitative and qualitative data is used to inform strategic priorities and to measure progress, e.g., student achievement, standardized metrics, school climate and student/staff census data, student voice, parental/caregiver input, external factors (Katz & Dack, 2014).

## System and Community Engagement

It is critical that a diversity of voices representing the various school board community members (e.g., students, parents/guardians/caregivers, teachers, broader community members) are solicited. Care must be taken to ensure that voices that are not normally engaged are given an opportunity to participate. This may involve ensuring a variety of formats and tools are employed, e.g., online, in person townhall/meetings, surveys. This is critical in the planning process to ensure broad buy-in and a diversity of perspectives (Bedard, 2021).

## Continuous Improvement

Strategic Planning is iterative and therefore plans need to be regularly reviewed and adjusted based on feedback and changing circumstances.

Effective strategic planning not only focuses on immediate improvements but also on long-term sustainability, managing change, and adapting to evolving educational landscapes (Hargreaves & Fink, 2015).

# Legislative and Policy Context

Approving and monitoring the implementation of a MYSP, with a budget that supports it, is a very important legislated responsibility of the Board of Trustees. The Education Act (section 169.1) mandates that the MYSP span a minimum of three years and its purpose is to assist school boards in setting long-term strategic priorities and goals. See also, [Module 6, Ontario School Trustees: The Strategic Role and the MYSP](#).

In 2023, the Ontario Ministry of Education established the Student Achievement Plan as part of Bill 98 – the Better Schools and Student Outcomes Act, 2023, which amended the Education Act. The Student Achievement Plan sets out the key provincial priorities in O. Reg. 224/23: Provincial Priorities in Education – Student Achievement. All boards are required to develop their MYSP consistent with the policies and guidelines established by the Ministry related to these provincial priorities and report annually on Ministry-defined performance indicators.

In addition to setting direction, the MYSP is a policy document that fosters public confidence through the reporting associated with it and by being a catalyst to positive change. Bill 98 speaks to the public communication and reporting required, as well as the requirement for parental/caregiver engagement. ([Better Schools and Outcomes Act, 2023](#)). Specific indicators must be set out in the Student Achievement Plan, which in turn map to

the MYSP.

## Regular Reporting

Ideally, all reports to the corporate Board of Trustees should reflect an alignment to the priorities identified in the strategic plan. As stewards of the system’s vision and mission, trustees are responsible for approving and monitoring the plan and thus, their time in the Boardroom should be purposely focused on ensuring alignment and assessing progress against stated goals.

This regular reporting and monitoring support the Performance Plan requirements found within the process of the Directors’ Performance Appraisal (Reg 83/24). If the Minister is not satisfied with a board’s progress in implementing its MYSP or its goals, the Ministry may assign support personnel.

# The Role of Directors of Education

As the senior appointed position responsible for the administration and management of the school district, the Director of Education has core responsibilities that align to the work of the MYSP, including:

**Monitoring the Multi-Year Strategic Plan** by ensuring fidelity to the priorities and goals in the plan and through regular reporting to the Board of Trustees on staff's progress against those stated goals. As outlined below, this reporting should be facilitated through a well understood logic model (The Act, Section [283 and 283.1](#)).

**Ensuring a Logic Model** that takes the plan from needs assessment, to planning, followed by implementation and evaluation. A logic model indicates what the intervention's intended outcomes are and gives participants a common language and point of reference (Center for Research Evaluation, 2021). Where possible, the logic model must weave into all of the system plans which feed into the MYSP, so that data collection for reporting is easily facilitated. Each goal should have an indicator of success that is either qualitative or quantitative in nature, and that is supported by strategic actions taken and where possible, stakeholder feedback.

**Providing the Annual Report to the Board and the Minister of Education** each year in December, which is then posted to the board website on or before January 31st, which should also act as a public reporting of progress on the MYSP (The Act, Section 283 (3)).

# Bringing an Equity Lens to Strategic Planning

## Catholic and French Boards

While working toward fulfilling the stated priorities of the Ontario Ministry of Education, Catholic and French Boards have a mandate to ensure that their strategic plans similarly protect and promote their respective, distinct denominational and French language rights. Thus, in Catholic school boards it is expected that a core priority will be connected to establishing a Christ-centred mission in their school systems, one that nurtures their Catholic identity, deepens faith formation and promotes their constitutional right to publicly funded Catholic schools. Similarly, French boards will ensure strategic plans prioritize and protect French-language public education.

## The Ontario Human Rights Code

Developed in 1962, the Ontario Human Rights Code provides commitments to equal rights and opportunities and prohibits discrimination based on a protected social area, such as race, colour, gender identity or expression, sexual orientation, disability, creed or age. Through [PPM 119](#) there is a requirement to develop “an equity and inclusive education policy that includes a religious accommodation guideline in accordance with the requirements set out in (the) memorandum and the strategy, and that complies with relevant legislation”. PPM 119 requires a board’s equity and inclusive education policy to address eight areas of focus, and requires that school boards’ policies be comprehensive and cover the prohibited grounds of discrimination in the Ontario Human Rights Code. Research indicates that there are concerns about cultural relevance and bias, and appropriateness of accommodations and modifications, as well as inequitable opportunities for Black and racialized students (Campbell, 2020). Therefore, in keeping with the [Considerations for Program Planning](#) (2024), particular focused attention to equity must also be brought to the Strategic Planning process, with a keen eye to reducing identified gaps through a wide range of robust strategies that map to all aspects of the plan, as well as, and perhaps more importantly, to the process to develop it.



***True reconciliation with our Indigenous communities requires a new vision, based on a commitment to mutual respect.***



## **First Nations, Métis, Inuit and Indigenous Voices**

Research tells us that true reconciliation with our Indigenous communities requires “a new vision, based on a commitment to mutual respect” and that it is necessary to “include Indigenous knowledge and ways of knowing throughout the education systems.” In the words of the Truth and Reconciliation (TRC) Calls to Action: “The way we educate our children and ourselves must change” (TRC, 2015). Thus, our methods of engaging First Nations, Métis, Inuit and Indigenous voices in the development of our Strategic Plans must evolve and make use of our local First Nations, Métis, Inuit and Indigenous Education Advisory Councils as a forum where their input can be gathered. As well, the board’s First Nations, Métis, Inuit and Indigenous Education Plan should align with and map to the MYSP, where ideally there is a TRC informed goal. Districts will excel in developing a strong MYSP, by working collaboratively with Indigenous Elders and educators to collaboratively determine appropriate and authentic methods to involve First Nations, Métis, Inuit and Indigenous students, families, Nations and communities.

# Common Challenges in Strategic Planning

## Lack of Clear Goals

Efforts must be made to ensure that goals set are not vague or unrealistic, or difficult to measure and achieve. Ensuring that the number of goals is manageable is also key.

## Resistance to Change

It is important to understand the potential resistance from community members, as well as the potential reasons for that resistance, and to formulate strategies to manage and overcome these challenges.

## Inadequate Resources

One of the key processes most tightly connected to the strategic plan is the budget setting process. Success will be difficult to achieve if there is insufficient funding, staffing or time allocated to the strategic planning process and the priorities identified therein. The old adage, “show me your budget and I will tell you what you value” comes to mind.

## Ineffective Communication

If key stakeholders do not know or understand the Strategic Plan priorities or see their role in its implementation, it is unlikely to succeed. The MYSP priorities and goals must be routinely referenced as a point of implementation and of monitoring for it to be a truly “living document.”

## Determining Metrics

It can be challenging to determine that the ‘right’ goals are identified, while ensuring that we are not just measuring actions taken, but also true impact and improvement. Thus, what we measure and how we measure it, is key, as is the care that needs to be taken to distinguish the difference in our data between a correlation and true causation.

# Steps in the MYSP Process

**01**

**Setting the  
Foundation**

**02**

**Community  
Engagement**

**03**

**Identify  
Strategic  
Priorities**

**04**

**Developing  
the MYSP**

**05**

**Implementation  
of MYSP**

**06**

**Monitoring  
the MYSP**

# Steps in the MYSP Process

## 01

### Setting the Foundation

The Director will want to ensure that there is capacity both within the senior team and with school leaders to understand the MYSP process and to understand their responsibilities with the same. This will be strengthened by collaborative development of the roadmap to follow. Also, within this early phase a review of mission, vision and value statements that ground the board is necessary to provide a strong foundation.

## 02

### Community Engagement

Both Trustees and Directors must prioritize community engagement, seeking input from students, parents/caregivers, teachers, and local organizations to inform their decision-making processes, particularly as it applies to student achievement and well-being goals (Bill 98). This engagement should also be grounded in, and foster, strong data collection and analysis. As noted above, attention must be given to seeking voices typically unheard. Regardless of the profile of the system, there are a variety of approaches and tools which can be utilized to assist in this process, e.g. third-party facilitator, town halls, board researchers/surveys, online engagement tools.

## 03

### Identify Strategic Priorities

Grounded in the evidence base and feedback procured, as well as articulated Ministry of Education goals, a short-list of priorities should be developed and shared with the Board of Trustees and other stakeholders for feedback. Attention should be given to trends, opportunities and challenges.

# Steps in the MYSP Process

**04**

## **Developing the MYSP**

This process is recursive, ideally seeking feedback in development, as noted above, and grounded in the priorities identified. A defined number of goals, with corresponding action items, indicators of success, timelines and roles of responsibility should be also identified.

**05**

## **Implementation of the MYSP**

The plan is executed, facilitated by strong systematic, and consistent communication and implementation, and there is clear understanding by all, of their roles and responsibilities.

**06**

## **Monitoring of the MYSP**

There is regular monitoring of the progress against the stated goals. Agendas for Board meetings, senior team meetings and administrator/manager meetings should be intentionally designed and connected back to MYSP priorities and goals with regularity, so that there is a clear understanding of the collective commitment to the desired outcomes. This leads to a “shared mindset” rather than simply alignment (Fullan & Quinn, 2016).

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# Benchmarks for Success

# Benchmarks for Success: Indicators of a Strong MYSP

*The MYSP is a living document.*

- There is broad engagement in both the formulation of the plan and in its implementation.
- It covers a time period of not less than 3 years and not greater than 5 years.
- All stakeholders are represented in the plan and a district culture is built that identifies and interrupts long standing patterns of marginalization (Honig & Rainey, 2021).
- There is consideration of the external environment, such as demographics of the area, changes in provincial directives, collective agreements, new approaches in pedagogy (Ontario School Trustees, Module 6).
- Trustees focus their energies in the Boardroom on monitoring fidelity to the MYSP and its stated goals.
- All members of the senior team are clear on their areas of responsibility and connection to the

MYSP, and work collaboratively to achieve identified goals. Similarly, ownership extends to managers, school leaders, educators and families, who all understand their role in the plan.

- The indicators and metrics that will be used to measure success are clearly understood by stakeholders throughout the system.
- In addition to the Ministry mandated twice annual formal reports on the indicators found in the full MYSP, the reports that the Board routinely receives provide evidence of the implementation of the MYSP Priorities.
- Trustees, senior team and all stakeholders acknowledge that the MYSP is a living document and that dynamic changes in strategy may be necessary in order for goals to be achieved.

# Conclusion: A Successful Roadmap

The attainment of a successful Multi-Year Strategic Plan is realized when system stakeholders share a clear understanding of the desired destination and the collective journey that is intended to bring them there. There is a concerted effort to unite stakeholders in disrupting patterns that do not serve the marginalized and under-represented students.

When anchored by a robust logic model, supported by broad stakeholder engagement, and regular systemic monitoring and reporting of outcomes, a strategic plan becomes a catalyst for enhanced system-wide improvement while achieving stronger results for all.



# For Further Reflection

1. What evidence can you provide of a clear logic model connected to your MYSP and do all system stakeholders understand that model? What evidence suggests the logic model is understood and is being implemented?

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2. What specific strategies have we employed to ensure a diversity of data and perspectives have been employed in developing and monitoring our MYSP?

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3. How will the team maintain a focus on and momentum toward achieving the goals found in the MYSP?

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4. How will the team collect feedback and assessment information to inform the required reporting requirements? Are you able to answer this confidently for all priorities and goals in the plan and if not - what action can be undertaken to address the gap(s)?

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5. How routinely do we monitor and report on the goals found within our strategic plan?

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6. How do we ensure goals are not “siloesd” to one Superintendent/department?

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7. What evidence do we have of shared ownership across the system for the MYSP?

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