

Federation of Independent School Associations in BC



# Strategic Plan 2017 to 2020



Approved by

**FISA Board of Directors**

June 28, 2017



# Federation of Independent School Associations in BC Strategic Plan to 2020

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# Introduction

FISA is approaching the end of a five-year Strategic Plan that is scheduled to expire in 2018. In 2016, the organization celebrated its 50<sup>th</sup> Anniversary with a convention involving all five associations of FISA. Over 5,000 independent school professionals participated in this two-day event, resulting in very favourable reviews from over 100 respondents who voluntarily sent notes of appreciation to FISA.

The FISA Board of directors met on February 24, 2016 to debrief on the value of the convention. Again, the overall opinion was positive with several suggestions that this event should be repeated in five or ten years. If FISA were to provide a convention to all five associations on a regular basis, that would be a shift in the services that it has been providing as outlined in the 2013-2018 Strategic Plan. Before the board considers moving into another level of service for its associations and member schools, it was decided that the board convene a retreat\* to refresh the current strategic plan considering the success of the February 4-5, 2016 Anniversary Convention.

The following motion was adopted: That the FISA Board hold a two-day retreat in January 2017 to review and renew the current strategic plan. CARRIED.

*(\*The retreat took place on February 20-22, 2017)*



## Our Strategic Team



### The Strategic Planning Team consisted of:

Phil Hills	<i>Executive Director</i>	ACSIBC
Stuart Morris	<i>Principal</i>	ACSIBC
David Neufeld	<i>Assistant Executive Director</i>	ACSIBC
Arnold Grimm	<i>Principal (Waldorf)</i>	AMG
Harry Moes	<i>Educational Consultant</i>	AMG
Corazon Pabo	<i>Vice-Principal (Sikh)</i>	AMG
Don Pacht	<i>Head of School (Jewish)</i>	AMG
Lloyd Robinson	<i>Superintendent</i>	SDA-AMG
Doug Lauson	<i>Former Superintendent</i>	CIS
Sandy Marshall	<i>Assistant Superintendent</i>	CIS
Bev Pulyk	<i>Superintendent</i>	CIS
Phil Graham	<i>Business Administrator</i>	ISABC
Elizabeth Moore	<i>Executive Director</i>	ISABC
Maureen Steltman	<i>Head of School – SES</i>	ISABC
Charles De Jager	<i>Lawyer</i>	SCSBC
Dave Loewen	<i>Superintendent</i>	SCSBC
Ed Noot	<i>Executive Director</i>	SCSBC
Peter Froese	<i>Executive Director</i>	FISA
Magda Hogewoning	<i>Executive Assistant</i>	FISA

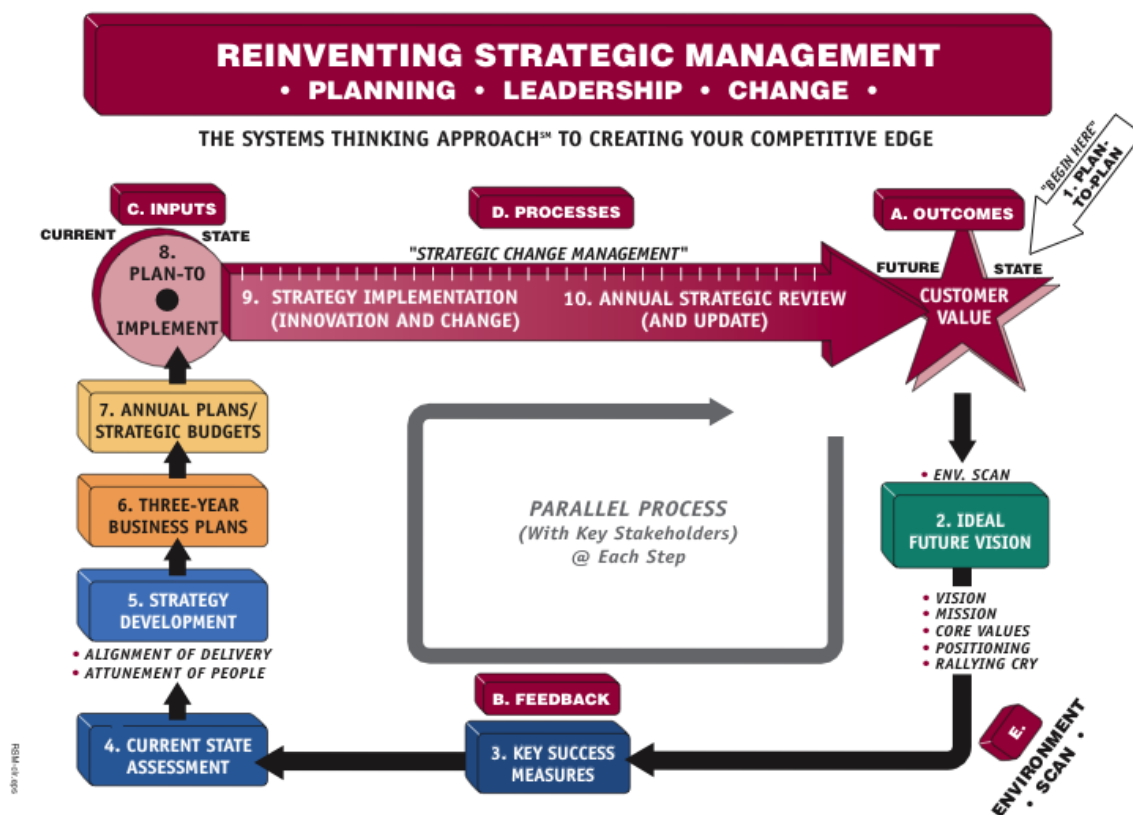
We also want to thank Jim McKinlay, President of the *Centre for Strategic Management Inc.* for his assistance in guiding FISA through the steps of this Strategic Planning Process.

# The Strategic Planning Process

Our strategic planning project followed a process that was developed by the Centre for Strategic Management. It has been applied to public sector projects throughout Canada and the USA since 1990 and there are many examples of its application within municipal government settings. This model is built upon the basic principles of the “Systems Thinking Approach”. The five key elements of this approach are:

- A. **Outcomes** – Where do we want to be at some specific point in the future?
- B. **Feedback Loop** – How do we know if we are on track or not?
- C. **Inputs** – Where are we today, in the present state?
- D. **Throughput Process** – What changes do we need to implement to close the gap between where we are today and where we want to be in the future?
- E. **Environment** – What’s happening around us that will impact on our plan?

The ten-step Reinventing Strategic Planning Model below merely expands on each of these five steps and adds a bit more detail for each of these five factors.



5th Edition • Adapted from General Systems Theory, and Haines Associates, our experiences, a "Best Practices" literature search, and client feedback.

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# Environmental Scanning

The first step in strategic planning is to scan the environment – to observe what trends and events are occurring around us – that are outside of our control – yet may well have a profound impact on the plan we are developing.

This was done by surveying the Board on their assessment of three questions:

- 1) What do you think that FISA is doing well?
- 2) What do you see as areas for growth or improvement in the next 3-5 years?
- 3) Consider how we could address the growth areas over the next 3-5 years?

## Strengths

The responses indicated that FISA is doing a good job in advocating for independent school funding as well as securing administered funds such as Professional Development funding for the New Curriculum, Coding, French grant, FSA marking/training, Dry Grad funding, and Artists in Education. The work on funding was recognized by all respondents. Almost as strongly acknowledged was the work that FISA is doing in developing positive relationships with members of the cabinet, MLAs and senior members of the bureaucracy.

There is general support (6-7 responses) for the role FISA is playing in media relations and FISA's representation of independent schools.

Communication on the work of FISA and working with our education partners also received general support.

Several board members cited policy development and board relations as attributes that were also seen as strengths.

## Growth Areas

Growth areas were not as overwhelmingly identified by the Board as were the strengths. However, four areas were given general acknowledgement for further work. These included strengthening our work with the media in shaping public opinion about independent schools, strengthening our involvement in professional development, providing more research information, and supporting the smaller schools with additional policy development.

A few respondents (3-4) suggested that FISA needed to give more attention to social media, explore new funding models and strengthen our public relations policy to better inform our schools about the work of FISA. Staffing levels within the FISA organization were also identified as an area that needs attention.



## Remedies to Growth Areas

There were numerous suggestions made to address FISA's growth areas but the majority received the support of only one or two directors. However, an overwhelming number (14) indicated that staffing levels needed to be addressed within the FISA organization. Some suggested that contracting external agencies to complete specific duties would be a solution, others identified the need to provide an assistant for the executive director and still others felt that committees should be struck to address the expanding role of FISA. If FISA were to expand its role in professional development, additional support staff would also be needed.

## Opportunities for FISA in the Next 3-5 Years

In addition to the survey completed by board members prior to the retreat, the directors also considered what opportunities were evident over the next three years.

*The following list summarizes the opportunities in order of most popular to less popular.*

- FISA can demonstrate its unity within its diversity as a Federation of five distinct associations, and communicate this to our schools, the media, government, and our education partners as one of the strengths of independent schools. (14)
- As FISA continues to engage with our education partners in the public sector, and with the Ministry of Education, we have a voice in the development of curriculum, policy, and Legislation. (10)
- As independent schools, we can be innovative with the various curricula we offer our students. (9)
- An election is occurring on May 9, 2017, giving independent schools an opportunity to inform political candidates and the public about the value of choice in education being offered by independent schools. It is also an opportunity to re-affirm proportional funding for independent schools. (8)

*The following opportunities were selected by four or fewer directors:*

- Consider developing a new funding formula that may be more beneficial to independent schools than the current funding formula.
- Our ability to be flexible in circumstances that we face and to react quickly to environmental factors is an opportunity for independent schools.
- The modernized curriculum gives independent schools a significant opportunity to showcase what many schools are already doing.



- We can serve the common good by contributing to the communities in which we live.
- Independent schools tend to operate independently and often miss opportunities to profile the success stories of their schools.
- Research, opportunities for leadership within FISA, and immigration were also identified as opportunities.

## Threats to FISA and Independent Schools

The most commonly identified threat to independent schools was a loss, reduction, or a change in the funding formula by the government (11).

This was followed closely by a concern that our schools might become complacent in monitoring and protecting the gains that independent schools have made regarding recognition and funding (10).

Equally important was a concern over the changes in leadership within FISA. Several directors, officers, and senior staff are retiring in the next two years, emphasizing the need to implement a succession strategy that will identify capable people to carry on the vision of FISA while preserving the institutional memory of the organization (10).

As individuals and organizations attack independent schools in the media, it is important that FISA develop relationships with members of the media so that an independent school perspective is also documented and heard (6).

Independent schools should also engage with the public sector to demonstrate that our schools serve a common good. Isolation from the public sector was viewed as a threat (5).

Changes in government, either by the governing party or within the bureaucracy can add to the challenges of FISA (4). We will always have the detractors from within the BCTF who oppose public funding of independent schools. However, inaccurate or misrepresented information about independent schools that is presented as research is problematic (3).

Finally, the global economy and the political reality in the US have the potential of impacting independent schools. Most recently, the Supreme Court of Canada ruling on the class size and competition has resulted in the hiring of approximately 2,500 new teachers in the public sector, impacting independent schools through a lack of TOCs, as well as teachers leaving independent schools for better paying jobs or pension plans in the public sector.

# Vision Statement

*\*A vision statement  
will be revisited and  
developed at some  
future date.*

***FISA's Tagline:***

*"Freedom Involves  
Secure Alternatives"*

A Vision Statement is an idealistic view or image of what we want our future to look like at a certain future point in time. It has dreamlike qualities, future hopes and aspirations, even if they are never fully attainable. It is an energizing and inspiring statement of where and what we want to be in the future.

Visioning is a process that enables us to put reason aside – temporarily – and look beyond the present to the future, as we would like it to be. "It can't be done" is irrelevant. How to turn a vision into a reality is something that happens after the vision is created.

A Vision must be:

- Leader initiated
- Shared and supported
- Comprehensive and detailed, positive, and inspiring – it is a reach, a challenge.



# Mission Statement

Our Mission Statement is more pragmatic than the Vision Statement. It is more realistic, more focused, and more achievable – by design.

It describes our unique purpose and outlines the business we are in, without listing the activities that we carry out.

The Mission Statement provides answers for three specific questions:

- **Why do we exist?** What's our reason for being?
- **What do we produce and provide?** – in benefit and outcome terms.
- **Who do we serve?** Who are our customers and clients?



Queen Margaret's School

*With a united voice,  
FISA  
Advocates for  
Parental Choice,  
Recognition and  
Funding;  
Supports Independent  
School Associations in  
Their Pursuit of  
Excellence;  
Strengthens  
Educational Practice;  
And Contributes to the  
Public Good.*

*Core Values are the fundamental beliefs that we hold about how we should act while accomplishing our mission and conducting our business.*

*These form the principles that guide our daily behaviours. The way we apply our core values will contribute to our overall public image as an organization. This will help others to form their impressions of us, based on how they are treated by our staff.*

*Our core values describe what we believe in and how we will act at work – with our customers and clients, as well as with each other.*

*These values come as a complete set – we cannot pick and choose which ones we want to honour. We are expected to honour, practice and live each of these values – all the time.*

# Core Values

*We believe in...*

## **Choice**

- The right of parents to choose an education that is appropriate for their children.

## **Diversity**

- Respecting diversity and defending the right of school communities to define themselves according to their values.

## **Collaboration**

- Strengthening understanding and cooperation with all education stakeholders. We value rational, thoughtful, and collaborative approaches in dealing with member associations, government and provincial education partners.

## **Common Good**

- The value of our contribution to the common good in a democratic and pluralistic society.

## **Excellence and Innovation**

- Celebrating the pursuit of excellence and innovation within independent school communities.

## **Respect**

- Safe and respectful school environments that empower individuals to strive towards their full potential.



St Margaret's School

# FISA BC – Current State Assessment

May 2017

FISA has focused on strengthening its relationship with its education partners and government. We believe that by engaging with our education partners, we dispel the myths that independent schools are isolated education communities that serve only their own purposes. The same applies to our engagement with the bureaucrats and elected officials within government. FISA has gained the reputation of providing a rational and reasonable perspective on policy and legislative issues that are being considered by government. This has given independent schools a voice in shaping educational policy on issues such as curriculum, harassment and bullying prevention, tax exemption, grant payment orders and proportional funding for independent schools.

The election on May 9, 2017 has introduced a new political climate in British Columbia. The two leading parties, Liberals and NDP, have split the popular vote with an almost equal percentage of support from the electorate, leading to a potential minority government with the Liberals holding 43 seats, the NDP with 41 and the Green party with 3 seats. A majority government would require 44 seats out of 87 ridings.

The challenge for FISA under the current circumstances is the uncertainty of knowing which party will form government. All three parties have indicated that they will continue to support the 50% and 35% funding allocation for independent school operating grants but proportional funding on additional operating funding is not as clearly defined for all political parties.

Political uncertainty will shape the political agenda for independent schools over the next three years. A change in government will lead to a significant change in the political direction for FISA because new relationships will need to be established within the bureaucracy, elected MLAs, and Ministers.

It is important that independent schools continue to provide educational excellence in schools across this province. While there may be political uncertainty, we cannot deviate from the primary purpose of independent schools providing families with exceptional educational choices within the shared philosophical, pedagogical and/or faith values of the home and school.



*Goals are the basic approaches we use to guide individual and organizational behavior towards the achievement of our organization’s vision and mission.*

*Goals are also seen as the major way or method or group of activities that we use to guide us in “bridging the gap” over the life of our strategic plan – from our Current State Assessment (where we are today) to our Ideal Future State (where we want to be in the future).*

*By design, we have a limited number of goals to ensure that our staff have a focused approach to delivering the services expected by our stakeholders.*

*Since these are “core” goals, the activities included under each strategy are core to our operations – and every director and association is expected to identify specific ways in which they can contribute to the achievement of each goal. None of the core goals are targeted at any single individual – it is the collective contribution of the whole organization, working together that enables us to successfully implement our Strategic Plan.*

# Goals

## Goal 1

**Develop a Provincial Strategy that will demonstrate how independent schools contribute to the common good.**

## Goal 2

**Effective Governance and Operations: Develop a proactive succession strategy for FISA to address personnel transitions over the next five years.**

## Goal 3

**Funding: Develop a position on independent school funding that is most beneficial to school authorities.**

## Goal 4

**Conduct surveys and research topics that address educational practice and policy issues important to independent schools.**

## Goal 5

**Develop policy and best practice guidelines for independent schools that are applicable to all Associations within FISA.**

## Goal 6

**Strengthen FISA’s relationship with Provincial education partners (PEGs), the Ministry of Education and elected MLAs.**

## Goal 1      Develop a Provincial Strategy that will Demonstrate How Independent Schools Contribute to the Common Good

OBJECTIVES	PERFORMANCE MEASURES
<b>1. Research and gather data regarding public engagement of individual schools.</b>	<ul style="list-style-type: none"> <li>• Develop a database of stories from independent schools.</li> <li>• Identify and act on new areas of research (surveys, reports, etc.).</li> <li>• Identify opportunities for partnership and engagement in Professional Growth.</li> </ul>
<b>2. Analyze political and social landscape on attitudes and perceptions about independent schools.</b>	<ul style="list-style-type: none"> <li>• Review current data on the contributions of independent schools.</li> <li>• Prioritize key opportunities?</li> <li>• Develop key relationships including the media, both traditional and social.</li> </ul>
<b>3. Develop plans and tool kits for:</b> <ol style="list-style-type: none"> <li><b>Communicating with our own constituency</b></li> <li><b>Communicating with the media</b></li> <li><b>Board approved Professional Growth and Development</b></li> </ol> <p>- Upon association agreement, FISA will pursue a celebratory convention involving all five associations every 10 years. The next convention would occur in 2026.</p>	<ul style="list-style-type: none"> <li>• Prepare information for independent schools on how they serve the common good.</li> <li>• Establish connections with people in the media that can provide a voice for independent schools.</li> <li>• The Board will form a committee to plan a provincial convention on a theme to be determined at that time.</li> </ul>
<p>- Professional learning is the responsibility of the associations. FISA will be involved when the Ministry of Education provides professional learning funding that benefits all independent school associations, such as ERASE training, computational thinking, curriculum modernization, leadership development.</p>	<ul style="list-style-type: none"> <li>• Collaborate with the MoE and the Independent Schools Branch when Ministry funding is provided to support professional learning for independent schools.</li> </ul>



## Goal 2      Develop a Proactive Succession Strategy for FISA to Address Personnel/Policy Transitions over the Next 5 Years

OBJECTIVES	PERFORMANCE MEASURES
<b>Governance and Operations:</b> <b>1. Operations and Staffing</b> a. Evaluate current job descriptions and responsibilities considering the skills FISA will require in the future, then staff accordingly.	<ul style="list-style-type: none"> <li>Review staff roles and responsibilities.</li> <li>Hire a senior administrator immediately.</li> <li>Hire a 0.5 FTE accounting support staff.</li> <li>Post for an executive director in Spring, 2018.</li> <li>Review FISA fees for 2018-2019 and following years.</li> </ul>
<b>2. Governance and Operations</b> a. Develop a plan to address governance and operations issues over the next three years.	<ul style="list-style-type: none"> <li>Review and amend the Constitution and Bylaws to bring them into compliance with existing practice and the new Societies Act.</li> <li>Have associations review the changes to the amended Constitution and Bylaws.</li> <li>Seek Board approval of the C &amp; B.</li> <li>Conduct an annual scan of the C &amp; B to ensure organizational compliance.</li> <li>Implement a mandatory review of the Constitution and Bylaws every five years.</li> </ul>
<b>3. Board Orientation:</b> a. Engage in orienting new and perspective board members to the culture, purpose, and function of the board after they are seated on the FISA board.	<ul style="list-style-type: none"> <li>Orient new members after each AGM.</li> <li>Provide a board orientation package including manual, explanation of the role of a board member and an orientation checklist.</li> </ul>
<b>4. Board Recruitment, composition, and succession</b>	<ul style="list-style-type: none"> <li>Use FISA's Succession Policy to address board and staff transitions</li> <li>Suggest qualities/skills desired in new board members.</li> </ul>

### Goal 3 Develop a consensus position on independent school funding.

OBJECTIVES	PERFORMANCE MEASURES
1. Research existing funding models and develop a position of new funding models	<ul style="list-style-type: none"> <li>Research funding models in countries where independent schools are part of the education system.</li> </ul>
2. Develop a position regarding new funding sources.	<ul style="list-style-type: none"> <li>Develop a list of funding models for review by the Funding Committee and Board.</li> </ul>
3. Meet with DL school administrators, DL Committee, MoE representatives and the FISA Funding Committee to develop a position for DL funding.	<ul style="list-style-type: none"> <li>Develop a DL funding proposal that is supported by FISA and the MoE.</li> </ul>
4. Determine a strategy to support independent schools that enroll Reserve First Nations students with identified special needs.	<ul style="list-style-type: none"> <li>Provide independent schools that enroll Reserve First Nations students with information on how and to what extent the bands are funded.</li> </ul>

### Goal 4 Conduct Surveys and Review Research that Addresses Educational Practice and Policy Issues that are Important to Independent Schools

OBJECTIVES	PERFORMANCE MEASURES
1. Identify and conduct research in areas of value and interest to FISA and its members.	<ul style="list-style-type: none"> <li>FISA will conduct two or more surveys per year on issues that are or could have a financial, curricular, operational, or regulatory impact on independent schools.</li> </ul>
2. Include current information on educational research in every FISA quarterly newsletter.	<ul style="list-style-type: none"> <li>FISA will provide one research article in each newsletter that addresses either survey research or academic papers that address current issues impacting independent schools.</li> </ul>

<b>3. Directors and Leaders will keep current by attending conferences and conventions, and by sharing relevant information to members.</b>	<ul style="list-style-type: none"> <li>• Representative of the FISA board and /or senior staff will attend at least on national convention, such as CAPSLE, each year.</li> <li>• The Executive Director and/or designate will attend association conventions, retreats and administrative meetings upon requests, and share information on the work of FISA.</li> </ul>
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### **Goal 5**      **Develop Policy and Best Practice Guidelines for Independent Schools that are Applicable to all Associations.**

OBJECTIVES	PERFORMANCE MEASURES
<b>1. Continue to develop policy and best practice guidelines as needs become apparent.</b>	<ul style="list-style-type: none"> <li>• Prepare policies as requested by the FISA Board of Directors.</li> </ul>
<b>2. Review existing FISA policies that may need revisions.</b>	<ul style="list-style-type: none"> <li>• Complete an annual policy review to determine where revisions are needed.</li> </ul>

### **Goal 6**      **Strengthen and Develop FISA's Strategic Relationships**

OBJECTIVES	PERFORMANCE MEASURES
<b>1. Ensure FISA representation at conventions and conferences of educational organizations and political parties.</b>	<ul style="list-style-type: none"> <li>• Representatives of the FISA board and/or senior staff will attend at least two conventions/AGMs involving our education partners each year.</li> <li>• The Executive Director or designate will attend at least one political party convention each year, with the goal of attending each BC political party's convention once every two years.</li> </ul>

<p><b>2. Create a schedule of regular touch points with key government officials and education partners.</b></p>	<ul style="list-style-type: none"> <li>• The Executive Director and or designate will communicate with the Independent Schools Branch and/or Ministry of Education staff on a weekly basis.</li> </ul>
<p><b>3. Encourage and facilitate individual school authorities to engage with local stakeholders and politicians.</b></p>	<ul style="list-style-type: none"> <li>• FISA will attempt to have the Minister of Education, DM and ADM attend at least one FISA board meeting each year.</li> </ul>
<p><b>4. Promote independent school education to the voting public.</b></p>	<ul style="list-style-type: none"> <li>• FISA will annually remind independent school authorities to engage with their MLAs and municipal representatives at least once during the four-year term of the provincial government.</li> <li>• FISA will provide information on its website that will address the value of independent school education to citizens of BC. This will include videos, blogs, and articles in the quarterly newsletter.</li> <li>• The Executive Director will accept invitations to speak at post-secondary institutions, and other community events on the value of independent school education.</li> </ul>



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