

OHIO SCHOOL
BOARDS ASSOCIATION



VISIONARY INITIATIVES
FOR STRATEGIC ACTION

Letter from the presidents


Just as public education is at a crossroads, so is our association. We can be satisfied with where we are, or set our sights on a brighter future. We choose the latter.

This report on OSBA's new strategic plan represents thousands of hours of thought-provoking discussions, research and hard work by the Visionary Initiatives for Strategic Action (VISA) Team. The team – made up of 10 school board members and 10 staff members – began its work on a new strategic plan in September 2007. Along the way, many other board members and the entire OSBA staff made significant contributions to the effort, and continue to do so.

To create this member-driven plan, the VISA Team collected information from hundreds of stakeholders, including board members; school administrators; statewide education associations; legislators and other state officials; organized labor; local government groups; and OSBA staff.

The Visionary Initiatives for Strategic Action contained in this report set the goals that clearly define OSBA's leadership role in public education. Staff members – organized into goal teams – are creating and refining actions to fulfill our vision of a better future for our students, schools, districts and association. The Board of Trustees and staff members will regularly monitor the plan's progress.

We not only must dream together, we must prepare ourselves to act together.



Edward A. Bischoff
2008 OSBA president,
and member of the
Delaware-Union ESC
Governing Board and
Delaware Area Career Center
Board of Education



Martha F. Rothey
2007 OSBA president,
and former member of the
Findlay City Board of Education

Strategic plan overview

OSBA's new strategic plan is the product of thousands of hours of effort on the part of association members and staff. Board-member driven, the plan is a living document designed to guide OSBA now and into the future as it works to support Ohio's public school boards. Following is a brief summary of how the plan came to fruition.

In November 2006, the OSBA Executive Committee instructed Executive Director Richard Lewis to review the association's long-range strategic plan, which had been approved by the Board of Trustees in 2000.

Knowing that trustee involvement and commitment would be essential to strategic planning, OSBA leaders discussed the project at the January 2007 governance meetings. At that time, the Executive Committee developed a charge to be given to a planning team, which would be appointed by the OSBA president. The team's charge was to:

- re-examine the OSBA mission statement;
- review the current strategic plan and process;
- assess the association's current and future needs;
- devise a mechanism to keep the Board of Trustees informed about the planning and improvement process;
- include the results of the 2007 NSBA Operations Audit in discussions.

Later that year, President Martha F. Rothey, a Findlay City board member, appointed a strategic planning team of 10 school board members and 10 staff members, including one regional secretary. The Executive Committee selected Sue Waechter of Cornerstone Consulting Associates LLC to facilitate the process.

The planning group first convened on Sept. 14, 2007, and adopted the name, Visionary Initiatives for Strategic Action (VISA) Team. The VISA Team continued to meet over the next seven months, with members working on individual and small-group assignments between sessions.

The process relied heavily on both internal and external stakeholder input through personal interviews, surveys and assessments. Internally, the team gathered feedback from OSBA members and staff. External stakeholders included statewide education organizations; the governor's office; state legislators; the Ohio Department of Education; local government associations; and organized labor.



The team also conducted comprehensive analyses of OSBA current and past programs, products and services; previous strategic plans; and the association's infrastructure and capabilities. Synthesizing all this data, the group created a solid foundation from which to set a course for the future, and passed the plan to the staff for implementation.

This publication outlines the major features of the plan: OSBA's new mission and vision statements; guiding principles; and vision priorities and goals. The vision priorities describe the differences between where OSBA is today and where it wants to be in the future. Also included are details on how the plan will move forward, as well as a list of VISA Team and 2008 Board of Trustees members.

Full summaries of the team's meetings and a historical synopsis of previous OSBA organizational plans are available on the association's Web site at www.osba-ohio.org/VISA.htm.

Moving forward with a vision

OSBA's Visionary Initiatives for Strategic Action plan is designed to be dynamic, flexible and adaptable to the evolving needs and challenges of public education. As such, OSBA trustees and staff will regularly monitor the plan to keep it synchronized with the needs of association members as they strive to provide the best education possible for their students.

The current set of 23 goals reaches out five years into the future. Every OSBA staff member is assigned to a goal team charged with devising strategies to best achieve each goal and monitor its progress. Goals may be added to the list, while some might be dropped or consolidated. Staff members are guided by a goal prioritization matrix that identifies the sequence in which goals will be tackled. A specified set of goals will be addressed each year.

A detailed monitoring process is in place to maintain the focus on OSBA's mission and vision. That process calls for:

- regular staff reviews of the strategic plan;
- annual, formal updates of the plan that indicate what goals have been completed, dropped or added;
- reviews of the mission statement, vision statement and vision priorities to ensure that they remain relevant;
- orienting new OSBA trustees and staff to the plan, its history and importance;
- keeping constituents up-to-date on progress and changes through newsletters, e-mails, the OSBA Web site, and at meetings and conferences;
- soliciting constituent input on the plan;
- making the plan available on the Web site;
- providing a strategic plan update at every Board of Trustees meeting.

OSBA's overarching goal in creating the strategic plan was to set in motion a proactive, far-sighted process to support its mission of providing the best service possible for Ohio's public school boards.

That process is now moving forward.

With the ongoing commitment and dedication of the entire OSBA family – board members and staff alike – the strategic plan will continue to forge ahead and support us as we face the formidable challenges of public education leadership in the 21st century.





Mission

OSBA leads the way to educational excellence by serving Ohio's public school board members and the diverse districts they represent through superior service and creative solutions.

Vision

OSBA is the recognized and respected voice of public education, leading through demonstrated expertise, active and engaged membership, and superior service in a competitive, global environment.

Guiding Principles

The Guiding Principles are the attitudes, mind-sets or beliefs about how work should be accomplished within our organization and how people should act as they work toward accomplishing OSBA's vision.

We value and expect effective communication. Therefore:

- ◆ We will ensure all members and staff are made aware of and have access to the best possible information in a timely manner.
- ◆ We will solicit input from all internal and external stakeholders.
- ◆ We will use multiple methods of communication to reach a wide variety of audiences.

We value and expect integrity. Therefore:

- ◆ We will interact with others in a respectful and honest manner.
- ◆ We will provide appropriate and reliable information.
- ◆ We will be trustworthy and keep promises and commitments.

We value and expect collaboration and partnership. Therefore:

- ◆ We will facilitate understanding and agreement among partners.
- ◆ We will not allow disagreements to impact our overall relationships.
- ◆ We will creatively seek and nurture relationships with those who shape the future of education.

We value and expect superior customer service. Therefore:

- ◆ We will be responsive, courteous and timely.
- ◆ We will find or provide resources to meet customers' needs.
- ◆ We will monitor and continuously improve customer satisfaction.

We value and foster expertise. Therefore:

- ◆ We will cultivate visionary leadership across the association.
- ◆ We will hire, retain and value highly qualified staff.
- ◆ We will provide time and resources to develop association leaders, members and staff.



Vision Priorities

The OSBA Vision Priorities, as adopted by the Board of Trustees, are:

Vision Priority: *Our members want to participate in OSBA programs, activities and governance, and actively advocate for public education.*

Goals:

- ◆ We will expand efforts to educate members on how to become involved in OSBA governance and committees.
- ◆ We will develop creative incentives to encourage active participation from our membership in cost-effective ways.
- ◆ We will analyze the structure of regional leadership responsibilities for ways to expand member participation at the regional and state levels.

Vision Priority: *We are a pivotal player in the political and educational arenas.*

Goals:

- ◆ We will explore the feasibility and purpose of a think tank and foundation.
- ◆ We will expand Kids PAC and the potential for endorsing candidates.
- ◆ We will educate members on the importance of their participation in the statewide policymaking process.

Vision Priority: *Our infrastructure, processes and resources are sustainable, flexible and dynamic to support mass customization.*

Goals:

- ◆ We will identify our core services.
- ◆ We will evaluate the current staffing structure to assess expertise and capacity.
- ◆ We will establish a comprehensive staff orientation program to reflect OSBA's history; current programs; philosophy of empowerment; and customer service, and to outline to whom we provide service.
- ◆ We will create an expectation for, and a system that, encourages collaboration to expand resources from outside the association.
- ◆ We will create a technology improvement program to include staff and member training, member participation, expanded technology opportunities and enhanced customer service.
- ◆ We will proactively ensure training and technology opportunities to remain current in the field.



Vision Priority: Our members receive superior services optimizing the value of their membership.

Goals:

- ◆ We will develop a comprehensive feedback plan to measure the value of membership.
- ◆ We will define the group (staff and members) that will develop meaningful, standardized criteria for value assessment of individual services and to assess the comprehensive feedback.
- ◆ We will create a comprehensive process to evaluate member needs.
- ◆ We will define ongoing staff development that is responsive to staff members as well as organization needs.



Vision Priority: Our outreach efforts ensure collaboration and participation with any individual or organization that shapes the future of education.

Goals:

- ◆ We will develop a continuous process to identify and evaluate current and potential relationships with individuals and organizations that affect education policy.
- ◆ We will increase OSBA's visibility.
- ◆ We will create customized, accessible communication for members and stakeholders.

Vision Priority: We effectively communicate with staff, members and stakeholders for the exchange of ideas and sharing of information.

Goals:

- ◆ We will periodically conduct a communications audit and implement changes.
- ◆ We will create/formalize a process to receive and relay information to all staff and members.
- ◆ We will consider "members only" and "staff only" sections on our Web site.
- ◆ We will create clarity by identifying and prioritizing stakeholders and members, and the order in which they will be served.

VISA Team

School board members

Edward A. Bischoff, Delaware-Union ESC & Delaware Area Career Center
Andrew Herchek, Waterloo Local (Portage) & Maplewood Career Center
Cathy Johnson, South-Western City
Kevin A. Johnston, Preble County ESC
Tawana Lynn Keels, Princeton City & Great Oaks ITCD
Linda F.R. Omobien, Akron City
John Pennycuff, Winton Woods City
Ed A. Penrod, Logan-Hocking Local (Hocking)
Martha F. Rothey, formerly of Findlay City
Dr. Steven Steel, Toledo City

OSBA staff

Julia A. Bauer, staff attorney
Rob Delane, deputy executive director & director of school board development
Ron Diver, Southwest Region secretary
Michelle Francis, legislative specialist
Kathy LaSota, deputy director of search services and board development
Richard Lewis, executive director
Jill R. Meinhardt, policy specialist
Judy Morgan, secretary of school board development
Gary Motz, communications specialist
Janice Smith, chief financial officer

Adopted by the OSBA Board of Trustees, May 17, 2008

Walter S. Armes, Whitehall City
Gary L. Baker II, Columbus City
Edward A. Bischoff, Delaware-Union ESC & Delaware Area Career Center
Michael L. Collins, Westerville City
Reno Contipelli, Cuyahoga Heights Local (Cuyahoga)
Marie D. Dockry, Mahoning County ESC & Mahoning County Career & Technical Center
Sandra Griggs, Wauseon EV
James Hardy, Akron City
Lisa Ann Hatfield, Otsego Local (Wood)
Robert M. Heard Sr., Cleveland Municipal
Andrew Herchek, Waterloo Local (Portage) & Maplewood Career Center
Catherine D. Ingram, Cincinnati City
Cathy Johnson, South-Western City
Kevin A. Johnston, Preble County ESC
Tawana Lynn Keels, Princeton City & Great Oaks ITCD
William T. Kerr, Steubenville City & Jefferson County JVS

Susie Lawson, Tri-County ESC & Wayne County Schools Career Center
Dr. Paul R. Lockwood II, North Point ESC & EHOVE Career Center
Lester Marrison, Ashtabula County ESC & Ashtabula County JVS
Charlotte S. McManus, Vinton County Local (Vinton)
Katie McNeil, Middletown City & Butler Technology and Career Development Schools
Donna J. Myers, Northwestern Local (Clark) & Springfield-Clark Career Technology Center
Ruth M. Nau, Noble Local (Noble)
Ed A. Penrod, Logan-Hocking Local (Hocking)
Jim Perdue, Reading Community City & Great Oaks ITCD
Martha F. Rothey, formerly of Findlay City
Randy Smith, Forest Hills Local (Hamilton)
Dr. Steven Steel, Toledo City
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