



2016 Strategic Planning Report for School District 53 (Okanagan Similkameen)

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1. BACKGROUND

The Superintendent of Okanagan Similkameen School District 53 (SD53) initiated a strategic visioning process in 2013, which included identification of several main themes (called goals in this round of the initiative). This initiative was re-energized and the strategic planning effort was updated in 2016.

In a full day workshop on Feb. 4, 2016, over 40 participants with representation from Administrators, Teachers, Support Staff, Parents, Trustees and the Union were engaged in an interactive workshop to review and update the SD53's 2013 vision, mission, core values and goals. See Appendix A for a list of participants.

On Mar. 9 and 10, in a two day workshop, a smaller group of 20 representatives (see Appendix B), from the same partner groups, were entrusted to:

- refine the goals from the Feb. 4 workshop,
- further develop associated objectives for each of the goals,
- identify possible critical success factors (CSFs) that must exist or be created to optimize success and barriers that might be getting in the way of success, and
- develop strategies to support the achievement of the objectives and goals over a 7 year period.

Both sets of workshop were intended to generate a collaboration environment, where co-creation was the intention in making a difference and moving forward.

The Superintendent presented the draft Strategic Plan to Administrators on Apr. 28 to solicit their feedback. To address the Administrators' feedback, a subsequent 2-hour meeting was convened on May 24, with 17 of the 20 participants from the March workshops in attendance (see Appendix C) and the draft Strategic Plan was revised.

This report provides a summary of the workshops that resulted into the current 2016-2023 Strategic Plan, and it also identifies the areas of focus that still require further attention as the Strategic Plan evolves.

1.1 Part 1 - Feb. 4, 2016 Workshop

Due to changes in the people involved since 2013, the purpose of this workshop was to re-visit and re-familiarize the work that was completed in 2013. The group was invited to keep the current state in mind while reviewing and updating the Vision Statement (the desired future state of 2023), the Mission Statement (what SD53 does), the Core Values and the Goals (formerly labeled as "Themes" in 2013).

1.2 Part 2 – Mar. 9 and 10, 2016 Workshop

A smaller group representing various stakeholders groups (20 participants) spent two days to develop a Strategic Plan with actionable strategies, and to identify leaders and teams that will facilitate the action items. Target completion timelines still need to be inserted in the Strategic Plan.

1.3 Part 3 – May 24, 2016 Workshop

The Superintendent invited feedback from the Administrators at a meeting held on Apr. 28. On May 24, stakeholder representatives from the March workshop were invited to re-convene to consider and address the feedback from the Administrators.

1.4 How Decisions were Made

The outcomes of these workshops resulted from many interesting and meaningful discussions, challenging questions and inquiries, and participatory group decision-making by consensus. Consensus in the workshops did not necessarily mean unanimous 100% agreement, but enough for the majority of the participants to feel that they are in agreement and can live with and support the decisions made in order to move forward. Participants disagreeing with the group's decisions were given opportunities to share their rationale behind their opposition and were asked to provide an alternative solution to a decision for the group to consider. In this way, all voices were heard and respected.

2. RESULTS

2.1 Vision Statement – “the desired future state”

It was with shared understanding that the Vision Statement:

- paints a picture of the SD53's desired future state,
- is bold, longer term and inspirational (i.e. we are not there yet),
- can stand alone without being attached to or dependent on one person, and
- is relatively easy to remember

The working group came to an agreement that the new SD53 Vision Statement is to:

Be an innovative learning community with strong relationships, partnerships and commitments

2.2 Mission Statement – “who we are”

It was understood that the Mission Statement speaks to “who we are”, and answers the following three questions:

- What does SD53 do?
- For whom does SD53 do its work?
- What are the benefits of this work?

The new SD53 Mission Statement is to:

Provide all learners with relevant experiences that lead to responsible citizenship and life long learning

2.3 Core Values and Guiding Principles – “how we behave”

SD53’s core values remain similar to those identified in 2013.

- Community
- Curiosity
- Respect
- Integrity
- Leadership
- Excellence

Core values are closely tied to Guiding Principles. Guiding principles are behaviours that exemplify and embody how the core values will be lived in the district on a daily basis. Core values and guiding principles are written in the format of:

We believe in [core value], therefore, we will [guiding principles]

We believe in **community**, therefore we will:

- *Include, value and respect others*
- *Create opportunities for collaboration and contributions*
- *Recognize our strengths in diversity*

We believe in **curiosity**, therefore we will:

- *Demonstrate our desires to learn*
- *Challenge preconceived notions*
- *Be reflective and use questions to drive learning*
- *Pursue innovations*
- *Seek to find our passion*
- *Use questions to drive learning*
- *Be courageous in taking risks*
- *Be open to change*
- *Exhibit and demonstrate resilience*
- *Include inquiry in our instructional practices*

We believe in **respect**, therefore we will:

- *Honour ourselves*
- *Treat others with compassion*
- *Seek to understand*
- *Model empathy*

We believe in **integrity**, therefore we will:

- *Do the right thing at all times*
- *Be accountable for our actions*
- *Align our decisions and actions with the values, beliefs and principles that advance everyone’s success*

We believe in **leadership**, therefore we will:

- *Activity participate in shared leadership*

- *Exhibit focus and passion*
- *Recognize that leadership exists to varying degrees and in different ways*
- *Build leadership capacity*
- *Contribute to a culture of excellence*

We believe in ***excellence***, therefore we will:

- *Challenge ourselves*
- *Inspire others to reach their potential*
- *Contribute to a legacy of excellence*

2.4 Goals – “what we want overall”

The “themes” from 2013 were refined to the following four broad goals, the “what we want overall”:

- A. Create a positive culture.
- B. Provide diverse opportunities and experiences for students.
- C. Provide diverse opportunities and experiences for professionals¹.
- D. Enhance positive educational experiences for Aboriginal students.

2.5 Objectives – “the measurable results we want”

For each of the goals, S.M.A.R.T. objectives were co-developed by the working group on Mar. 9 and 10. Objectives describe “the measurable results we want”.

Goals	Objectives
A. Create a positive culture.	<ol style="list-style-type: none"> 1. Sense of Belonging - Increase by 2% per year on the "Most of the Time" measurement on MDI (Gr. 4 & 7) and SS (Gr. 10 & 12) for connectedness using 2015-16 as a baseline. 2. Relationships - Increase by 2% per year on the "Most of the Time" measurement on MDI (Gr. 4 & 7) and SS (Gr. 10 & 12) for relationships using 2015-16 as a baseline. 3. Communications - Increase by 2% per year on the "Most of the Time" measurement on MDI (Gr. 4 & 7) and SS (Gr. 10 & 12) for communications using 2015-16 as a baseline. 4. Safety - Increase by 2% per year on the "Most of the Time" measurement on MDI (Gr. 4 & 7) and SS (Gr. 10 & 12) for safety using 2015-16 as a baseline. 5. Create an individual student data collection system to address the "smallness" of SD53 survey samples.
B. Provide diverse opportunities and experiences for students.	<ol style="list-style-type: none"> 1. Increase co-curricular and/or extra-curricular opportunities and programs district wide for student by 3% over the first two years (starting in 2016-17) to inspire student passion, hobbies and participation outside the classroom.

¹ Professionals include teachers, administrators, support staff and everyone that works in the School District.

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Goals	Objectives
	<ol style="list-style-type: none"> 2. Early Learners - Increase participation district wide by 2% per year in "Strong Start" and "Ready, Set, Learning" using 2016-17 data as a baseline. 3. Beyond Secondary - Increase the number of successful transitions to post-secondary training within 2 years of leaving school by 1% per year based on data collected in 2016. 4. Maintain or increase student participation in non-traditional learning modes (e.g. SSA, Ace it, Work Experiences, Academies, EPIC, Blended, Distance Learning, etc.) by 2% per year using 2016-17 data as a baseline. (Year 1 - 0%; Year 2 - 2%; Year 3 - 2%)
C. Provide diverse opportunities and experiences for professionals.	<ol style="list-style-type: none"> 1. Increase participation of all staff in professional learning opportunities for professional growth by 2% every 3 years based on data acquired in 2016-17 school year.
D. Enhance positive educational experiences for Aboriginal students.	<ol style="list-style-type: none"> 1. Increase Aboriginal student attendance district wide by 3% per year based on 2015-16 data. 2. Increase average % of Aboriginal graduates district wide by 3% for the first two years on 2015-16 data starting in 2016-17. 3. Increase average course success rates for Aboriginal students district wide by 3% for the first two years based on 2015-16 data starting in 2016-17.

2.7 Critical Success Factors and Barriers – the “must have” and “must overcome”

Critical Success Factors (CSFs) are critical conditions that must exist or be created in order to be successful in one or more objectives. Barriers are challenges that stand in the way of success that must be overcome in order to achieve one or more objectives. Both CSFs and Barriers tend to hinder, limit or delay success.

CSFs and Barriers are often overlooked or minimized. Strategies and actions will be more successful if they can overcome one or more of the identified barriers and/or create or maintain one or more of the identified CSFs. It was important for the working group to have spent time in the workshop to identify these important elements of the Strategic Plan.

Appendix D (the complete Strategic Action Plan) shows the details of the CSFs and Barriers for each of the goals and/or objectives developed by the working group on Mar. 9 and 10.

2.8 Strategies – the “so what?” that explains “the how”, “by whom”, and “by when”

Strategies are the actionable items, “the how”, to achieve the goals and objectives. Strategies are not helpful if everybody assumes someone else will do the work. Hence, strategies development included the “by whom” and “by when”, in other words, an identified leader and/or team will commit to leading and coordinating with others to do the work with deliverables within the target timelines.

Typically action items are the first things people can relate to, especially when the goals and objectives are clearly articulated.

More importantly, strategies must address one or more of the CSFs (created or existing) and/or overcome one or more of the Barriers.

Strategies developed by the working group can be found in Appendix D, where the expanded picture of the Strategic Action Plan is laid out.

Unfortunately, with the juicy discussions that ensued during the workshops, there was not enough time to identify the timelines. The School District will have to insert and allow suitable and realistic timelines to complete the strategies.

2.9 Monitoring Program – the “now what?”

The intent of a Monitoring Program includes regular, multiple and pre-scheduled gatherings:

- Inviting representatives from all the working teams to share the progress, successes and challenges of their work;
- Asking tough questions to ensure the plan is on track (on time, on budget, on target? Are results measurable? Are deliverables delivered as expected? Are there more or new CSFs and Barriers? Do timelines need to be adjusted?);
- Providing opportunities to collectively determine if changes to tweak the Strategic Plan are needed to move forward.

It is recommended that at least for Years 1 and 2 of the implementation phase that 2-3 monitoring sessions per year be held, and that at least one person should be identified as the Monitor of the Strategic Plan.

2.10 Celebration of Successes

It is essential to recognize all efforts put into the Strategic Plan, regardless how small or big the successes and progress are. The recognition and celebration aim to:

- Keep the motivation, momentum and energy going
- Appreciate the progress and accomplishment being made
- Nurture the relationships of the people involved

Ideas on how and how often celebrations of successes will be done should be defined by the working groups to optimize inclusion.

3. Strategic Plan 2016-2023

The Strategic Plan 2016-2023 for SD53 in Appendix D should be considered version 1 of this Strategic Plan. No doubt updates to this version will occur as conditions and people change over time, existing programs and initiatives will continue to evolve, and new ones will be created.

It should be noted that the strategies developed thus far are primarily to be implemented in Years 1 to 3 of this 7 year Strategic Plan. Additional and/or adjusted strategies are expected to be part of the regular annual review and update process of strategic planning and based on the results and feedback collected from the monitoring sessions.

It is very gratifying and encouraging to see and experience the positive energy, inquiries and commitment of the participants in the first set of workshop, and the participants in the subsequent sets of workshops contributing to the development of version 1 of the Strategic Plan. Below is a list of words shared by the participants after a full day of hard work on Mar. 9.

- Full (2x)
- Overwhelmed
- Engaging (2x)
- Hopeful (3x)
- Hard
- Enriched
- Mind is full
- Positive
- Challenging
- Great and overwhelming
- Fatiguing
- Processing (3x)

Appendix A

List of Participants at the Feb. 4, 2016 Workshop

School District No. 53 (Okanagan Similkameen)

Strategic Planning - February 4, 2016

Location	Confirmed	Name	Position
CPS	1	Andrea Reichl	Teacher
CPS	1	Carol Church	Teacher
CPS	1	Marty Ring	Support Staff
CPS	1	Shannon Miller	Principal
District	1	Bev Young	Superintendent
District	1	Debbie Marten	Trustee
District	1	Helen Gallagher	District Aboriginal
District	1	Rachel Allenbrand	Trustee
District	1	Susan Trower	Manager of Human Resources
District	1	Terry Collis	District Principal Student Services
OK Falls Elem	1	Amanda Palmer	Teacher
OK Falls Elem	1	Jenna Keyes	Teacher
OK Falls Elem	1	Lisa McCall	Principal
OK Falls Elem	1	Naomi Etty	Support Staff
OK Falls Elem	1	Tim Leochko	Parent
Oliver Elem	1	Belinda Yorke	PAC Chair
Oliver Elem	1	Diane Haddow	Vice Principal
Oliver Elem	1	Karen Sinclair	Principal
Oliver Elem	1	Tammy Dionne	Teacher
Osoyoos Elem	1	Amy Robinson	Support Staff
Osoyoos Elem	1	Dave Foster	Principal
Osoyoos Elem	1	Deb Douglas	Support Staff
Osoyoos Elem	1	Rebecca Bayda	Teacher
OSS	1	Adrienne Mailey	Parent
OSS	1	Bonnie Douglas	Support Staff
OSS	1	John Seminoff	Teacher
OSS	1	Mike Safek	Principal
OSS	1	Natasha Schroeter	Teacher
OSS	1	Penny Duperron	Parent
Presentor	1	Rosanna Von Sacken	Presentor
SESS	1	Cate Turner	Principal
SESS	1	Les Louise	Support Staff
SESS	1	Rick Johnson	Teacher
SESS	1	Scott Tremblay	Vice Principal
SOSS	1	Alanna Waunch	Support Staff
SOSS	1	Audrey Silbernegl	PAC Rep & Support Staff
SOSS	1	Lindsey McVicar	Teacher
SOSS	1	Marcus Toneatto	Principal

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SOSS	1	Rachelle Goncalves	Teacher
SOSTU	1	Sylvia Slater	SOSTU - President
Tuc-el-Nuit Elem	1	Samantha Dunlop	Teacher
Tuc-el-Nuit Elem	1	Shendah Benoit	Principal
Tuc-el-Nuit Elem	1	Susan Fraser	PAC President
YouLearn.ca	1	Glen Heinrichs	Principal
YouLearn.ca	1	Margie Mathieson	Support Staff
YouLearn.ca	1	Sharron Piazza	Teacher
YouLearn.ca	1	Steve Pozzobon	Teacher
YouLearn.ca	1	Will Eaton	Vice Principal

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Appendix B

List of Participants at the Mar. 9 and 10, 2016 Workshop

School District No. 53 (Okanagan Similkameen)
Strategic Planning - March 9/10, 2016

Location	Confirmed	Name	Position
District	1	Bev Young	Superintendent
District	1	Debbie Marten	Trustee
District	1	Myrna Coates	Trustee
District	1	Rachel Allenbrand	Trustee
District	1	June Harrington	Trustee
District	1	Marieze Tarr	Trustee - Chair
OK Falls Elem	1	Lisa McCall	Principal
OK Falls Elem	1	Naomi Etty	Support Staff
Oliver Elem	1	Tammy Dionne	Teacher
Osoyoos Elem	1	Deb Douglas	Support Staff
Osoyoos Elem	1	Jason McAllister	Vice Principal
OSS	1	John Seminoff	Teacher
Presentor	1	Rosanna Von Sacken	Presentor
SESS	1	Scott Tremblay	Vice Principal
SOSS	1	Alanna Waunch	Support Staff
SOSS	1	Lindsey McVicar	Teacher
SOSS	1	Marcus Toneatto	Principal
SOSS	1	Rachelle Goncalves	Teacher
SOSTU	1	Sylvia Slater	SOSTU - President
Tuc-el-Nuit Elem	1	Samantha Dunlop	Teacher
Tuc-el-Nuit Elem	1	Shendah Benoit	Principal
YouLearn.ca	1	Will Eaton	Vice Principal

Appendix C

List of Participants at the May 24, 2016 Workshop

School District No. 53 (Okanagan Similkameen)
Strategic Planning - May 24, 2016

Location	Name	Position
District	Bev Young	Superintendent
District	June Harrington	Trustee
District	Rachel Allenbrand	Trustee
OK Falls Elem	Lisa McCall	Principal
OK Falls Elem	Naomi Etty	Support Staff
Oliver Elem	Diane Haddow	Vice Principal
Oliver Elem	Tammy Dionne	Teacher
Osoyoos Elem	Deb Douglas	Support Staff
Osoyoos Elem	Jason McAllister	Vice Principal
SESS	Scott Tremblay	Vice Principal
SOSS	Alanna Waunch	Support Staff
SOSS	Lindsey McVicar	Teacher
SOSS	Marcus Toneatto	Principal
SOSS	Rachelle Goncalves	Teacher
SOSTU	Sylvia Slater	SOSTU - President
Tuc-el-Nuit	Shendah Benoit	Principal
Tuc-el-Nuit	Samantha Dunlop	Teacher

Appendix D

SD53 2016-2023 Strategic Plan, v.1 Year 1-3