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ABSTRACT
                In analyzing the managerial decisions at the central
office of the Dufferin (Ontario) county board of education, this
project sought to obtain the data needed to design an integrated
management information system. A major component of the study was
identifying users and their information needs and relating
information to three different levels of decision-making: operational
control, management (tactical) control, and strategic planning.
Intensive interviews with board officials, superintendents, and
elementary and secondary principals, along with the compilation of
lists of major decision functions, provided the data for the study,
which includes analyses of both board- and school-level
decision-making. Among the results of the study were a systems
analysis of the board's activities, an integrated, comprehensive list
of functions and specific areas of decision-making, and the
identification of information channels that contribute to decisions
at the central office. Appended are lists of joint and individual
decision functions of board members and principals, their information
needs, and flow charts. (Author/WD)

FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND

MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume I: Project Description

Susan Padro

March, 1977

Department of Educational Planning

THE ONTARIO INSTITUTE :   STUDIES IN EDUCATION

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PREFACE

The author wishes to acknowledge all those who contributed
to the outcomes of this study. To the Director of the Dufferin
Board of Education, Scott Roliff, she is particularly indebted for
his enthusiastic support of the project. In terms of the many hours
taken out of an already overburdened schedule to participate in
intensive interviews and in terms of the keen insights he contributed
about the operations and needs of the board, his contribution has
been invaluable. His active participation served to set the guide-
lines for the direction of the project and to enlist the cooperation
of the entire staff of the Board.

The author is grateful to the Board's Superintendents,
Murray Young, Stan Robinson and Roy Brand,for the contribution of
their time and energy to the many hours of intensive interviews and
analysis necessary for the completion of this project. Without their
excellent cooperation, this study could not have been possible. Thanks
are also extended to Ms. Mavis Wilson, Administrative Assistant at the
Dufferin Board of Education during the course of most of this study,
who provided the study team with large amounts of necessary information.
Her loss to the project was most unfortunate and presented a severe
setback to its completion.

At the level of the schools, the author would like to thank
all the principals, elementary and secondary, for their contribution
to the project. Without exception, they completed a very difficult
and time-consuming task admirably.

INT: ___TION

An i__ __ _or system is defined as a network of communication
channel __ _nt ___s, processes, stores, retrieves __ redistributes
data for the ___ dual and collective decision making process. A
Management ___ tion System (MIS is one that supports ___ al
cision __ supplying relevant information when required. The
_ic pur se _ MIS are to:

- _ro _ _imely information to management
- _i_ _e allocation of resources
- _d _ _he selection of alternatives

__ suppl __ ___vant, reliable and timely information upon which to
base de ___ons

_F_ECTI__ AND SC__E OF THE STUDY

__ ___as ___ objective of this project to analyze the managerial
__cisi__ at the central office level of the Dufferin County Board of
_ ___a__o_ in order to design an integrated information system.

_hough the scope of the system was limited to central board functions,
___rma_ion to and from "external" bodies were dealt with as interfaces
___ the central board. These included flows of information between:

- school board administration and trustees
- school board administration and Ministry of Education
- school board administration and individual schools

A_ _hou_ _ the focus of the study was the central office of the Board,
it was expected that studying the information needs of the elementary

and secondary schools uld provide a usel basis for standar ing

their data ases--es ally important a a time of rapid mov

of princ l at the tary school e.

 the Boar s expecting t ndergo organization

ch ges nin the cc f the study d did, in fact, unde

t suc anges subsee o its inceio),it was expected

t would provi s which could be ueful in the sis

n or organiza hange. In addition, it could factte

t ementation of uc ange by providing for continuity

 systematic aly of decision functions which must xist

 of changes in onnel.

fortunately, c zational and staff changes at the board

ng e course of th dy caused considerable delays in its

 pleon. This was d (1) time required to update the decision

 ctio.s studied at th tset and (2) unanticipated loss of boad

 meabrs who were provide critical elements of data for the

pletio of the study For these reasons, the last step in complet-

ing the systems analysi is outlined at the end of the study and is

lef to the administrative staff at the Board.

APPROACH OF THE STUDY

The design of the Management Information System, as conceived

in this project, is based on user needs rather than the traditional

computer-oriented approach of MIS. This means that the systems

design is based on the information needs of the users rather than on

the hardware constraints of the computer. All media for storage,

processing and retrieval, including the manual component are
considered relevant to the system. In a small board such as Dufferin,
the computer may not even be a relevant component of the system. The
result is a total, integrated system which best serves the information
requirements of the Board's decision makers.

Given the frame of reference of the study major component
was the identification of the "users" of the MIS and determination
of their information needs, as related to their decision functions.
Operationally, this included: (a) the definition of the major decision
functions of key officials of the board, (b) analysis of the processes
in each function, (c) determination of relevant information require-
ments; and (d) identification of source data and timing required to
produce the information.

Given the above analysis, the data base can be designed and
maintained in such a way as to satisfy user requirements in the most
efficient and effective manner, utilizing any combination of media
(including the computer) available to the Board.

Since this approach maintains the importance of information
as supportive of the decision-making processes of the Board, the
general conceptual framework upon which it is based is one which
relates information to levels of decision-making, as in Figure 1.
Three levels of management decisions are shown to be supported by
the MIS: operational control, management (tactical) control and
strategic planning. Operational control relates to the daily routine
transactions of the system--purchasing, payroll, inventory control,
etc. Management control is concerned with short-range questions of

Figure 1

agement Levels and Information Flow

Director, Trustees,
Superintendents

STRATEGIC
PLANNING

Special Requests

Policy
Management
Information
(planning)

Support for
Decisions

Superintendents &
Administrators

MANAGEMENT
CONTROL

Information
Requests

Operating
Management Information
(Control)

Demand
Reports

Administrative
Support &
Teacher

OPERATIONAL
CONTROL

ansactions

Payroll

Accounts Receivable

Accounts Payable

Inventory Control

Bus Transportation

Student Counseling

Testing

Progress Reporting

Schedule
Reports

policy implementation. Strategic planning addresses itself to problems of policy-setting and long-range planning. The MIS design incorporates the information required for these three categories of decisions. The distinction between these types of information is useful because each involves different methods of generation, transformation and presentation. Strictly computer-oriented information systems usually are geared to the production of information for operational and tactical control; they tend to ignore information at the strategic planning level. The orientation of this study is to take all the necessary types of information into account, especially at the levels of tactical control and strategic planning.

To ensure that the user's perspective was maintained throughout, the Director maintained a close involvement with the study. He took an active role in defining the system's objectives, scope and specifications, and provided guidance and monitoring of the general direction of the project. His participation was invaluable both in providing his own keen insights into the operations of the system and in gaining the cooperation and confidence of all the board officials. The OISE study team provided the technical expertise for the analysis and the staff for the detailed interviews with Board officials.

The approach of the study for the OISE study team to conduct intensive interviews with Board officials ("users"), review the outcomes both with the officials interviewed and with the Director of the Board, update and revise these as necessary, and conduct the technical analysis. The key officials and staff at the

Dufferin Board were responsible for providing all the necessary infor-
mation inputs for the study. These officials and staff members were
extremely helpful and cooperative in spending large amounts of time
and energy in providing all the information at their disposal to the
study. Turnovers in officials, organizational changes and loss of
a critical administrative staff member caused unfortunate but
unavoidable delays in project completion.

SUMMARY OF OUTCOMES

    The outcomes of the study can be summarized as follows:

1. Systems analysis of the Board's operations. For each of the
    decision functions there is detailed analysis of its components
    with flowcharts of these activities, and their relationship to
    other major Board functions.

2. Synthesis of the information structure of the Board. This is
    presented in terms of an integrated overview of Board decision
    functions related to levels of decision-making and timing.

3. Need analysis for information system design. Information needs
    related to the decision functions of the Board are defined in
    terms of user requirements both at the level of the Board and at
    the level of the schools.

4. Recommendations for system implementation. Outline of further
    steps required for operational system design and implementation.

ANALYSIS PROCEDURES AND OUTPUTS

The initialization stage of the project consisted of the determination of the scope and approach of the project and review of general operations of the system.

The boundary of the system under study was defined as the operations of the central board office with detailed study of the interfaces from the elementary and secondary schools. The key decision makers were identified as: the Director of the Board, the three Superintendents, the elementary principals and the secondary principals.

The description of the study is divided in terms of (a) school level analysis, and (b) board level analysis, since each of these outcomes is likely to be relevant to different groups of administrators.

The following is an overview of the steps followed in conducting the study:

A. INITIALIZATION

B. SCHOOL LEVEL

　　1. Analysis

　　　　- identify users
　　　　- determine major decision functions

　　2. Synthesis

　　　　- integrate decision functions of principals
　　　　- determine information requirements

C. CENTRAL BOARD OFFICE

　　1. Analysis

　　　　- identify users
　　　　- determine major decision functions
　　　　- analyze processes of decision making

2. Synthesis

- integrate decision functions of board officials
- determine information requirements

A.   School Level

The school level of decision making was defined as critical
for inputs to the decision functions of the central board office. A
somewhat more detailed analysis was carried out at this level than
would normally be the case since there was a secondary objective of
standardizing data files at the level of the schools. At this level,
"user needs" were defined in terms of the decision functions of the
school principals. These will be dealt with in terms of elementary
and secondary principals. Volume II contains all the appendices
related to the school level of the analysis.

Elementary Schools

At the time of the study, there were ten elementary schools in
the system. The first step of the analysis was to determine the
principals' decision functions. Each principal was asked to complete
a form which listed his major decisions, along with frequency, time
of year, and general area into which the decision could be classified.
Due to the very large set of decisions which a principal must handle
daily, the principals found that it would be easier to compile a list
of major decisions jointly (since ultimately this was the purpose of
the exercise, in any case). Further analysis indicated that this
list could be synthesized into six general categories of decision:
students, instruction, staff, community relations, plant and trans-
portation.

Table 1 provides a general breakdown of these main decision areas. Appendix A contains the complete amalgamated list of the elementary principals' decision functions and an indication of the timing of these decisions. Tables 2a and 2b are samples from that appendix. Table 2a defines the decisions listed in category 1.1. Their code numbers relate to the specific decisions within a classification. For example, D1,1,1 indicates a decision (D) in the first category, the first sub-category and that it is the first decision on the list. Thus, it relates to the category of student-related decisions, deals with the area of student progress and impediments, and specifically, relates to the adjustment of pupil assignments to classes (D1,1,1). Each category of decisions listed in Table 1 is similarly broken down into specific decisions. These are found in Appendix A.

Next, the sequence and timing of each decision on the amalgamated list was determined. The final section of Appendix A presents this list in its entirety. Table 2b provides a sample from this list for category 1.1. It can be seen that decisions D1,1,1; D1,1,2 and D1,1,3 all occur in September followed by D1,1,4 in May, and D1,1,5 in June. The remaining decisions occur any time between September and June, as the need arises (ANA).

Having compiled an amalgamated list of the major decision functions of elementary school principals and their timing, the next step was to define the information required as inputs to each decision area. These were compiled by the elementary principals in conjunction with the OISE study team. Table 3 provides a sample listing of these information requirements. Appendix B provides the complete list of information requirements for all the decisions listed in Appendix A. This information, along with the

timing of decisions noted in Appendix A, can be used for scheduling the data acquisition and processing to meet required deadlines for decision-making by the principals. Four elementary schools were next selected at random to examine the actual files maintained for each of the categories of information noted in Appendix B. These were: Princess Margaret Public School, Princess Elizabeth Public School, East Garafraxa Central Public School, and Parkinson Centennial Public School. The results of this examination are included in Appendix C.

Secondary Schools

The procedure for analysis of information needs at the secondary school level differed somewhat from the elementary level, for two reasons. Firstly, there were only two secondary schools in the county, so the compilation of a merged decision list was less difficult. Secondly, at this level the objective of developing a uniform filing system did not exist, since turnover of secondary principals was not high. Therefore, the main purpose of this analysis was to provide the information interface with the Board.

Each principal completed a form which provided a list of his major decision functions along with frequency, time of year and the area of the decision. Table 4 is a sample page from such a list. Appendix D contains the individual lists for the two secondary principals. The two principals then developed a combined list of decisions, along with their associated information requirements. This list appears in Appendix E Part One. This merged list was further refined and developed into an amalgamated decision list for secondary principals in the same format as for the elementary principals, along with the timing of each decision. This list is also found in Appendix E.

TABLE 1: CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

1.   STUDENTS

1.1   Student Progress/Impediments
1.2   Student Guidance
1.3   Student Relationship to Physical Plant, Equipment

2.   INSTRUCTION

2.1   Curriculum
2.2   Instruction Budget

3.   STAFF

3.1   Staff: Hire, Terminate, Assess, Allocate
3.2   Staff Professional Development

4.   COMMUNITY RELATIONS

4.1   Community Relations - Parents
4.2   Community Relations - Other

5.   PLANT

5.1   Relations with Custodian
5.2   Maintenance
5.3   Facility Requirements
5.4   Fire Drill

6.   TRANSPORTATION

6.1   Transportation

TABLE 2a: SAMPLE PAGE OF AMALGAMATED DECISION LIST OF ELEMENTARY PRINCIPALS

1.3   Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities

D1,3,2 - Student breakage

D1,3,3 - Use of school equipment by the students

2.   INSTRUCTION

2.1. Curriculum

D2,1,1 - Introduction of a new programme

D2,1,2 - Philosophy and implementation, policy type decisions

D2,1,3 - What will electives (if any) be?

D2,1,4 - Assessment of an ongoing programme

D2,1,5 - Decision on old/new programme

D2,1,6 - Adjustment of programmes

D2,1,7 - Adjustment brought about to or because of D2,1,2

D2,1,8 - Areas of school concentration

D2,1,9 - Extra class learning, school activities, athletics,
          assemblies, etc.

D2,1,10 - Field trips, cost, transportation, etc.

2.2   Instruction Budget

D2,2,1 - Budget, twice yearly material - Textbooks
                                         - library books
                                         - consumables
                                         - spec. ed.

D2,2,2 - Budget, twice yearly material - industrial arts

D2,2,3 - Budget, once yearly material   - sports equipment

TABLE 2b: TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student Progress, Impediments

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1	X											
D1,1,2	X											
D1,1,3	X											
D1,1,4									X			
D1,1,5										X		
D1,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,8	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,12	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,13	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,14	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES

- registers
- master class lists
- test results
- teacher assessment
- report card
- attendance summary

D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS

- medical report
- psychological report
- special equipment
- transportation
- O.S.R.
- special Ed. report.

D 1,1,3 ASSESSMENT OF SPEECH--Who requre what help

- identification characteristics file
- referral file--Confidential Report
- health record
- O.S.R.
- teacher assessment

D 1,1,3 (b) ASSESSMENT OF HEARING

- health record
- O.S.R.
- public health nurse report
- teaching prescription

D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION

- candidate list
- psychological report
- academic report
- health record
- O.S.R.
- report card
- parent's permission

TABLE 4: INDIVIDUAL SECONDARY PRINCIPAL'S DECISION LIST - SAMPLE

Title: Principal - O.D.S.S.

Assign a No.		Decision: give a name and a brief description	Frequency	Time of year	Area of decision
Decision	1	What courses to list on the option sheet	once a year	Jan	Curriculum
"	2	What format of option sheet	once a year	Fall	Curriculum
"	3	What courses to offer when results of option sheets are known	once a year	Feb	Curriculum
"	4	How many sections of each course to offer	once a year	Feb	Curriculum
"	5	What rooms to assign to each course	once a year	Mar	Facilities
"	6	What teachers should be hired, based on teacher-pupil ratio	once a year	Mar	Recruitment
"	7	How many times to advertise each position	as need arises	March - June	Recruitment
"	8	What ratio of teacher to paraprofessionals to fill teacher-pupil ratio	once a year	Feb	Recruitment
"	9	How many classes should each teacher teach	once a year	Feb	Curriculum
"	10	How many classes should Department Heads teach	once a year	Feb	Curriculum
"	11	How many classes should Program Supervisor teach	once a year	Feb	Curriculum
"	12	How many classes should Vice Principal teach	once a year	Feb	Curriculum
"	13	How many classes should Chairman teach	once a year	Feb	Curriculum
"	14	How many classes should Assistant Department Head teach	once a year	Feb	Curriculum
"	15	How many classes should Principal teach	once a year	Feb	Curriculum
"	16	What classes each Vice Principal is responsible for discipline and attendance	once a year	June	Attendance

B. Central Board Level

At the central board level, the key decision makers were the Director and the three Superintendents. Since this comprised the total set of line officials at this level, the total analysis of decision functions depended upon intensive, time-consuming interviews with these key officials. Volume III of this report presents all the technical documents relevant to the analysis of the central board level decisions.

The first step of the analysis was the determination of the major decision functions of each official. A form describing the major decision functions, frequency, time of year and area of the decision was completed by these officials. During the course of the study, the Dufferin Board produced a newly revised document defining the operations of the Board by function. This document is presented for reference in Appendix F. Using this document, the initial decision list of each official at the board was updated to indicate within which board function each decision fell. Table 5 presents a sample page of such a form for the Director. Appendix G presents the complete set of decision lists for all the key board officials.

On the basis of this set of individual decisions, an amalgamated list of board level decision functions was compiled. This list is presented in Appendix H. Table 6 indicates the general categories of decisions for the central board office administrators, and Table 7 a presents a sample page of the amalgamated set of decisions. These decisions are coded both within the integrated set of board level categories as well as cross-referenced to the original individual decision lists.

TABLE 5: SAMPLE INDIVIDUAL DECISION LIST AT CENTRAL BOARD OFFICE

ITLE: Director of Education and Secretary-Treasurer

lumber	Decision	Frequency	Time of Year	Board Function
201	Allocation of Director's time: a) Organization of time to various responsibilities - what can be delegated - to whom b) Priorities on personal time	Continual	All	(1) Organizational Planning
R02	Interpretation of - Board policy - needs and wants of personnel; how to handle	continual	All	(2) Organizational-Executive Level
R03	Budget preparation - regular needs - special needs and projects	yearly	Oct-Feb	(3) Administrative Relationships
	- how much total budget can mill rate stand politically	yearly	Oct	
	- how much total budget can ceiling stand	yearly	Oct	
R04	How should budget be distributed among schools	yearly	Feb	(3) Administrative Relationships
R05	Budget control			
	- day school regular	monthly	All	(3) Administrative Relationships
	- conferences, courses during year	monthly	All	
	- What summer courses for teachers should be subsidized by the Board?	yearly	Nov	

17

23

24

TABLE 6: CLASSIFICATION OF CENTRAL OFFICE DECISIONS

1.   INSTRUCTIONAL PROGRAM

1.1   Budget
1.2   Academic Program

2.   STAFFING PROGRAM

2.1   Staff Relations
2.2   Hiring
2.3   Professional Development
2.4   Salary
2.5   Organization

3.   RELATIONS (Board/Community)

3.1   Board
3.2   Community

4.   TRANSPORTATION

4.1   Transportation

5.   PLANT

5.1   Problems Arising
5.2   Accommodation

2.5   Organization

D2,5,1 - Organizational Changes (R10)

3.   RELATIONS (BOARD/COMMUNITY)

3.1   Board

D3,1,1 - Determination of Method of Budget Presentation (R03/B11)

D3,1,2 - Agenda Items/Board Reports
              (a) Board/Executive (R19.1)
              (b) Education Committee (S07)
              (c) Accommodation/Maintenance (M01)
              (d) Management Committee (R19.2)

D3,1,3 - Monthly Financial Reports to Board (B02, R21)

D3,1,4 - Interpretation of Board Policy - Staff Morale &
           Welfare Policies (R02,R11)

D3,1,5 - Items Referred to Board or Administration? (R18)

D3,1,6 - Items Referred to Board Solicitor (R16)

3.2   Community

D3,2,1 - Justification of Spending (R13)

D3,2,2 - Answers to Public Re School Areas, Bus Routes, etc. (B01,B06,M06)

D3,2,3 - Information to Federations, Press & Public (R17)

4.   TRANSPORTATION

4.1   Transportation

D4,1,1 - Determination of Transportation Arrangements with Bus
           Operators (Routing, Loading, Payment)   (B10)

TABLE 7b: TIMING AND SEQUENCE OF CENTRAL BOARD LEVEL DECISIONS (Sample)

1.   INSTRUCTIONAL PROGRAM

1.1   Budget

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1		X				X						
D1,1,2						X						
D1,1,3	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,4	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,5						X						

1.2   Academic Program

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,2						X	X	X	X	X	X	X
D1,2,4									X			
D1,2,5										X		
D1,2,6											X	

In addition, the board level decisions were also classified according to the board functions specified in Appendix F. This classification scheme is presented in the second half of Appendix H. The reason for this additional classification of decision functions was the production of the document of board level functions after the original categorization scheme was developed. It was felt that such cross-classification would provide additional useful inputs to the board. Following the compilation of the amalgamated list of board decision functions, a synthesized list of the sequence and timing of these decisions was developed. Table 7b provides a sample of this synthesis. Appendix I contains the full list of these decision sequences.

Since the focus of the study was the central board office, a more detailed analysis of the decision functions was conducted than at the school level to determine the relevant information requirements. The approach consisted of detailed interviews with each of the key board officials to produce flowcharts of the processes involved in each of the decision functions on his list. These flowcharts were sufficiently detailed to include the points at which information was utilized in the process as inputs and information which resulted as outputs of the process. This analysis served a multi-fold function: (a) it allowed the board officials the opportunity to analyze their decision-making activities in a manner that they would not normally be able to, (b) it served to indicate the interrelationship between different decision functions of the board, and (c) it provided a more valid and reliable means of determining the actual information relevant to the decision-making process than simply asking for a list of information items used.

FIGURE 2:   SAMPLE FLOWCHART OF BOARD LEVEL DECISION FUNCTION

STRIKING COUNTY PUPIL/TEACHER RATIO

i) Secondary

```
Dep'n of P/T        Find out P/T      P/T Ratio      Composition      Propositions
ratio --            R by schools      across         - size of        of programs
trustees'                             province       schools
council

                    P/T Ratio                                         Special pro-
                    by school                                         blems of sch.
                                                                      note special
                                                                      courses

                                      Reasons for
                                      dev. from
                                      Prov. norm

                                      Reasons for      Set new P/T
                                      deviations       Ratios by
                                                       school

County           Set county                          New P/T
P/T R            P/T Ratio                            Ratios by
                                                      school

                                      Extra
Get Board          Approved           personnel
approval                              required
```

ii) Elementary

```
P/T Ratio          Itinerant
across             teachers
Province           - spec. ed.
                    etc.
                                                  P/T Ratio          Get county
Projected                                         for county         P/T Ratio
enrollment                                        next year          approved

Size/Types of      Determine         P/T Ratio
classes in         P/T R for         for each
each sch.          sch.&overall      sch. next
next yr.                             year
```

Figure 2 is a sample flowchart of the variety described. Appendix J

contains the total set of flowcharts for the central office decision

functions. Where several decision areas utilized the same sub-set of

decisions, these were flowcharted separately and called "Information

Transformation Modules". These represent areas of information-

generating activities common to more than one decision function.

Table 8 is a list of all the Information Transformation Modules in

the central board decision functions. These too are found in

Appendix J.

From these flowcharts, a list of required information items

was compiled for each decision. Table 9 is an example of such a listing.

Appendix K contains the total set of information needs by decision

functions at the Board level.

TABLE 8: INFORMATION TRANSFORMATION MODULES

ITM1   Enrollment Projections (Twice Yearly)

ITM2   Revenue Projections (Twice Yearly)

ITM3   Maintenance Cost Projections

ITM4   Debt Charge Projections
            Estimated Revenue for Salaries

ITM5   Busing Costs Projection

ITM7   Facilities Projection

ITM8   Amount Available for Schools (Jan.-Feb.)

ITM9   Assessment of Present Program

ITM10   Review of Present Curriculum in Print

ITM11   New Curriculum Needs

ITM12   M.E. Guidelines

ITM13   Priority of Needs

ITM14   Determine Money Available for Elementary School Staffing

ITM15   Data by Criteria (Evaluation of Elementary Principals)

TABLE 9:   SAMPLE LIST OF INFORMATION REQUIRED FOR BOARD LEVEL DECISIONS

(3)   <u>ADMINISTRATIVE RELATIONSHIPS</u>

    <u>R03   Budget Preparation</u>

    <u>Documents</u>

    Accumulation file on desired budget expense

    Basic form from central office

    Desired items with priority attached

    Principal's opinion

    Superintendent's prior assessment of needs

    Estimated amount for main budget

    Supervisor of plant - estimate of prices

    Budget for main (implied)

    Proposed main budget

    <u>Consumable/Cap. Alloc.</u>

    Principal's consumable and capital allocation requests

    Goals of county system progress

    Average per pupil allotments across province

    P/T ratios by school

    Econ. milieu inflation

    Per pupil allotments

    Needs of spec. ed. music etc.

    Total reg.

    ME grant regulation

    Assessment (by area)

    Mill rate

    Proposed budget

RESULTS OF THE STUDY

The outputs presented in Volumes II and III of this report
present the major results of the study relevant to information
analysis at the Dufferin Board of Education, at the levels of the
schools and the central board office, respectively. These results
constitute a systems analysis of activities of the board. These
can be used for analyzing board functions and determining areas
where more rational and efficient procedures can be developed. These
outputs can also be useful in undertaking future organizational
changes at the board level.

In addition, it provides the board with an integrated, com-
prehensive list of functions and specific areas of decision-making
that can be applicable in periods of rapid turnover of staff or
for use in description of duties after organizational changes have
occurred. The set of board level and school level decisions, as
presented, represent functions necessary to the operations of the
board, and therefore, can be viewed as independent of specific
personnel or organizational structure. As activities of the board
are altered, these documents can be updated as required to provide
a continuing, up-to-date analysis of the board's major functions.

The major output of the study, with respect to the objectives
originally defined, is the identification of the flows of information
at the level of board office decisions and the definition of related
information needs. Information needs at the school level of decision
making can be viewed from the perspective of inputs to the board's
decision-making processes or from the internal requirements of the
schools.

RECOMMENDATIONS FOR IMPLEMENTATION

To further develop the information system design and implementation the Board can complete the following steps:

1. Specific sources of information in terms of the board's files can be noted on the documents in Appendix K which list information needs by decision. By including the specific timing of decisions on these lists (from Appendix I), the schedule of information-generating procedures can be established. The following format can be followed:

Decision Function: _____

Information Needs   Sources   Timing

This format would establish a schedule linking decision-making requirements with data extraction and processing as prerequisite inputs to the decision functions.

2. Analysis of the decision flowchart (Appendix J) and the information needs documents (Appendix I) along with the results of step 1 above, will provide the board with an indication of areas of information gaps and inadequacies as well as areas of information overload and redundancy.

3. Data files can be designed by identifying clusters of information needs as they relate to board functions or categories of board decision areas. This can be done by developing a matrix classification of decision areas vs. associated information categories.

"Information categories" are those which can then relate to data files. The latter can be obtained from Appendix K and documentation of source files noted in Step 1 above. The following format can be used as a guide:

INFORMATION CATEGORIES

DECISION AREAS	Personnel Adm Admin.	Staff Development	Staff Evaluation	Finance	Purchasing & Supplies	Plant & Facilities	Student Services (Special)	Instructional Program	Student Information	etc.
1. Instruction										
1.1 Budget										
1.2 Academic Program										
etc. (See Table 6 for entire list of areas)										

4. Procedures for maintaining and updating the data files can be established to correspond to timing requirements of the decision functions as well as to changes in them. Data control is then concerned with the tasks of data gathering, preparation, retrieval, transformation and maintenance. The end product would be a set of procedures that outlines the control and maintenance functions of the information system by scheduling, initiating and monitoring its operations.

FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND

MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume II: Technical Appendices - School Level

Susan Padro

March, 1977

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Volume II: Technical Appendices – School Level

APPENDIX A

ELEMENTARY PRINCIPALS' AMALGAMATED DECISION

FUNCTIONS AND TIMING

CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

A.   MAIN CATEGORIES

1.   STUDENTS

1.1   Student Progress/Impediments
1.2   Student Guidance
1.3   Student Relationship to Physical Plant, Equipment

2.   INSTRUCTION

2.1   Curriculum
2.2   Instruction Budget

3.   STAFF

3.1   Staff: Hire, Terminate, Assess, Allocate
3.2   Staff Professional Development

4.   COMMUNITY RELATIONS

4.1   Community Relations - Parents
4.2   Community Relations - Other

5.   PLANT

5.1   Relations with Custodian
5.2   Maintenance
5.3   Facility Requirements
5.4   Fire Drill

6.   TRANSPORTATION

6.1   Transportation

B.   SUB-CATEGORIES

1.   STUDENTS

1.1   Student Progress/Impediments

D1,1,1 - Adjustments of pupil assignments to classes

D1,1,2 - Students with physical handicaps, what special
           must be done

D1,1,3 - (a) Assessment of speech, who requires what help
           (b) Assessment of hearing, who requires what help
           (c) Assessment of vision, who requires what help

D1,1,4 - Who into Special Education or pre-occupations

D1,1,5 - (a) Promotion of students
           (b) Placement of students into classes

D1,1,6 - (a) Accident and/or sickness of students - as an emergency
           (b) Accident and/or sickness of students - results from

D1,1,7 - Communicable diseases

D1,1.8 - Student welfare - do they come poorly clothed, unclean,
           inadequate lunches, etc.

D1,1,9 - Discipline of misbehaving students

D1,1,10 - Attendance problems

D1,1,11 - Student progress problems

D1,1,12 - Individual level adjustment

D1,1,13 - Remedial instruction useful

D1,1,14 - Enrichment useful

D1,1,15 - Special service assessment useful

D1,1,16 - Psychological problems of the students

1.2   Student Guidance

D1,2,1 - Guidance decisions for grade 8 students re grade 9 options

1.3 Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities

D1,3,2 - Student breakage

D1,3,3 - Use of school equipment by the students

2. INSTRUCTION

2.1 Curriculum

D2,1,1 - Introduction of a new programme

D2,1,2 - Philosophy and implementation, policy type decisions

D2,1,3 - What will electives (if any) be?

D2,1,4 - Assessment of an ongoing programme

D2,1,5 - Decision on old/new programme

D2,1,6 - Adjustment of programmes

D2,1,7 - Adjustment brought about to or because of D2,1,2

D2,1,8 - Areas of school concentration

D2,1,9 - Extra class learning, school activities, athletics, assemblies, etc.

D2,1,10 - Field trips, cost, transportation, etc.

2.2 Instruction Budget

D2,2,1 - Budget, twice yearly material - Textbooks
                                          - library books
                                          - consumables
                                          - spec. ed.

D2,2,2 - Budget, twice yearly material - industrial arts

D2,2,3 - Budget, once yearly material   - sports equipment

D2,2,4 - Budget, once yearly material - audio-visual
- capital equipment
- oral French
- music
- remedial & enrichment
- science supplies/equipment
- art
- novels

D2,2,5 - Budget, weekly material - home economics

3.   STAFF

3.1   Staff: Hire, Terminate, Assess, Allocate

D3,1,1 - Assessment of probationary teachers

D3,1,2 - Teacher requirements

D3,1,3 - Hiring

D3,1,4 - Assessment of permanent teachers

D3,1,5 - Placement of teachers

D3,1,6 - Supply teachers

D3,1,7 - Dismissal of teachers

3.2   Staff Professional Development

D3,2,1 - Teacher request to visit

D3,2,2 - Consultants

D3,2,3 - In-service training

4.   COMMUNITY RELATIONS

4.1   Community Relations - Parents

D4,1,1 - Decisions on open houses, parent nights, interviews,
         comments of parents, once a term

D4,1,2 - Parental complaints, how to handle

4.2   Community Relations - Other

D4,2,1 - Facility rental

D4,2,2 - Other problems in school-community relations
              (e.g., charity work)

5.   PLANT

5.1   Relations with Custodian

D5,1,1 - Supervision of custodial staff

D5,1,2 - Custodial/staff relations

5.2   Maintenance

D5,2,1 - Cases of vandalism

D5,2,2 - Maintenance, repairs required (by who)

5.3   Facility Requirements

D5,3,1 - Additional classrooms

D5,3,2 - Storage needs

5.4   Fire Drill

D5,4,1 - Fire drill, when, etc.

6.   TRANSPORTATION

6.1   Transportation

D6,1,1   -   Transportation, policy normal

D6,1,2   -   Transportation, winter storm procedure, decide upon

D6,1,3   -   Transportation, bus breakdown

D6,1,4   -   Transportation, early dismissal (non-storm)

D6,1,5   -   Transportation, pupils change bus

D6,1,6   -   Transportation, implementation of D6,1,2, include
             billeting of students whenever necessary

C.   TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1.   STUDENTS

1.1   Student Progress, Impediments

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1	X											
D1,1,2	X											
D1,1,3	X											
D1,1,4									X			
D1,1,5										X		
D1,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,8	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,12	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,13	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,14	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

1.2   Student, Guidance

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,1							X					

1.3   Student, Relationship to Physical Plan/Equipment

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,3,1	X											
D1,3,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,3,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2.   INSTRUCTION

2.1   Instruction, Curriculum

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X											
D2,1,2	X											
D2,1,3	X				X			X				
D2,1,4				X					X			
D2,1,5								X				
D2,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,8	X									X		
D2,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2.2   Instruction, Budget

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1		X							X			
D2,2,2		X						X				
D2,2,3								X				
D2,2,4									X			
*D2,2,5	X	X	X	X	X	X	X	X	X	X		

*Weekly

3.   STAFF

3.1   Staff, Hire, Terminate, Assess, Allocate

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1			X				X		X			
D3,1,2								X				
D3,1,3								X				
D3,1,4								X	X			
D3,1,5									X	X		
D3,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.2   Staff Professional Development

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,2,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

4.   COMMUNITY RELATIONS

4.1   Community Relations - Parents

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1	X				X			X				
D4,1,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

4.2   Community Relations - Other

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D4,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5.   PLANT

5.1   Relations with Custodian

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1	X	X										
D5,1,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5.2   Maintenance

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D5,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5.3   Facility Requirements

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,3,1								X				
D5,3,2									X			

5.4   Fire Drill

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,4,1	X	X	X	X	X	X	X	X	X	X		

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6.   TRANSPORTATION

6.1   Transportaticn

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D6,1,1	X											
D6,1,2	X											
D6,1,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,6				ANA	ANA	ANA	ANA					

APPENDIX B

ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS

D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES

- registers
- master class lists
- test results
- teacher assessment
- report card
- attendance summary

D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS

- medical report
- psychological report
- special equipment
- transportation
- O.S.R.
- special Ed. report.

D 1,1,3 ASSESSMENT OF SPEECH--Who requre what help

- Identification characteristics file
- referral file--Confidential Report
- health record
- O.S.R.
- teacher assessment

D 1,1,3 (b) ASSESSMENT OF HEARING

- health record
- O.S.R.
- public health nurse report
- teaching prescription

D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION

- candidate list
- psychological report
- academic report
- health record
- O.S.R.
- report card
- parent's permission

D 1,1,3   (c) ASSESSMENT OF VISION

- health record
- O.S.R.
- public health nurse report
- teaching prescriptions
- teacher assessment

D 1,1,5   (a) PROMOTION OF STUDENTS

- report card (student file)
- O.S.R.
- objective and teacher tests
- recommendations--teacher

D 1,1,5   (b) PLACEMENT OF STUDENTS INTO CLASS

- standardized tests
- objective and teacher assessment
- social relationship inventory
- class list
- June promotion data

D 1,1,6   (a) ACCIDENT AND/OR SICKNESS OF STUDENTS

- telephone number of parent and/or employer
- telephone number of alternate family
- telephone number of ambulance and hospital
    choice of hospital--doctor
- list of students with special medical problems
- accident report
- insurance--list

D 1,1,6   (b) ACCIDENT AND/OR SICKENSS OF STUDENTS

- telephone number (a) parent and/or employer
                   (b) alternate
- insurance--list
- medical report
- parental information

D 1,1,7   COMMUNICABLE DISEASES

- health unit data--handling the disease
- previous precaution
- medical consultation

D 1,1,8   STUDENT WELFARE

- family background--nurse
- O.S.R.
- children Aid-- if involved
- teacher notification

D 1,1,9   DISCIPLINE OF MISBEHAVING STUDENTS

- O.S.R.
- teacher assessment
- behavioural file
- confidental report
- psychological report

D 1,1,10   ATTENDANCE PROBLEMS

- Board Policy
- register
- teacher report
- attendance officer telephone number
- attendance officer report

D 1,1,11   STUDENT PROGRESS PROBLEMS

- O.S.R.
- report card
- standardized test
- nurse report

D 1,1,12   INDIVIDUAL LEVEL ADJUSTMENT

- See D 1,1,1

D 1,1,13   REMEDIAL INSTRUCTION USEFUL

- O.S.R.
- report card
- standardized test
- special education recommendation
- remedial class list and waiting list

D 1,1,14   ENRICHMENT USEFUL

- O.S.R.

- standardized test

- special education recommendation

- teacher assessment and recommendation

D 1,1,15   SPECIAL SERVICE ASSESSMENT USEFUL

- teacher's assessment and report

- referrals

- O.S.R.

- report card

- health record

D 1,1,16   PSYCHOLOGICAL PROBLEMS OF THE STUDENT

- teacher assessment

- psychological reports

- O.S.R.

- medical and/or health record

- children's Aid if involved

- Community Psychiatric Hospital-Guelph

D 1,2,1   GUIDANCE DECISIONS FOR GR. 8 STUDENTS

- data from Secondary Schools

-                        (Calendar)

- progress reports

- O.S.R.

D 1,3,1   POLICY ON STUDENT CARE OF FACILITIES

- Board policy

- school policy

D 1,3,2   STUDENT BREAKAGE

- Board policy

- school policy

- maintenance requisition form

D 1,3,3,   USE OF SCHOOL EQUIPMENT BY THE STUDENTS

- Board Policy

D 2,1,1   INTRODUCTION OF A NEW PROGRAMME

- Cost factor

- general ability level of children and their needs

- resources available and required

- social implications

- community implications

D 2,1,2   PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DIVISIONS

- needs of the school and community

- factors affecting the change

- resource needed for change

- physical requirements of the school to adapt to
  such a change

- community co-operation

D 2,1,3   WHAT WILL ELECTIVES (IF ANY) BE?

- interest of teachers

- interest of pupils

- facilities

- parent involvement (community)

- time--during day

- economic requirements

D 2,1,4   ASSESSMENT OF ONGOING PROGRAMME

- efforts (a) written
          (b) oral

- objectives

- resources

- suited to individual

- creativity

- interest

- use of time

- involvement

- skills acquired

D 2,1,5   DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR

- use of D 2,1,4, Information sheet

- new situations which have developed

D 2,1,6   ADJUSTMENT OF PROGRAMME

- cost

- adaptation to physical plant

- assessment of present programme
(2,1,4) + (D 2,1,5)

D 2,1,7   ADJUSTMENT BROUGHT ABOUT TO OR BECAUSE OF D 2,1,2

- nothing extra

D 2,1,8   AREAS OF SCHOOL CONCENTRATION

- grade concentrations--numbers

- academic needs of students

- qualifications of teachers

- physical capabilities of the school plant

D 2,1,9   EXTRA CLASS LEARNING--ATHLETIC ASSEMBLIES
SCHOOL ACTIVITIES

- plant capabilities

- timetable available time in learning areas

- number of classes

- age and/or grade levels

- staff needs

D 2,1,10   FIELD TRIPS, COST, TRANSPORTATION ETC.

- objectives of trip
- length of trip

- learning activities--before
after

- cost of bus

- cost of activity

- fund raising activities

- parent involvement

D 2,2,1   BUDGET, TWICE YEARLY MATERIAL--texts
                                            library
                                            consummables
                                            spec.ed.

           - number of pupils--regular class
                                  special ed.

           - special needs of teachers for special programme

           - existing supplies

           - projection of needs

D 2,2,2   BUDGET TWICE YEARLY MATERIALS/INDUSTRIAL ARTS

           - number of boys

           - programme objectives as set out by teacher

           - material needed for projects

           - equipment available

           - suppliers--cost

D 2,2,3   BUDGET ONCE YEARLY MATERIAL--SPORTS EQUIPMENT

           - equipment inventory

           - needs as related to proposed programme

           - projected cost factor

D 2,2,4   BUDGET ONCE YEARLY MATERIAL

           - Inventory of present equipment

           - objectives of the programme

           - number of students to take part

           - replacement or new

D 2,2,5   BUDGET, WEEKLY MATERIAL-HOME ECONOMICS

           - long range plans

           - short term plans

           - number of students involved

           - suppliers--cost

D 3,1,1   ASSESSMENT OF PROBATIONARY TEACHERS

- test marks of students (compared to previous)
- test marks of students (compared to other students of same level)
- attitudes (measurable) of students
- curriculum development involvement
- professional development involvement

D 3,1,2   TEACHERS REQUIREMENTS (NO. OF)

- no. of students
- pupil/teacher ratio for county
- county policy re para-professionals
- general intellectual level of students of school area
- no. of special education classes in school
- type of programme to be operated
- type of school facilities e.g. open space

D 3,1,3   TEACHER HIRING

- educational background of applicants (degree, special courses etc.)
- teachers' college or former school rating
- advertise (type of)
- type of information sheets to be completed by applicants
- interviewing procedure--where, when, who involved, how
- specific needs of each school
- ratio of experienced to inexperienced
- male or female
- age of applicant

D 3,1,4   (SAME AS D 3,1,1)

D 3,1,5   PLACEMENT OF TEACHERS

- teacher's desire and interest
- programme requirements
- education and qualifications of teacher
- experience of teacher
- type of students
- type of facility
- type of programme with which she/he has had experience

D 3,1,6   SUPPLY TEACHERS

        - experience

        - qualifications

        - type of programme worked in

        - level preference

        - previous performance

D 3,1,7   DISMISSAL OF TEACHERS

        - Negative reprots using D 3,1,1 or D 3,1,4 as
          assessment criteria

        - Visits of superintendent to teacher in question
          will occur a number of times

          He will make written reports, seen and signed by teacher

        - Numerous principal written reports will be in existence
          (dated and signed by teacher in question).

D 3,2,1

        - reason for request

        - can her class be covered (other teacher's timetable).

        - how can her class be covered

        - can arrangements with place to be visited be made?

        - no. of previous visits

D 3,2,2   CONSULTANTS

        - does principal or staff decide whether consultation

        - which consultant

        - for how long--when?

        - type of workshop, lecture, etc.

        - with other schools, single staff, division, or individual

        - no of visitations

        - exact follow procedures

D 3,2,3   IN SERVICE TRAINING

        - measure student progress

        - measure student attitudes and interests

        - measure student behaviour

        - who will receive (whole staff, individual)

        - in which areas e.g. subject, class management, etc.

        - who will provide training

        - format of training

        - no sessions   61

D 4,1,1   DECISION ON OPEN HOUSE
           (Parents Night, Interview, etc.)

           - staff wishes

           - parental wishes

           - administration wishes

           - children's wishes

D 4, 1,2   PARENTAL COMPLAINTS, HOW TO HANDLE

           - nature of the complaint

           - whether to call the person complaining on the phone
             or have them come in

           - the number of complaints

           - if the complaint involved pupils, where they were
             at the time of the problem

D 4,2,1   FACILITY RENTAL

           - what groups should pay for the facility and what
             groups shoult not

           - how groups make application for use of facility

           - procedure to follow in case of damage to facility

           - rules to follow while facility is being used (e.g. use
             of type of footwear, school equipment, etc.)

           - storage of group's equipment

           - responsibility of Board in case of accident or personal
             injury

           - who is responsible for facility while group is using it

           - when the facility is available

D 4,2,2   OTHER PROBLEMS IN SCHOOL--COMMUNITY RELATIONS

           - the nature of the problems with these projects

           - who should represent the school in the project

           - how to stimulate interest in school--community activities

           - how and who deals with the complaints

           - what the interest of the community is in community--school
             activities

D 5,1,1   SUPERVISION OF CUSTODIAL STAFF

                - work habits, notes on (i.e.--lazy)

                - recommendations

D 5,1,2   CUSTODIAL/STAFF RELATIONS

D 5,2,1   CASES OF VANDALISM
                - Board policy
D 5,2,2   MAINTENANCE, REPAIRS (by who)
                - due to vandalism

                - who to call for glass, hydro, etc.

D 5,3,1   ADDITIONAL CLASSROOMS

                - survey of subdivision

                - projected enrolment

                - teacher-pupil needs

D 5,3,2   STORAGE NEEDS

                - presently permanent

                - additions:

                     1) what is there now?
                     2) caretaker needs
                     3) teacher/pupil supply needs
                     4) order procedure (supplies)
                           -once, or twice
                     5) type of storage--central or dispersed

D 5,4,1   FIRE DRILL--when, etc.

                - school routines

APPENDIX C

SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS

ELEMENTARY SCHOOL: FILED DATA CATEGORIZED BY
DECISION INFORMATION REQUIREMENTS

PM = Princess Margaret Public School

PE = Princess Elizabeth Public School

EG = East Garafraxa Central Public School

PC = Parkinson Centennial Public School

$D_{1,1,1}$ ADJUSTMENT OF PUPILS TO CLASSES

-REGISTERS:-   Class Registration Book usually kept by class teacher

during term.

-MASTER CLASS PM   "Class Lists" Sept. 72, Organization" - (list of students
LISTS·-   by room No.)

               PM   "Teachers class lists 1972-73". - (unstandardized class
                    lists from teacher to secretary gives name, address,
                    tel., religion, parents' occupation.)

               PE   list of class allocations - "Kindergarten (72-73).

              ·EG   "classroom lists (72)"

-TEST RESULTS: PC   "Marks-Report Cards;" at end of each term each teacher
                    provides principal with class marks, then back in
                    file until next term.

               PM   "Term Report Cards and Mark Sheets (for 2 Years)."
                    (one term per folder, 3 terms per year, copies of
                    Individual Student Progress Report filed by class.

               PM   "Standardized Tests":- (lists of student scores on various
                    standardized tests - usually reading, Gates McGuity etc.)

               PE   "Continuous Progress-Reading:- "(checklists of Kindergarten
                    progress & achievement in level system. - skills tests
                    now recorded by group achievement and transferred to
                    individual record when student leaves or transfers.)
                    See OSR folders.

               PE   "Testing":- (correspondence, notes and forms re
                    standardized tests and scoring service).

               EG   "Special Test Results" (Binder File):- Gates McGuity etc.
                    standardized tests for selected grades.

               EG   "C.T.B.S." (=Canadian Test of Basic Skills):- memo from
                    Board Office on schedule of tests 1972.

-TEACHER   (mainly found on "Student Achievement Form") in OSR folder - PC.
ASSESSMENT:-
                  PM   See above.

                  PE   "Student Achievement Records": - ' .nder File) ?

                  PE   "Class Profiles": -(Teachers report to principal
                       about 1st Jan Re class problems of a group or
                       individual nature.)

                  EG   "Promotion Reports" - teachers report on order of merit
                       marks & recommendations re promotions, failures.

-REPORT CARD-   PC   (see above)
                  PM   (see above)

-ATTENDANCE   PC   "Forms - Attendance Reports": - monthly to Board office -
SUMMARY:-   secretary keeps current reports & compiles new ones
                       using "attendance record book. PC.

                  PM   "Monthly Attendance":- (Binder File) current admissions,
                       transfers, retirements by classrooms:- running tally
                       of students.

                  PM   "Monthly Report":- Copies of Monthly Attendance Reports
                       contain: teacher as for PC above.

                  PE   : contains teacher abscences, supply teachers used &
                  EG   student inventory.

$D_{1,1,2}$ STUDENTS WITH PHYSICAL HANDICAPS

- MEDICAL REPORT
-PSYCHOLOGICAL REPORT   Presumably kept by the nurse or
-SPECIAL EQUIPMENT   therapists concerned.
-TRANSPORTATION
-OSR   - grouped by classroom.
-SPECIAL Ed. REPORT

-MINOR ALLERGIES -   PC "Nurse Health":- parents notification of childs'
                         allergies.

                      PC.PE.EG. "Emergency File": - School list by class of
                         childrens' handicaps, allergies, etc., with notes.

$D_{1,1,3}$ ASSESSMENT OF SPEECH

-IDENTIFICATION CHARACTERISTICS FILE

                  PC   "Special Education, Memos, lists":- includes correspondence
                       with Special Ed. Consultant re characteristics of pupils
                       with possible problems.

                  EG   "Learning Disabilities - Diagnosis & Remediation":-
                       - Note on Do's & Don'ts for teachers of stutterers.
                       - diagnosis guides for learning disabilities in general.

-REFERRAL FILE---CONFIDENTIAL REPORT:

    PC Principals' personal binder files "Confidential Special Ed.,
        students 'test results etc."

  maintained by visiting specialists. PE, PM, EG. "Special Services
      Log." - current student lists for students undergoing therapy,
      under investigation, review, dismissals, referals.

    PM "Remedial Reports (1971-72)":- Reports by teacher on Children
        in remedial class - anecdotal.

    PE Principals anecdotal File - Pupils.

-HEALTH RECORD:- In nurses files.

-OSR:-   O.K.

-TEACHER ASSESSMENT:-

    PC "Special Education, memos, lists," - contains lists of students
    EG with learning difficulties, receiving therapy, under review,
        with their disfunction.

    PE "Remedial Speech." Copy of 1971 remedial speech survey form
        sent to Speech Therapist at Board Office, gives list of
        children with great difficulty who may require help.

    PM "Student Therapist Activities": - list of students to receive
        remedial therapy + record of teachers' meetings with therapist.

$D_{1,1,3}$ ASSESSMENT OF HEARING:

-HEALTH RECORD:-   Nurses Files.
-O.S.R.:-   O.K.
-PUBLIC HEALTH NURSE REPORT:- Nurses Files?
-TEACHING PRESCRIPTION:-   Special Services Log (see PM above)

    PM "Student Therapist Activities:"- suggested procedures for
        therapists.

$D_{1,1,4}$ WHO ENTER SPECIAL ED^N OR PRE-OCCUPATION: (This is not primarily the
                                   Principals' Decision)

-CANDIDATE LIST:-   PC "Special Education, memos, lists":-
                    - survey of pupils with learning difficulties,
                    - class rolls for Special Ed.
                    - list of students under review for Sp. Ed. and
                      their dysfunction.

                PM Special Education":- list of applicants being
                  "-Pre-occ. Nomina- considered for Pre-Occ. programs
                  tions"   (standard board form)

PM, EG, PE. "Special Services Log":- Special & Remedial class Lists.

-PSYCHOLOGICAL REPORT:-

PM, EG. Nearest is "Confidential Report" on special children sent by Principal to Board consultants on Psychiatric Hospital.

-ACADEMIC REPORT:-

PC "Principals' Personal Desk Binder Files",
- Confidential Special Ed. Students test results.

PM "Term Report Cards & Mark Sheets":- for last 2 years shows individual student progress.

PE Binder File "Student Achievement Records".

EG "Special Test Results" - standardized tests & individual reports.

-HEALTH RECORD - Nurses Files.
-O.S.R.   - O.K.
-REPORT CARD   - PC. PM. Term marks - copies of teachers' reports to parents (bound forms).

-PARENTS PERMISSION - PM. Application forms sent by Parents for entry into pre-occ. or occ. program.

-REMEDIAL REPORTS - PM. Reports on individual students in Remdial class from teacher of that class.

$D_{1,1,3}$ (c) ASSESSMENT OF VISION

-HEALTH RECORD - Nurses Files.
-O.S.R. -   - O.K.
-PUBLIC HEALTH NURSE REPORT - Nurses Files.
-TEACHING PRESCRIPTIONS - (Parkinson has its own special form which each teacher
-TEACHING ASSESSMENT -   fills out at end of Sept. - gives lists of "Hearing, Vision and Speech problem pupils. Have not found completed records, Presume Nurse keeps them.)

$D_{1,1,5}$ (a) PROMOTION OF STUDENTS   (Not too applicable in continuous Progress Environment except for Gr. 8).

-REPORT CARD (STUDENT FILE) - PC. PM. see above
-OSR -   - O.K. Contains student Progress Reports updated 3 times/yr.
-OBJECTIVE AND TEACHER TESTS:- PC on OSR folder. (space for standardized tests)

PC. PM. Term Reports & Mark Sheets.
PM. "Standardized Tests":- lists of students scores on various standardized tests - usu. reading.

PE "Student Achievement Records" binder.

EG "Special Test Results" - Gates-McGuity etc. standardized tests for selected grades. ()

-RECOMMENDATIONS-TEACHER

> EG "Promotion Reports 1972".- Teachers reports on order of
> merit, marks and recommendations - esp. for Gr. 8.
> Special reports on failures.

- SKILLS BOOKLETS (where developed, e.g., Primary & Junior Math)

> PE "continuous Progress-Reading:"- checklists of Kindergarten
> Progress & achievement related to level system. Skills
> Booklet for each child used to record levels attained
> - recorded & transferred to individual record when
> leave or transfer.

-AWARDS:-   PE.EG: "Graduation - Awards & Assembly":- list of
pupils receiving or eligible for various awards.

-PROMOTION LISTS - GR. 8 - PC.EG - made up in June after consultations, guidance,
etc. - copy to High School - summary of allocations to
Superintendent.

"BOARD POLICY RE CONTINUOUS PROGRESS":- memos from central office explaining
policy.

"CLASS LISTS" - see above.

$D_{1,1,5}$ (b) PLACEMENT OF STUDENTS CLASS

-STANDARDIZED TESTS - PM.PE.EG. as in objective & teacher tests (above)

-OBJECTIVE AND TEACHER ASSESSMENT -
> PM. PC. "Marks - Report Cards; - term marks.
> O.S.R. cards have student achievement & Progress Reports.

> PE "Student Achievement Records" binder.

> PE Skills test booklets.

-SOCIAL RELATIONSHIP INVENTORY - Nothing

-CLASS LIST - PC.PM.P.M.PE.EG. Student names by class.

-JUNE PROMOTION DATA - PC. "Grade 8 - Promotion lists"
> PM. "Promotion Sheets":- Gr. 8 Promotion to CDSS
> Also names & comments on special learning
> difficulty pupils.
> EG. "Promotion Reports 1972" - (see above) -
> - also shown on OSR folder.

-CURRENT REGISTRATION DATA (Particularly Kindergarten)

> PM "Monthly Attendance" Binder - contains admissions, transfers,
> retirements by classroom.

> EG.PE. "Kindergarten (72-73):- registration slips, list of class
> allocations.
> -Pre-school survey   69

-ELECTIVES -   PM.PE. Lists of students with given elective and
                                room taken in.

-TEACHERS TIMETABLES -
                        PM.PE.EG.EG. Teachers timetables and schedules of
                                     supervision duties.

$D_{1,1,6}$(a) ACCIDENT AND/OR SICKNESS OF STUDENTS.
                                              (EMERGENCY).

-TELEPHONE NO. OF PARENT AND/OR EMPLOYER -
        (This information is everywhere (in Ontario) available on the
        OSOR cards and is initially obtained from student registration
        forms. In addition some school secretaries have a quick look-up
        ROLEDEX file (alphabetic stud. name), with STUDENT NAME,
        ADDRESS, HOME TEL. NO., GRADE ETC.)

                        PC.PM.EG
                        PM. "Teachers class lists (1972-73)" - from teacher to
                             secretary giving class lists with name, address,
                             phone, emergency tel., Parents occup'n,
                             Religion. - could be used to update OSOR cards &
                             ROLEDEX file.

-TELEPHONE NO. OF ALTERNATE FAMILY -

                        PE. Questionnaire to Parents for updating records
                            asks for phone no. of close friend & own
                            doctor. - We haven't found records
                            referred to.

-TELEPHONE NO. OF AMBULANCE & HOSPITAL -

                        We presume someone has this e.g. on tel. pad.

-CHOICE OF HOSPITAL-DOCTOR -

                        Name & tel. of 'own' doctor is included in Kindergarten
                        Registration form.

-LIST OF STUDENTS WITH SPECIAL MEDICAL PROBLEMS -

                        PE. "Health" - list of children with special health
                             problems (by class)

                        EG. "Emergency File" - list of students and their
                             allergies.

-ACCIDENT REPORT -

                        PM. "students Insurance - accident reports":- includes
                             current student accident reports (standard forms.)

                        PE. "ACCIDENT-STUDENT ACCIDENT REPORT" - as PM above.

                        EG. "Student Accident Records & Policy" - as above

-INSURANCE - LIST - PC. "Insurance" - student policies & list of those covered.

+ accident claims forms.

+ blank insurance application forms.

PM. "Students Insurance - accident reports":- includes list of students enroled in accident insurance program.

PE. "ACCIDENT-INSURANCE-LIST of students insured with Dale & Co., ":- self explanatory.

EG. "Student Accident Records & Policy" - includes list of students, insured & correspondence with insurers.

$D_{1,1,6}$ (b) ACCIDENT AND/OR SICKNESS OF STUDENTS:-
(RESULTS FROM)

-TELEPHONE NUMBER   a) PARENT - as in (a) above.
                    b) ALTERNATE

-INSURANCE LIST -   as in (a) above.

-MEDICAL REPORT - (if different from ACCIDENT report, it is probably with nurse)

-PARENTLA INFORMATION - (if stored anywhere it would be in teachers or principals anecdotal student files, eg. PE

-"HOME INSTRUCTION"-

PC. Blank Request forms. (rarely used)

PM. Summary of time allocated to Home Instruction (1970) + costs for tutoring & transportation

EG. Current request forms (completed) for H.I. plus records of time spent thereon.

-CORRESPONDENCE WITH INSURERS-

EG. matters arising from accident claims, principal acting for parents usually.

$D_{1,1,7}$ - COMMUNICABLE DISEASES -

- HEALTH UNIT DATA - HANDLING THE DISEASE -

- PREVIOUS PRECAUTION

- MEDICAL CONSULTATION

(no information found in files)

$D_{1,1,8}$ STUDENT WELFARE:

-FAMILY BACKGROUND - NURSE

       PE Principals' Anecdotal file (on students with
          emotional or behavioural problems)

       PE Background notes on one particular student

-O.S.R.- O.K.

-CHILDRENS AID - IF INVOLVED:-

       EG. "Childrens Aid Society" - 1 pamphlet on how to spot
          'Battered Children'.

       EG. "Words of childrens Aid Society" - list of students
          applicable.

-TEACHER NOTIFICATION:- Nothing recorded.

-"WATER EXAMINATION REPORT": - EG. Certificates of school water
            supply satisfactories

-"NUTRITION REPORT -

       EG Nutritive value of chocolate milk report.

-"DENTAL HEALTH EDUCATION"

       EG Curriculum guide for program in dental health.

-DRUG ABUSE INFORMATION:-

       EG. Pamphlets on use & abuse of various drugs.

$D_{1,1,9}$ DISCIPLINE OF MISBEHAVING STUDENTS.

-O.S.R.: - O.K.

-TEACHER ASSESSMENT:-
       PE. "Class Profiles":- Teachers' Reports (JAN) to
         Principal No problems of group or individual
         nature in higher class.

-BEHAVIOURAL FILE:-
       PE. Principals' Anecdotal File (on students).
       PE.PE.EG. Notes on individual disciplinary cases with comments
         on interviews with teacher and parents. (Filed
         under student names).

-CONFIDENTIAL REPORT:-

                  PE. See above.

-PSYCHOLOGICAL REPORT:- (is this 'Psychologists' Report?; if so it is
                              held by central office)

                              (may be some reports in Special Services Logs)
                              This is highly confidential material and may be
                              locked away in principals' desk or somewhere).

-DIAGNOSTIC GUIDE:-

                  PM. "Teacher Information":- includes checklist for the
                        identification of emotionally disturbed students.
                        (compiled and distributed by principal to teachers).

-RULES OF CONDUCT:-

                  PE "Routines (1970-71)" - Rules for conduct & discipline
                      of school - advice from principal to teachers.

                  EG "Buses: Re student conduct:- notice to parents
                      explaining bus conduct rules and penalties.

-INFRANCTIONS AND PUNISHMENTS FILE:-

                  PC "Handbook-Teachers" - states therein that a file is
                      kept on students committing infractions and their
                      punishments - haven't found it.
                      (Handbook is written by Principal and provides
                      general information and advice to teachers.)

$D_{1,1,10}$ ATTENDANCE PROBLEMS

-BOARD POLICY - (every principal has an official Board Policy binder).

-REGISTER - (kept by class teacher except (for some schools) for short
                    time at end of each term)

-TEACHER REPORT -
                  PM Absentee sheets:- circulated through all classes
                    once or twice a week, to keep track of long absences.
                    each teacher marks off "room", "name of absentee," "first
                    date of absence and reason".

-ATTENDANCE OFFICER TEL. NO.:- (Central Office relays enquiries and requests
                    to attendance officer since he is only there one
                    day a week).

-ATTENDANCE OFFICER REPORT:-

                  EG "Counsellors Visits: Re Absents. - Mr. Irwin":-
                    - attenaance counsellors Reports.

ATTENDANCE PATTERN - EG. Summary of absenteeism for selected students.

-LATE SLIPS - 68. Blank forms for sending to parents as warning re repeated latene;

$D_{1,1,11}$ STUDENT PROGRESS PROBLEMS:-

-O.S.R. -   o.k. - includes Ontario "Student Achievement Form"
                      (filled in at end of year by class teacher).

                      - sometimes test results included.

-REPORT CARD - Duferin standard "Progress Report." forms for kindergarten,
                      Primary, Intermediate, Junior, Special Education,
                      (2 types), are made out by teacher for each student
                      at the end of the term (Nov, Mar, & June). One
                      copy to parents (white), one kept in OSR folder
                      (Pink) & one to school permanent files in VAULT PC
                      (Blue or in intermediate temporary office storage
                      for two years e.g. PM. PC.

-"STANDARDIZED TEST:"-

                      EG.PE. Binder. PM. list of student scores on various
                              standardized tests, (yearly eg. Gates McGuinty).

-NURSE REPORT - Nurses Files?

-EXPECTED ACHIEVEMENT LEVELS -

                      PE.PC. "Reading Program" - includes Gates reading
                              survey, literature on pre-reading achievement adn how ,
                              aquired.

                      PE. Diagnostic advice to teachers.

-TEACHERS ASSESSMENT -

                      PE. Class rofiles - problems of group and individual
                              nature.

$D_{1,1,12}$ INDIVIDUAL LEVEL ADJUSTMENT

                      See $D_{1,1,1}$

$D_{1,1,13}$ REMEDIAL INSTRUCTION USEFUL
                                           (See Central Office, Special Ed. files
                                           and forms)

-O.S.R.   - O.K.

-REPORT CARD - (see $D_{1,1,11}$ above).

-STANDARDIZED TEST -

                      (see $D_{1,1,11}$ above + Special services Logs) PM.PE.EG.

-SPECIAL EDUCATION RECOMMENDATION -

PM. Nomination Forms for special programs (teacher and Principal)

PE Requests for "individual examination by specialist

EG List of pupils recommended for remedial help and pupils who have repeated one or more grades (gives 'grade', 'age', 'IQ' - 1969) copies.

PC.PE. Correspondence with Special Ed. Consultant re students under consideration for Rem. Inst.

+ Special Services Logs:- for consultants' opinions and findings.

-REMEDIAL CLASS LIST AND WAITING LIST.

Current class lists should be in Special Services Log, PM.PE.EG. also referrals.
+ PC. "Special Education, names, lists." Survey of pupils with learning problems and list of students to receive regular therapy and their dysfunction.

- also those under review.

PM. "Student Therapist Activities": - current list of students to receive remedial therapy.

EG. "Regular Therapy Students": - list of pupils to receive regular therapy and under observation.

-REMEDIAL REPORTS - PE.PC.PM.EG. anecdotal records and reports and meetings
(CONFIDENTIAL)   with parents.

$D_{1,1,14}$ ENRICHMENT USEFUL.

The term "ENRICHMENT" does not occur in any of the files or forms.

$D_{1,1,15}$ SPECIAL SERVICE ASSESSMENT USEFUL.

-TEACHER'S ASSESSMENT AND REPORT -
PE. "Special Education" - current copies of "Request for Individual Examination by Specialist" forms.

-REFERRALS - (Special Services Logs.)

-O.S.R. -   O.K.

-REPORT CARD -   (See $D_{1,1,11}$)

-HEALTH RECORD -   (Nurses Files)

-CORRESPONDENCE WITH CONSULTANTS - PC.PM.

-SCHEDULES OF SPECIAL SERVICE STAFF VISITS.   "Special Ed." PM

$D_{1,1,16}$ PSYCHOLOGICAL PROBLEMS OF THE STUDENT.

-TEACHER ASSESSMENT - no records (probably informal and recorded in
                        principals' anecdotal files eg. PE

-PSYCHOLOGICAL REPORTS - (Special Services Log)
                        & see EG below.

-O.S.R.   O.K.

-MEDICAL AND/OR HEALTH RECORD - (Nurses file).

-CHILDREN'S AID IF INVOLVED -

            EG.   "Wards of Children's Aid Society" - list of students

            EG.   Catholic Children's Aid Society - Psychological Reports

-COMMUNITY PSYCHIATRIC HOSPITAL GUELPH -

            EG.   "Confidential":- CORRESPONDENCE from Principal and
                  teacher to Psych. Hospital re emotionally disturbed
                  student.

-PRINCIPAL'S CONFIDENTIAL FILES--

            PM.   "Confidential Reports":- From principal to board
                  consultants.

            PE.   "Principals' Anecdotal File" - notes re students
                  needing his special attention, eg. discipline or
                  emotionally disturbed.

            PE.   File on an individual student with a behavioural
                  problem. Includes notes, reports on interviews
                  with teacher, parents, etc.

            EG.   "confidential" - includes variety of correspondence
                  re disturbed students.

-CHECKLIST FOR IDENTIFICATION OF EMOTIONALLY DISTURBED CHILDREN.

            PE.   "Aids for Teachers":- includes a checklist for
                  the identification of emotionally disturbed children.

$D_{1,2,1}$ GUIDANCE DECISIONS FOR GR. 8 STUDENTS

-DATA FROM SECONDARY SCHOOLS -

        EG.PM.PC. "Grade 8 - Promotion Lists & Progress at
           O.D.S.S.":-

        PE. "Grade 9 ODSS English": Secondary school curriculum
          & course of study description: - option sheet.

        EG. "Orangeville District Secondary School - Course of
          Study":- description of programs at ODSS,

          - Correspondence with ODSS re XMAS marks of last
          years Gr. 8 graduates.

        EG. "Promotion lists (June 71)":- March report of r rks
          from Secondary School of former pupils.

-PROGRESS REPORTS) as described previously.

-OSR   )

-GRADE & PROMOTION SHEETS:- PM.PC.EG (above)

-TEACHERS RECOMMENDATIONS -

        EG "Promotion Reports" (1972):- Teachers' reports on order
          of merit and recommendations especially Grade 8.

-GUIDANCE LITERATURE -
        PC.PM.EG. "Guidance":- pamphlets, booklets on various
          careers and qualifications.

$D_{1,3,1}$ POLICY ON STUDENT CARE OF FACILITIES

-BOARD POLICY - Principal's Board Policy Manual
-SCHOOL POLICY - Haven't found any formal statements of facility use policy.

$D_{1,3,2}$ STUDENT BREAKAGE:

-BOARD POLICY:- Principals' Board Policy Manual.
-SCHOOL POLICY - Nor formal statements
-MAINTENANCE REQUISITION FORM - Both blank forms PMPC.PE.EG. and Current Copies
                of Requisitions to Board PM.PE.PC.
-DAMAGE AND BREAK-IN REPORTS - Current. PE.PM. copies + blank forms.

$D_{1,3,3}$ USE OF SCHOOL EQUIPMENT BY THE STUDENTS

-BOARD POLICY - Principal's Board Policy Manual.

$D_{2,1,1}$ INTRODUCTION CF A NEW PROGRAMME

-COST FACTOR - PE.PE. "Science Curriculum" - elementary Science Curriculum
& resources required by it. School Science Equipment
Inventory.

-GENERAL ABILITY LEVEL OF CHILDREN AND THEIR NEEDS:-
PC. "Reading Program" - Survey results of pre-reading
achievement.
- Gates reading survey Gr. 3-10, (materials and
scoring sheet).
- summary of reading handicaps ad their diagnosis.

-RESOURCES AVAILABLE AND REQUIRED -
(For Inventories of existing equipment held and
supplies see under INVENTORY $D_{2,2,4}$)

For Resources required:-
PC. "Reading Program," - order forms for texts.
PE. "Art":- outline of elementary Art program with
suggested classroom equipment and supplies.

PE,PE. "Science Curriculum" (see above in cost factor).

For resources available, every school has a collection of supply catalogues
(eventhough direct ordering no longer occurs) and also has access to or
possesses the Min. of Ed's lists of recommended texts.

-SOCIAL IMPLICATIONS - nothing filed.

-COMMUNITY IMPLICATIONS-

EG. "Planning the Kindergarten Program":- Helpful hints
to parents from principal.

-CURRICULUM DEVELOPMENT RESOURCE LITERATURE - PC.PE.EG.PM.
Inspirational curriculum development literature for
various programs, eg.g. Art, reading, Maths,
social studies, etc. (From a variety of sources, e.g.
Workshops, conferences, Institutions, board committees).

-BOARD CURRICULUM COMMITTEES' REPORTS -
PM. "Curriculum Committees etc." - membership lists,
addresses, notices of meetings.
PE. "Curriculum Development":- literature re local
curriculum development.

PE. "Curriculum Committee Reports:" - set of minutes of a
meeting.

PE. "Science Curriculum":- includes science curriculum Committee
minutes and inventory of equipment needed.

PE. "Science":- science teacher's correspondence re
curriculum development.

$D_{2,1,2}$ PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DECISIONS

-NEEDS OF THE SCHOOL AND COMMUNITY -

> PC. "Philosophy of Education - Dufferin County":- schools aims and objectives + teachers' aims & objectives.

> PC. "Board Policy, Information and Regulations manual".

> PM. "Aims & Objectives (1972-73)":- 2 page memo from principal for teachers' and parents' benefit.

> PE. " -teachers' submissions for the statement of objectives required in the September Statistical Report.

-FACTORS AFFECTING THE CHANGE -

> PC. "Continuous Progress":- board policy and evaluations of continuous Progress.

> PE. "Science Curriculum":- "includes directives from board office re adoption of new program.

-RESOURCE NEEDED FOR CHANGE -

> PE. "Science Curriculum" - describes equipment needed and supplies.

> PE. "Art":- suggested classroom equipment for elementary art program.

-PHYSICAL REQUIREMENTS OF THE SCHOOL TO ADAPT TO SUCH A CHANGE - Nothing.

-COMMUNITY COOPERATION - mainly circulars informing parents of changes.

-RESEARCH FINDINGS & REPORTS OF CURRICULUM COMMITTEES. -

> PE. "Science Curriculum":- includes Science Curriculum Committee minutes.

> PE. "Curriculum Committee Reports":- set of minutes of a meeting.

> PC. "Special Reports from Board."- reports on Special Education, various studies undertaken and their recommendations.

-GENERAL CURRICULUM GUIDELINES & DIRECTION -
Curriculum guides, notes, papers, etc. re various programs e.g. Art, Maths, Music, Lang. Arts, Science. Also more general directions for program development, i.e. objective setting, testing, curriculum planning 'for teachers and curriculum committees' use).

$D_{2,1,3}$ WHAT WILL ELECTIVES (IF ANY) BE?

-INTEREST OF TEACHERS -

        EG "Electives":- club/teacher/room list.
        EG "Summary of Resource Personnel":- includes list of
           teachers with specialisations.

-INTEREST OF PUPILS-
        PC. "School Activities - Schedule etc.":- includes list of
           students in Gr. 7, 8 and their elective(s) e.g.
           woodcarving, aeroplane modeling, drame, sewing, etc

        PE. "Electives":- (same as PC above).

-FACILITIES -
-PARENT INVOLVEMENT (COMMUNITY) - EG.PM. "Parent-Teachers Aid," =
-TIME DURING DAY -   list of volunteering help.
        PC. "Timetables":- All schools have teachers' timetables
           available.

-ECONOMIC REQUIREMENTS:- nothing found.

$D_{2,1,4}$ ASSESSMENT OF ONGOING PROGRAMME

-EFFORTS (a) WRITTEN) teachers and/or students have these.
       (b) ORAL   )

-OBJECTIVES:-
        PC. "Reading Program":- gives skill level objectives.
        PE. PM. "Aims and Objectives":- principal's and teachers'
           submissions for the statement of objectivies on
           September Statistics.
        PE. "Primary Programme-Levels: - Description of objectives,
           levels, skills to be acquired.
        PE. "Science":- includes science program aims and
           objectives.
similarly   EG "Language Arts", EG. "Reading Program"

        EG. "Teachers' Guidebook 1972":- from principal to
           teachers, gives advice on program development,
           objective setting, evaluation etc.

-RESOURCES -

        PM "School Supplies File:- Art Supplies (Sept-Dec), Office
           Supplies, Audio Visual supplies, Books.

        EG. PM. "Audio-Visual":- includes capital equipment inventory.

        PM. "Equipment: Capital & Replacement Requests 1969": - now
           mostly obsolete except to answer such questions as,
           how old is the typewriter?

PM.   "Film strips, records, etc.":- list of films reviewed (mostly 1969).

PM.   "Parent-Teachers Aid":- list of parents volunteering help.

PM.   "Resource Centre":- Description of new library and resources available + list of library books on order (from librarian).

PM.   "Usable Texts and Supplies,":- inventory of usable textbooks from each class teacher (beginning of year).

PE.   "Back Orders":- Teachers' classroom games' orders and other miscellaneous equipment.

PE.   "Capital-Audio-Visual-Text orders: - similar to "back-orders" (above) + invoices of equipment.

PE.PE. "Films" & Filmstrip Library";- list of films held by subject area/level - No. of copies & name.

       Also evaluation slips for films viewed.

PE.   "Science Curriculum":- includes supplies and equipment requirements of this program.

PE.   "Spelling Survey":- explanatory & testing materials for using and scoring the Buffalo Spelling Scale.

EG   "Cassette Tapes List":- list of titles.

EG.   "Parents-Volunteer Work": - recruitment literature, + list of possible tasks volunteers might undertake.

EG.   "School Equipment & Serial No.":- equipment (e.g. furniture) inventory, gives Article, description, serial No. - (Probably out of date)

EG.   "Spelling Test":- copies of standardized spelling tests.

EG   "Teaching & Reading Aids":- includes text-book lists.

EG   "Textbook Orders (1972)":- Ministry of Ed. catalogues of approved text-books for each grade level.

EG   "Textbook Survey (FALL-SPRING 70-71)" - lists by room.

PC   "TEST MATERIALS":- standardized blank test forms, e.g. IOWA Basic Skills.

PC   "Audio-Visuals" - correspondence & Advertising from Film Suppliers.
                    - evaluation forms for ED T.V.
                    - list of available films.

PC   "Supplies":-   - Summary of capital requisitions + set of consumable order forms, e.g. for paper, plasticene, newsprint paint.

59. "Instructional Supplies":- forms supplied to teachers for them to
          indicate class supply requirements (from catalogues). These
          are collected by vice-principal, aggregated and sent to central
          office.

For <u>teachers</u> considered as programme resources, se $D_{3,1,2}$ for lists, evaluations,
          etc.

-SUITED TO INDIVIDUAL -
          PE.   "class profiles":- from teachers to principal, problems
                       of a group or individual nature.

-INTEREST-

-USE OF TIME -   PE. PM. PC. "Timetables":- one per teacher.
                     PM. "Home Instruction:- summary of time spent on
                          Home Instruction in 1970.

-INVOLVEMENT - There exists a board form called "Evaluation of School
          Programme" PE, not sure how it is used because have only
          found blanks. Seems to be primarily for the evaluation of
          teachers rather than programmes.

-SKILLS ACQUIRED - in addition to O.S.R.'s and progress reports there are
          the following information sources:-

          PC "Marks-Report Cards";- end of term marks from each teacher.

          PM "Term Report Cards & Mark Sheets":- end of term marks for
                                                  each class.

          PM "Standardized Tests":- lists of student scores on various
                                     standardized tests.PE

          PE Student Achievement records:-

          PE "Continuous Progress-Reading":- skills booklets level system
                                              reading program (sample)

          PE See INVOLVEMENT above.

- PRE-PROGRAMME ACHIEVEMENTS -

          PC "Reading Program" - includes results of survey of -pre-reading
                                  achievement and how acquired,

- PE.PM.PC. "Course outlines" prepared by teachers for review by principal.-
          variety of programmes stored together.

$D_{2,1,5}$ <u>DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR</u>

- USE OF $D_{2,1,4}$ INFORMATION SHEET - We have not found such a sheet anywhere.

- NEW SITUATIONS WHICH HAVE DEVELOPED -
          PM "Additions to School":- progress of present buildings and
                                      plans; Proposed uses of additional
                                      space.

- ADVICE OF REGIONAL PROGRAMME CONSULTANTS -

> EG.PE. "Programme Consultants":- file contains:- completed 'Request
> for Consultation' board forms
> - list of programme consultants and their specialities
> - principal's notes and reporting of past visits
> - visiting schedule for the year.

- TEACHERS' COURSE OUTLINES/PLANS

> PE   Informal submissions of long range plans from some teachers.

> PE.PM.PC   "Course outlines" - (see above)

$D_{2,1,\iota}$ ADJUSTMENT OF PROGRAMME

- COST - no breakdown of cost for specific programmes (either past or future)
  has been found.

  - However by referring to Requisition and inventory data (see BUDGET
    section) the principal could estimate additional costs.

-- ADAPTATION TO PHYSICAL PLANT

> PM "Additions to School":- progress of present building and plans;
> proposed uses of additional space, etc.

> Other sources of information concerning physical plant would be
> found in Requisition and inventory data (BUDGET SECTION)

- ASSESSMENT OF PRESENT PROGRAMME -

> No summary of the disaggregated data described in $D_{2,1,5}$ and $D_{2,1,4}$

- ADAPTATION OF TEACHER TIME -

> PM.PC. "Timetables"- Current teachers' and principals' timetables
> (only upper grades on rotary so teachers mostly
> in their permanent rooms)

- ADAPTATION TO SKILLS & SPECIALITIES OF TEACHERS (Both OLD and NEW)

> Main source of information on current teaching staff's certification
> and specialities is the boards Teacher Record Cards. PC.PM.EG.EG.PE.

> Also for newly hired teachers: -

> PC. "Teacher Applications":- Copies of board "Teacher Interview
> Forms

> - principals confidential report on
> applicants who had been interviewed

"Teacher Information"

PM.EG.   "Summary of Resource Personnel":- list of teac... specialists.

- ALTERNATIVE INSTRUCTIONAL MATERIALS - (e.g. lists and, catalogues of films,
        textbooks, equipment, etc.)

        This kind of material forms a large portion of the files. Sometimes
        the information is filed under

a) programme or curriculum heading:
        e.g. PM Special Education PE "Mathematics" PE "Science Curriculum"
        PE "Summer Programme"

b) equipment type:-

        e.g. PC.EG. "Audio-Visuals", PE. "Novels" - EG Film information
        EG "Novel list" (by suggested grade level) EG. "Textbook
        orders (1972)":- (ODE catalogues of textbooks by grade level)
        EG "Textbooks - ODE Circular 14":- (index of approved texts ODE).
        EG "Cassette Tapes List":-

c) separate catalogue files - usually filed alphabetically by suppliers name,
        but sometimes by subject e.g. "Athletics". Since there is
        no direct ordering (to suppliers) now these catalogue files
        are not used much except about once (or twice) a year for
        making up requisition forms for textbooks, films, etc. The
        suppliers still send catalogues to the school.

$D_{2,1,7}$ ADJUSTMENT BROUGHT ABOUT TO OR BECAUSE OF $D_{2,1,2}$

- COMMUNICATION OF SCHOOL & BOARD POLICY TO PARENTS, TEACHERS, STUDENTS

        PC   "Continuous Progress" - includes memos to parents explaining
                                this philosophy.

        PE   "Board Minutes" PE "Kindergarten Correspondence" - from
                                kindergarten teacher and principal to
                                parents, telling what clothing and
                                equipment is required.

        EG.PE "Letter to Parents - Level system":-

        EG "Parents Letters to Principal":- copies of letters sent to
                                parents.

        EG "Teacher's Guidebook 1972".- principal to all teachers, giving
                                advice on program development,
                                evaluation, etc.

$D_{2,1,8}$ AREAS OF SCHOOL CONCENTRATION

- GRADE (OR YEAR) CONCENTRATIONS - NUMBERS -

        Generally this information is regularly prepared for the monthly
        attendance reports & the Sept. Statistical Report.

Also filed under

       PC "Enrolment" - past enrolments (by grade) and projection for
                 this year.

       PC "School Organization":- copies of the reports sent to super-
                 intendant of Education (MARCH), giving present
                 organization and Sept. organization i.e., Table
                 of grade Enrolment Teachers (form G.49)

       PC "Attendance Record Book" - running record of Date of Registration,
                 Grade of Entry, Name, From, To, Total enrolment.

       PC "Class Registration Books" also could be used to obtain grade
                 concentration

       EG "Classroom Lists":- ordered by grade and alphabetic within.

- ACADEMIC NEEDS OF STUDENTS -

       PC "Reading Program":- gives results of a pre-reading achievement
                 survey.

     EG.PC "School Activities-Schedule etc.":- gives student electives
                 (gr. 7, 8) e.g. woodcarving, drama, sewing etc.

       PE "Class profiles" -- in JAN. each teacher sends an account of
                 class problems of a group & individual nature.

- QUALIFICATIONS OF TEACHERS -

       Main source is Teacher Record Cards file (see $D_{2,1,6}$ (ADAPTATION
       TO SKILLS....) and September Reports
       PC.PM.PM.PE.EG.

- PHYSICAL CAPABILITIES OF SCHOOL PLANT -

       PM "Floor Plan of School"   PE "School Map".
       PM "Resource Centre":- Description of new library and resources
                 available

       PE "Rated capacity of each School":-

$D_{2,1,9}$ EXTRA CLASS LEARNING - ATHLETIC ASSEMBLIES ETC.

- PLANT CAPABILITIES: -

       PC "Swimming" - receipts for rental of pool

       PM "Floor Plan" of school.

       PM "Hockey Rules & schedules":-rental of rink correspondence.

- TIMETABLE AVAILABLE TIME IN LEARNING AREAS -

    P∴PC "Field Day":- includes past schedules and programme

      PC "School Activities-Schedule etc.":- variety night programme,
                                              Easter Play.

   PM.PC "Timetables":- current teachers timetables, one per teacher

      PM "Calendar of Events" (1972-73):- 2 timetables about special
                                        services personnel visits

      PE "Concerts":- programmes for Closing Assembly 71 & variety night 72

      PE "Hockey":- inter-school schedules

      PE "Playday 1971":- schedule

      PE "Routines Booklet for opening week":- general information for
                                        teachers on opening day

      PE "Sports Rules":- Field day program

      PE "Spring Concert" (72):- Programme

      PE "Track & Field":- schedules

      PE " Winter Carnival (71)":- dittos of timetables

      EG "Fall Fair-Orangeville": programmes

      EG "Field Day Information":- timetable of events

      EG "Playday":- old programmes for playday.

- NUMBER OF CLASSES:-   ?

- AGE AND/OR GRADE LEVELS:-

      PC "School Activities - schedule etc.":- student electives by grade

      PM "Electives":- lists of students with given elective, grade and
                                      class where held.

- STAFF NEEDS (& - ASSIGNMENTS):-

   PE.PM "Extra Curricular Activities of Staff":- staff assignments to
                                      sports and yearbook; safety patrol, kitchen, etc.

      PE "Opening Day":- procedures to be carried out by principal &
                                  teachers on opening day, - duties, chores, etc.

      PE "Routines":- Booklet for opening week - general information for
                                teachers on opening day.

- RESOURCE LITERATURE ON EXTRA-CLASS ACTIVITIES -

    PC "Newspaper in classroom":- notes on doing a class newspaper.

    PM "Play-day":- lists of fun activities for kindergarten Play Day.

    PE "Fund Raising": - suppliers catalogues of gifts etc. for fund
                  raising activities.

    PE "Rememberance Day File":- suggestions as to activities to be
                  undertaken on R.D.

    PE "Winter Carnival":- various materials associated with winter
                  carnival + prize essays & poems.

    EG "Fall Fair-Grand Valley":- submissions and activities list.

    EG "School Newspaper" (72-73):- 1 copy as an example.

    EG "Student Council (72-73)":- agendae of meetings, procedures for
                  election of members.

$D_{2,1,10}$ FIELD TRIPS, COST, TRANSPORTATION ETC.,

- OBJECTIVES OF TRIP:-

    PC.EG.PE "Report of excursions":- notes on visit to Ottawa, includes
                        objectives of trip   PM

  PC.EG.PM.PE. "Overnight excursions (Request Form)" PM - copies of "Request
    EG.   for overnight excursion",forms (G37), which
                      should include objectives of trip.

    OBJECTIVES, LENGTH OF TRIP, LEARNING ACTIVITIES, FUND RAISING ACTIVITIES,
    COST AND TYPE OF TRANSPORTATION, COST OF OVERNIGHT ACCOMMODATION, are all
    covered by the two Board forms. However it is not clear why there should
    be two forms since an 'overnight excursion' PM is just another type of
    excursion with extra (accommodation) costs and teacher supervisory duties.
    Also the title 'REPORT ON EXCURSIONS' PM is somewhat misleading since it
    is really a request form completed before the trip. In fact there does
    not appear to be a formal post-trip reporting procedure or form.

- PARENT INVOLVEMENT -

    EG.PM Some schools have "Bus permission slips", which are taken home
           by children intending to go on an excursion by bus, and are
           returned with the consent and signature of the parents.

- WHO WENT WHERE ?

    PC Who went where last year - student lists.

- CORRESPONDENCE & LITERATURE ON POTENTIAL EXCURSIONS

    PC "Correspondence on Excursions":- notes and brochures, pamphlets on places to go in Ontario

    PC "Tours":- Brochures on tours in Ontario + yearly tour plan for various grade levels.

  PE.PM "Excursions":- includes literature on places to go.

    PE "Ontario Science Centre":- promotional literature from OSC

    EG "Outdoor Education":- Curriculum bulletin from ODE i.e.'Education outside the classroom'

                    - schools own programme of field crips.

                      - memos from ODSS re the 'See Dufferin first' project.

$D_{2,2,1}$ **BUDGET, TWICE YEARLY MATERIAL** (TEXTS, LIBRARY, CONSUMMABLES, SPEC. ED.)

- NUMBER OF PUPILS -- REGULAR CLASS, SPECIAL ED. -

        Many sources of this data, e.g. class lists, monthly attendance reports, registers, etc.

- SPECIAL NEEDS OF TEACHERS FOR SPECIAL PROGRAMME -

PC.PC.PM   Filed under a variety of headings; i.e. Consumable Order Forms,
PE.PE.EG   Instructional Supplies, etc.

        It seems that principals circulate to each teacher, either their cwn dittoed Budget requirements form, or, copies of the Maintenance Budget Request forms, which are then completed and returned to either Principal or Vice-principal to be aggregated on a single master copy "Maintenance Budget Request" form and sent to Board Office. The data requested by the principal is usually suppliers name, catalogue no., quantity, item description, unit price, total price, room, grade. (samples can be found in school folders).

        Also most schools have back copies of the completed Maintenance requisition forms which were sent to the central office.

- EXISTING SUPPLIES -

    PC "Supplies":- summary of capital requisitions NOV 71

    PM "Inventory":- lists of current texts held with price & quantity.

                Also Quantity, ITEM, purchase date, original cost, of classroom equipment.

EG. PM. "Budget - Supplies & Texts (consumable)":- Computer printout
from board giving school's monthly expenditure and remaining
budget funds.

EG. PM. "Purchase Orders (72-73)":- from board for verification of
reception of orders:- sent back to central office upon
receipt of supplies. See sample G.58 (central office Forms).

PM. "Usable Texts and Supplies":- inventories of number of usable
textbooks from each class tea her.

EG. PE. "Consumable Order":- out of date back copies of Main Budget
requests.

EG. PE. "Invoices 1971-73"; - package slips and invoices for delivered
equipment and supplies, to check requisition & budget statements.

EG. "Novel List (Sept. 72)":- extra novels in stockroom with
suggested grade level.

EG. "Textbook Survey (FALL-SPRING 70-71)":- lists by room.

EG. "Textbook Order (1972)":- schools own textbook order record book,
giving quantity, unit cost, total cost, suppliers' name.

- PROJECTION OF NEEDS -

PM. "Catalogues":- used for estimating prices and seeing what new
Drawer   supplies & equipment are available.

PE. "Requisitions (72-73)":- current requisition forms from each
teacher for JAN 73. Budget.

EG. "Textbooks - ODE Circular 14:" Index of approved textbooks. (by
grade level).

EG. "Textbook Survey (FALL-SPRING 70-71)":- lists by room.

EG.   "Science-Resource Materials":- ODE intermediate science guidelines,
price lists of equipment, science text book lists.

Projections of future needs might also be done by referring to past Maintenance
Budget Request forms (see SPECIAL NEEDS---above) and extrapolating.

-ACCOUNTING -

PE. "Back Orders":- list of back orders to supplier firms and which
classes requested the order, to check that deliveries
requested were made.

$D_{2,2,2}$ BUDGET TWICE YEARLY MATERIALS/INDUSTRIAL ARTS.

Nothing found.

$D_{2,2,3}$ BUDGET ONCE YEARLY MATERIAL-SPORTS EQUIPMENT

- EQUIPMENT INVENTORY -

      PE. "Jack Watson - SHORTS-T SHIRTS":- Invoices for sports purchases.

      EG "Sports Inventory":- inventory of sports equipment (1972).

- NEEDS AS RELATED TO PROPOSED PROGRAMME -

      PC. "Physical Education":- general information plus suggested equipment
          list.

- PROJECTED COST FACTOR -

      PC. "Swimming":- receipts for rentals of pool.

      PM, etc. Equipment catalogues, giving prices.

$D_{2,2,4}$ BUDGET ONCE YEARLY MATERIAL

      (Audio-Visual, Capital Equipment, Oral French, Remedial and Enrichment,
      Music, Science Supplies & equipment, art, novels.)

- INVENTORY OF PRESENT EQUIPMENT -

      EG.PM.PC. "Audio-Visuals":- includes lists of films available.

      PC. "Capital Equipment":- copies of budget requisitions to board.

      EG. PM. "Inventory": classroom equipment lists with room no. quantity,
          Item, purchase date, original cost.

      PM. "Kindergarten:-" list of equipment used with prices.

      PE. "Instruction Budget":- short inventory of special equipment (replacements)
          for 70-71 with suppliers' name and price

      PE. "Science curriculum":- includes Inventory of Science equipment.

      PE. "Films":- includes list of films available at school until Oct.

      PE. "Filmstrip Library":- list of films available at school until Oct.

      PE. "Filmstrip Library":- list of films held by subject area and level -
          No. of copies, title.

      PE. "Long Range Plans- 2nd Term":- informal curriculum plans of teachers.

- PROFESSIONAL DEVELOPMENT INVOLVEMENT -

PM. PC. "Teachers Record Cards" - contains current qualification and certification
      of teachers.

- TEACHERS SELF APPRAISAL OF CLASS PROCEDURES.

      PM. Standard school form. prob. obsolete 90

- REPORT ON PROBATIONARY TEACHER (Board Forms). G.31

    EG. "Teacher Reports - Confidential-Current:- Suptl of Curr. reports.

    PE. Teacher Reports - Past: - evaluation notes on Prob. Teacher by Princ.)

    PE. Probationary Teachers (Rating Forms):- (master ditto).

    PE. Principals' Anecdotal File - Teachers.

- PRINCIPAL'S REPORT ON CLASSROOM VISITATION -

    PC. "Classroom Visitation" - 1 copy to teacher, 1 board, 1 retained.

- TEACHER EVALUATION FORMS - (Board form may be obsolete).

PE.PM. "Evaluation":- Current evaluation form (blank) to assist principal in
             teacher Evaluation + notes & teacher evaluation procedures.

$-D^{*}_{3,11}$ ASSESSMENT OF PRACTICE TEACHERS.

    PC. "Teachers College":- copies of student teacher appraisal reports (from
    PE   Principal and Associate Teacher to College) + handbook for
          practice teaching program.

    PM. "Practice/student Teachers":- Records of No. of practice teachers
         and No. of hrs. each spent teaching, + evaluation record forms
         (appraisal reports).

$D_{2,2,5}$ BUDGET, WEEKLY MATERIAL - HOME ECONOMICS

    Nothing found on - Long Range Plans
                 - Short term plans
                 - No. of Students involved
                 - Suppliers -- Cost.

But add:-

    EG. PM. "Petty Cash: 72-73" - record of expenditures ($50 float) - monthly
         statements to board -
    EG. EG. "(Milk) Account:- receipts and cheques from Diary for student milk.

         "Acct.":- cancelled cheques for groceries & miscellanea.

    EG. "Phone Calls":- Booklet of long distance phone calls (by staff)
         - date, called - purpose.

$D_{3,1,1}$ ASSESSMENT OF PROBATIONARY TEACHERS & ASSESSMENT OF PRACTICE TEACHERS

- TEST MARKS OF STUDENTS (COMPARED TO PREVIOUS) -

    PC. PM. "Term Report Cards & Mark Sheets" for 2 years.

    PM. "Standardized Tests":- lists of student scores on various tests -
         usu. reading.

EG. "Special Test Results": - standardized tests Gr. 4-7.

- TEST MARKS OF STUDENTS (COMPARED TO OTHER STUDENTS) - OF SAME LEVEL.

> cces as above - particularly standardized tests:

-ATTITUDES (OBSERVABLE MEASURABLE) OF STUDENTS -

PE. Principals anecdotal file:-

PE. "Class Profiles":- 1st JAN. - teachers report on problems of you group or individual nature in his day

-CURRICULUM DEVELOPMENT INVEOLVEMENT -

PM. "Subject Outlines (70-71)":- teachers course outlines & curriculum notes.

EG. "Cassette Tapes List":- list of tapes (titles held).

EG. "Map Inventory":- list of maps (titles held)

EG. "School Equipment & Serial No.";- office & classroom, staffroom Library furniture. (Article, description, serial no.)

- OBJECTIVES OF THE PROGRAMME - see $D_{2,1,4}$.

- NUMBER OF STUDENTS TO TAKE PART -

- REPLACEMENT OR NEW -

This information could be obtained from current requisition forms. PC.
PM. and Inventories, invoices etc.
Plus PM. "Equipment: Capital & Replacement Requests "1969":-
- Now obsolete except for references such as how old is typewriter?"

PM. "Purchase Orders (1972-73)":- from board for verification of reception of

PE. "Capital":- (old maintenance budget Requests.)

PE. "Capital - Audio Visual - Text Orders":-

EG. PE. "Invoices": 1971-73":- packa g e slips and invoices to check requisitions and budget statements.

EG. PE. "Maintenance - Budget" etc.:- Maintenance Budget requests - Capital Items.

EG.PE. "Requisitions (72-73)":- Current requisition forms from
        teachers - i.e., for JAN 73.

EG. "Purchase Orders":- (Current Purchase orders (blue form)
        invoices, packing slips, etc.

- SCHOOL BANK ACCOUNT (YEARLY STATEMENT) -

PM. "School Bank Account": - for end of year accounting report (JUNE)
     - Debit - credit - statement.

APPENDIX D

SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision	1	What courses to list on the option sheet	once a year	Jan	Curriculu
"	2	What format of option sheet	once a year	Fall	Curricul
	3	What courses to offer when results of option sheets are known	once a year	Feb	Curriculu
"	4	How many sections of each course to offer	once a year	Feb	Curriculu
"	5	What rooms to assign to each course	once a year	Mar	Faciliti
"	6	What teachers should be hired, based on teacher-pupil ratio	once a year	Mar	Recruitm
"	7	How many times to advertise each position	as need arises	March - June	Recruitm
"	8	What ratio of teacher to paraprofessionals to fill teacher-pupil ratio	once a year	Feb	Recruitm
"	9	How many classes should each teacher teach	once a year	Feb	Curricul
"	10	How many classes should Department Heads teach	once a year	Feb	Curricul
"	11	How many classes should Program Supervisor teach	once a year	Feb	Curricul
"	12	How many classes should Vice Principal teach	once a year	Feb	Curricul
"	13	How many classes should Chairman teach	once a year	Feb	Curricul
"	14	How many classes should Assistant Department Head teach	once a year	Feb	Curricul
"	15	How many classes should Principal teach	once a year	Feb	Curricul
"	16	What classes each Vice Principal is responsible for discipline and attendance	once a year	June	Attendan

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision	17	What classes is Principal responsible for discipline and attendance	once a year	June	Attendanc
"	18	What subjects belong to each area of study	once a year	Spring	Curriculu
"	19	What should the format of course description booklet be	once a year	Fall	Curriculu
"	20	How many parents night should there be	once a year	Sept	Public Relations
"	21	Should there be a dress code for the school, for students	once a year	June	Student Service
"	22	Should there be a dress code for the teachers	once a year	June	Public Relations
"	23	Should attendance be compulsory for those over 16	once a year	June	Attendanc
"	24	Should attendance be compulsory for those over 18	once a year	June	Attendanc
"	25	Should classes be cancelled if teachers are absent	once a year	June	Attendanc
"	26	Should Department Heads have autonomy on assigning classes to teachers	once a year	June	Professic
"	27	Should Department Heads have autonomy in curriculum	once a year	June	Professic
"	28	Should Department Heads have autonomy on field trips	once a year	June	Professic
"	29	What budget requirements should be submitted	once a year	Fall	Budget
"	30	What should be the r... of capital to supplies budget	once a year	Fall	Budget
"	31	How should the budget be divided by department	once a year	Jan	Budget
"	32	Should Department Heads have autonomy on the budgets	once a year	June	Budget

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Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decisions: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision	33	When decisions are made by Senior Administration which you don't approve, when should you; (i) ignore (ii) follow without discussion (iii) protest mildly (iv) protest vigorously (v) blow your stack	as they occur		Personnel
"	34	Should you have examinations	once a year	June	Curriculu
"	35	How often should you have examinations	once a year	June	Curriculu
"	36	When should you have examinations	once a year	June	Curriculu
"	37	Should evaluations be left to the Department Heads	once a year	Sept	Curriculu
"	38	Should there be promotion meetings	once a year	Spring	Curriculu
"	39	What should the promotion policy be	once a year	Spring	Curriculu
"	40	Should teachers be at school during examinations if they are not presiding	once a year	Fall	Personnel
"	41	Should summer school be encouraged	once a year	June	Curriculu
"	42	Should free time for students be encouraged		all year	Attendanc
"	43	Who should be given permanent contracts	once a year	Spring	Personnel
"	44	Who should be fired	once a year	Spring	Personnel
"	45	Who should build the time-table	once a year	Fall	Facilitie
"	46	Where should computor assistance be purchased	once a year	Fall	Facilitie
"	47	Should students be allowed to change or drop courses	once a year	June	Curriculu
"	48	Should school participate in sports	once a year	Spring	Ext. Curr.

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Name: J.J. McFadden

Title: Principal - O.D.S.C.

Assign a No.	Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision 49	What sports should school participate in	once a year	Spring	Ext. Cur.
50	Can time be taken off class for an extra curricular activity	as they occur		Ext. Cur.
51	Should the buses be called because of a snow storm	as they occur		Transportation
52	When should there be a fire drill	as they occur		Facilities
53	When should there be an assembly	as they occur		Student service
54	How many school dances are allowed	once a year	May	Ext. Cur.
55	When should Commencement be held	once a year	Spring	Student Service
56	What should be the format of the Commencement	once a year	Spring	Student Service
57	Should approval from the Ministry be obtained for a course	as they occur		Curriculum
58	Should approval from the Ministry be obtained for a text book	as they occur		Curriculum
59	How much autonomy should be given Department Heads for curriculum	once a year	Spring	Curriculum
60	How much autonomy should be given the Librarian	once a year	Spring	Student Services
61	Should the library be opened at night'	once a year	Sept	Student Service
62	What procedures should be used for visitors to the school	once a year	June	Student Services
63	What Home Room system should be used	once a year	Spring	Student Service
64	How should attendance be managed	once a year	June	Attendance

Name: J.J. McFadden

Position: Principal - O.D.S.S.

A...		Dut... ...			Aswi...
De..sion	65	How much say ... .. Department Heads have i sel.. on of .eachers	once a year	Spring	Recruitm...
"	66	How many sec .... should there be and what sho ... do. .is is under guidelin... Board	.nce a	.ne	Personnel
"	67	How should ... ... developed professiona..	various tim...		Professi... Developm...
"	68	When shoul.. ..s ... ..air .g be done	... .nce a	June	Profess... Develop...
"	6..	What inser ... ... .g sh... take place	as ne.. arise		Professi... Developm...
"	..	What dutie... ... ...les .mals do	once .. ye..	.ring	Personnel
"	71	Who should	once ... year	.une	Personnel
"	72	.hen shoul ... ... be used	once a year	.une	Faciliti...
"	73	.hen shoul .... .. be sent to visit at another	as need arises		Professi... Developm...
"	74	Should studen ... .. ven a Credit a. a lower level .. .. .ccessful in a more diffic..l	once a year	..ne	Curricul...
"	75	Should sta.f be ma.. of things like budget, plann.. Board policies, etc. or should the a m... .e be that the less they know .. better	once a year	anytime	Personnel
"	76	Should the Principal meet with the Student Council?	once a year	June	Student Services
"	77	Should projects .. .de for the County in the Sh....	once a year	Sept	Curricul...
"	78	What recommendations go to the Senior Administration for .nting or buying captial equipment	once a year	Fall	Faciliti...

0.. 9..

Name   J.J. McFadden

Position   Principal - O.S.S.S.

					Area of
Decision		What supervision of teachers policy should be followed	once a year	June	Personnel
"	80	What policy changes should be recommended to Senior Administration	as need arises		
"	81	When should staff meetings be held	as need arises		All areas
"	82	What committees should be appointed	as need arises		All areas
"	83	What salaries should be recommended for non-teaching staff	when requested		Personnel
"	84	What salary should be requested for Principal	once a year	March	Personnel
"	85	What innovations should be pursued	as need arises	Spring	All areas
"	86	Should all students write final exams	once a year	Fall	Curriculum
"	87	Who should write final examinations	once a year	Fall	Curriculum
"	88	If a student passes final examination should he receive credit for the course	once a year	Fall	Curriculum
"	89	What should be done the first day of school	once a year	June	All areas
"	90	How much authority should be delegated to the Head Secretary	once a year	June	Personnel
"	91	Should the school office be open 12 months of the year	once a year	June	Staff Services
"	92	Should a semester or trimester system be operated	once a year	Fall	Curriculum
"	93	What parking arrangements should be made for students	once a year	Sept	Student Services
"	94	Who should have keys to the school and each area in the school	once a year	June	Personnel
"	95	How long should the periods be	once a year	Spring	Facilities

Decision	96	Should there be bells in the school	once a year	Spring	Faciliti
"	97	Should students be allowed to take employment before the end of school	once a year	Spring	Student Services
"	98	Should a smoking area be in the school	once a year	June	Student Services
"	99	What method should be used for handling text books	twice a year	Sept & June	Student Service
"	100	How should lockers be issued to students	once a year	June	Student Service

CENTRAL DUFFERIN D.H.S.

Name: D. G. Anderson

Title: Principal

Assign a No.	Decision: give a name and a brief description	Frequency	Time of Year	Area of Decision
1	Designing student course booklet	once a year	Nov.	Pupil Servic
2	Pupil Course Requirements	once a year	Jan.	Pupil Servic
3	Economic Feasibility of Course	once a year	Feb.	Logis
4	Staff needs in hiring	once a year	Mar.	Personnel
5	Assigning Staff to Specific tasks for year--promotion	once a year	May	Pupil Services
6	Planning Grade VIII Integration	As need arises	May-Sept.	Pup. Logisting
7	Allocation of Budget-Supplies and Capital	yearly	Dec.	Logi
8	Review of Budget Spending	monthly	Sept.-Aug.	Log.
9	Method of Reporting to Parents	yearly	May/June	Stud
10	Promotion Policy	yearly	May	Stu
11	Number of sets of exams	yearly	June	Stu
12	Agenda for staff meetings	monthly	Sept.-June	Log
13	Evaluation of Staff	yearly	Mar.	Per
14	Facility-use	as need arises	Sept.-June	Logis
15	Maintenance of facilities	yearly	Feb.	Logisti
16	Busing - cancellation due to WX	as need arises	Dec.-April	Logistic
16a	Busing - normal	as need arises	Sept.-June	Logistics

Name: D. . Anderso.

Title: P. -cipal

As .gn a .	Dec... give a name and a br... ....ption	Frequenc.	Time of ..ar	Area of Decision
.	C. .. .. Arrangements	yearly	.. ....	Pup.l S. .ices
.8	. handling text	yearly	.une	P.. .l ..ices
	... ..llecting books	yearly	...	Pu... Ser.
...	Op. . .... Procedures	yearly	.une.	Pup. Ser. Personnel
..	Il .. Day Procedures	yearly	M...	Pup. Ser. P .rsonnel
C	Ex. ...netables - allocation .f ...nts	as need arises	Dec. Mar. Ma.	Pupil S. .rvices
2.a	.xa. ..netables - allocation .f ... . residing	as need arises	De. Mar. Ma	Personnel
..	Stude.. Conduct	as need arises	Sept- June	Pupil Services
..	Inter..etation of regu...ons & policy	as need arises	Sept- .une	Pup. Ser. Personnel
.	Designing Student Handbook	yearly	.pril	Stud. Ser.
.. ..	Student Projection	yearly	.an.	Logistics
	Student Assemblies/ Production	as need arises	.ept- ..ne	Student Services
9	Field Trips	as need arises	..pt.- ...	Stud. Ser. Logistics
.9	Special Staff Courses - Attendance	as need arises	S. .t.- Ju ..	Personnel
.)	In-Service staff programs	as need arises	Sep..- Jun.	Personnel
..	Staff to attend Curriculum Committees	yearly	Sept.	Personnel
32	Changes in curriculum-- course outlines to be used, new subjects to be offered	yearly	June	Stud. Ser. Personnel

Name: D. G. Anderson

Title: Principal

Assign a No.	Decision: give name and brief description	Frequency	Time of year	Area of Decision
33	Participation in school in athletics	yearly	Sept.	Stud. Ser. Personnel
34	Student council - Projects and Activities	as need arises	Sept.- June	Stud. Ser. Personnel

APPENDIX E

AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS,

INFORMATION REQUIREMENTS AND TIMING

PART ONE: SECONDARY PRINCIPALS' DECISIONS AND INFORMATION
            REQUIREMENTS

PART TWO: SECONDARY PRINCIPALS' DECISIONS (STANDARDIZED)
            AND TIMING

PART ONE

SECONDARY PRINCIPALS' DECISIONS AND

INFORMATION REQUIREMENTS

SECONDARY PRINCIPALS' INFORMATION REQUIREMENTS

DECISION	INFORMATION

1. ORGANIZATION
   A. To Open School

   1. What rooms to each course, (note special requirements)?
   2. Assign subjects to areas of study.
   3. Pupil course requirements.
   4. Where should and how much computer assistance be purchased.

Timetabling, Reporting, Recordkeeping
Recordkeeping - student achievement form
                         (OSR)
                - student info sheet
                - courses
Dept. of Ed. - on tape/P.O. to school
Access frequency - updates ANA
                - sometimes from Board, i.e.,
                  non-resident list
Budget - from D of E.

   5. Student projections

Base list from elementary schools by end
  of Feb. (new entrants), directly from
  elem. principals, also out-of-county &
  separate schools.

Geographic boundary - program variation
recommended by princ. after registration
(by end-Feb.)

Occupation recommendation - processed by
      Rogers - none at Center Duff. -
decision based on availability of space
at Orangeville.
Option sheets sent to elem.
Mfg. of feeder principals to get
Also pick-up info on migrants
Registration also in early Sept.
Info summarized for Board in connection
   with staffing (mfg. with Dir.)
Some projections from Board

   6. Scheduling of exams

Exam schedule compatible with other
  high school.

   7. How many teachers can be hired given
      teacher-pupil ratio?

See 1A5

E-1

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8. Ratio of Teachers to paraprofessionals	Some politics involved.
	Counts ½-teacher & must conform to fit ratio
	Salaries on ind. basis, discussed with Director
	Principals' perogative.
9. Who should build timetables?	Teachers timetables submitted to Board for info - arranging visits, etc.

10. Class load per teacher.
11. Class load for Dept. Heads.
12. Class load for Programme Supervisors.
13. Class load for Vice-Principals.
14. Class load for Chairman.
15. Class load for assistant Dept. Heads.
16. Class load for principal.
17. Autonomy of Dept. Head re assigning
    classes to teachers

B. Timetables

1. Exams, timetable.	P-T ratio conformity (economics)
2. Student handbook	May require Bd. or Ministry approval
3. List on option sheets - what is its format	(admin. council)
	Family life/religion
4. Pupil course requirements	Originates from Dept. Head, on option
5. What courses to offer (includes study of econ. feasibility)?	sheet, decision to go ahead depends on response
6. How many sections per course, includes study of econ. fees?	

B-2

C. Lockers   1. Method of locker distribution.

D. Home Room   1. What Home Room system.

E. Text Books

1. Method of Handling textbooks (distr.)	Textbooks - "caution fee", money to
2. Method of handling textbooks (collection)	Board or book rental fee.

	DECISIONS	INFORMATION

2. PROGRAMME

A. Budget

1. Budget requirements to be submitted.

Last year's budget & expenses; no projections for second half (Sept.-Dec.), Dept. heads est.; actual enrolments, transportation estimates.

From acct - ceilings, mill-rate effect, projected income.

Principals generally make decision based on advice from accts.

Monthly expense sheets from Board (prepared by EDP)

2. Best ratio of capital to supplies.

Capital = equipment (any item $50 which lasts more than 3 years)

Ratio interval, total $ value important.

Fixed (salaries, transportation, maintenance, plant operations, etc.) + capital/supplies - effect of latter on ceilings, grants.

3. What recommendation to Sen. Admin. for renting/buying capital equipment.

4. Allocation of budget (to departments)

5. Review of budget spending

6. Should staff be aware of budget, planning, board policies, etc.?

7. Maintenance of facilities.

To supervisor of plant, industrial plant improvements

Included in maintenance budget

Informal request, perhaps memo, more often oral

B. Curriculum

1. Autonomy of Dept. Head re field trips

Field trip (Form) - copy to Board

From Dept's budget (in supply budget)

2. Changes in curriculum, modify outlines

3. Field trips

See 2B1

4. Approval of courses, get from Ministry

Form from Director to Ministry

5. Approval of textbooks, get from Ministry

Form from Director to Ministry

E-3

	DECISIONS	INFORMATION

C. Promotion	1. Should students be given a credit in lower level if unsuccessful at upper?	Annual academic report: - promotion statistics
	2. Should students be allowed to change/drop courses?	- teacher development, certification inspection
	3. Promotion decisions.	- athletics, extra-curricular

3. STAFF

A. Hiring-Firing	1. Who should be fired?	Recommendation to Board. Consultation with superintendents.
	2. Who should be given a permanent contract?	As above.
	3. Hiring procedure.	Superintendent's report (from Dufferin official's contact with other Board)
	4. How many secretaries (based on board guidelines)?	Within guidelines (none) Recommendation to Board (Admin. Council)
	5. Salary of non-professional people.	See 3A1
B. Authority	1. How much autonomy do dept. Heads have in spending money?	
	2. How much autonomy to librarian.	
	3. How much say should Dept. Heads have in teacher selection.	
	4. Who should have keys to the school and what areas of the school.	
	5. How much authority delegated to head secretary.	
C. Duties	1. Duties of paraprofessionals.	
D. Promoting	1. Should all students write finals, who should write?	
	2. Pass final - gets credit?	
	3. Have promotion meetings.	
	4. What promotion policy.	
	5. Should there be exams?	
	6. How often should there be exams?	

E-4

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11 5

E. Professional
Development

1. When should in-service training be done?
2. What in-service training should take place?
3. What special staff courses and for whom?
4. How should teachers be developed professionally?
5. When should teachers visit other schools?
6. When should staff meetings be held on what subjects?
7. What committees should be appointed?
8. What supervision of teachers policy should be followed?

County budget (superintendents)
    School (Principal) - submitted for information.
Request to superintendents (form)
(occasionally request from officials for teacher to attend conference)

F. Evaluation

1. Evaluations left to Dept. Heads?
2. Evaluation of staff.

Evaluation - reports (what, when) - forms
Board guidelines (too extensive for secondaries)
Secondary School to recommend evaluation guidelines
Reports from prog. consultants (Form)

E—5

4. PARENTAL & EXTRA CURRICULAR
STUDENT CONTROL + EXTRA
CURRICULAR

1. Can time be taken off from class for extra curricular activities?
2. Number of school dances?
3. Principal - Student Council meeting.
4. Student smoking, where/when if any?   Board policy.
5. Student behaviour, problems.
6. Activities/projects of Student Council.   Selling campaigns - discussed with Director
7. What classes are each Vice-Principal responsible for, re discipline and attendance.
8. Classes for which principal is responsible for discipline/attendance.
9. Should attendance be compulsory for 16+?   Attendance violations to attend social social counsellor.
10. Should attendance be compulsory for 18+   See above.

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4. PARENTAL & ...RA CURRICULAR
   STUDENT CON... ... + EXTRA
   CURRICULAR

                11. Participation in school athletics, yes
                        or no in what sports.

                12. Student assemblies.

Parents Night   13. How many parents nights?   Parent-advisory committee - by Board.
                14. Use of facilities.   Board policy

                                              Requires school approval

                                              Requests from Board office, school
                                                 approval

                                              Permit to caretakers

Comment   15. Commencement arrangements

5. ONE SHOT DECISIONS

                1. Should students be allowed to take
                     employment before end of school?
                2. Library open at nights?
                3. What salary to request for principal?
                4. Use of facilities.
                5. Fire drills.
                6. Normal busing procedures.
                7. Change in procedure due to storms.

E-6

PART TWO

SECONDARY PRINCIPALS' DECISIONS

(STANDARDIZED) AND TIMING

CLASSIFICATION OF SECONDARY PRINCIPALS' DECISIONS

A.   MAIN CATEGORIES

1.   STUDENTS

1.1   Student progress/promotion/courses
1.2   Student Relations
1.3   Attendance
1.4   8-9 Transfer

2.   INSTRUCTIONAL PROGRAM

2.1   Curriculum
2.2   Budget
2.3   Exams/Pro ,tions
2.4   Non-regular events, library

3.   STAFF

3.1   Hire/Terminate/Promote (Regular)
3.2   Hire/Terminate/Promote (Non-professional)
3.3   Professional Development
3.4   Allocation of Staff
3.5   Staff Relations

4.   COMMUNITY RELATIONS

4.1   Relations with Parents
4.2   Use of Facilities

5.   PLANT

5.1   Plant

6.   TRANSPORTATION

6.1   Transportation

B.   SUB-CATEGORIES

1.   STUDENTS

1.1 Student Progress/Promotion/Courses

D1,1,1 - Exams, Timetable

D1,1,2 - Should students be allowed to take employment
           before end of school

D1,1,3 - Should students be given a credit in lower level
           if unsuccessful at upper

D1,1,4 - Should students be allowed to change/drop courses

D1,1,5 - Promotion decisions

1.2 Student Relations

D1,2,1 - Commencement arrangements (A)

D1,2,2 - Method of handling textbooks (distribution)

D1,2,3 - Student handbook

D1,2,4 - Commencement - when (Mc)

D1,2,5 - Commencement - format (Mc)

D1,2,6 - What home room system

D1,2,7 - Number of school dances

D1,2,8 - Method of handling textbooks (collection)

D1,2,9 - Procedures for school visitors

D1,2,10 - Principal - Student Council meeting

D1,2,11 - Student smoking, where/when if any

D1,2,12 - Method of locker distribution

D1,2,13 - Student behaviour, problems

D1,2,14 - Activities/Projects of Student Council

1.3 Attendance

D1,3,1 - Should attendance be compulsory for 16+

D1,3,2 - Should attendance be compulsory for 18+

D1,3,3 - Cancellation of classes due to teacher absence

D1,3,4 - Should free time for students be encouraged

1.4 8-9 Transfer

D1,4,1 - Planning 8-9 integration

2. INSTRUCTIONAL PROGRAM

2.1 Curriculum

D2,1,1 - Participation in school athletics, yes or no in what sports?

D2,1,2 - Projects for County done in school shops

D2,1,3 - List on option sheets - what is its format

D2,1,4 - Pupil course requirements

D2,1,5 - What courses to offer, includes study of econ. fees?

D2,1,7 - How many sections per course, includes study of / econ. fees?

D2,1,8 - What rooms to each course?(note special requirements)

D2,1,9 - Assign subjects to areas of study

D2,1,10 - How much autonomy to give department heads?

D2,1,11 - How long should periods be?

D2,1,12 - Use bells in schools?

D2,1,13 - Changes in curriculum, modify outlines

D2,1,14 - Should summer school be encouraged?

D2,1,15 - Student assemblies

D2,1,16 - Field trips

D2,1,17 - Approval of courses, get from Ministry

D2,1,18 - Approval of textbooks, get from Ministry

2.2   Budget

D2,2,1 - Budget requirements to be submitted

D2,2,2 - Best ratio of capital to supplies

D2,2,3 - Where should how much computer assistance be purchased?

D2,2,4 - What recommendation to Sen. Admin. for renting/buying capital equipment?

D2,2,5 - Allocation of budget (to departments)

D2,2,6 ·· How much autonomy do department heads have in spending money?

D2,2,7 - Review of budget spending

2.3   Exams/Promotions

D2,3,1 - Evaluations left to department heads?

D2,3,2 - Should all students write finals, who should write?

D2,3,3 - pass final - gets credit?

D2,3,4 - Have promotion meetings?

D2,3,5 - What promotion policy?

D2,3,6 - Should there be exams?

D2,3,7 - How often should there be exams?

D2,3,8 - Scheduling of exams?

2.4   Non-Regular Events/Library

D2,4,1 - Library open at nights?

D2,4,2 - How much autonomy to librarian?

D2,4,3 - Can time be taken off from class for extra curricular activities?

3.   STAFF

3.1   Hire/Terminate/Promote (Regular)

D3,1,1 - Student projections

D3,1,2 - Evaluation of staff

D3,1,3 - How much say should department heads have in
           teacher selection?

D3,1,4 - How many teachers can be hired given teacher/pupil
           ratio?

D3,1,5 - What salary to request for principal?

D3,1,6 - Who should be fired?

D3,1,7 - Who should be given a permanent contract?

D3,1,8 - Hiring procedure

3.2   Hire/Terminate/Promote (Non-Professional)

D3,2,1 - Ratio of teachers to paraprofessionals

D3,2,2 - How many secretaries (based on board guidelines)?

D3,2,3 - Salaries of non-professional people

3.3   Professional Development

D3,3,1 - When should inservice training be done?

D3,3,2 - What inservice training should take place?

D3,3,3 - What special staff courses and for whom?

D3,3,4 - How should teachers be developed professionally?

D3,3,5 - When should teachers visit other schools?

3.4   Allocation of Staff

D3,4,1 - Who should build timetables?

D3,4,2 - Class load per teacher

D3,4,3 - Class load for department heads

D3,4,4 - Class load for programme supervisors

D3,4,5 - Class load for Vice-Principals

D3,4,6 - Class load for Chairman

D3,4,7 - Class load for assistant department heads

D3,4,8 - Class load for Principal

D3,4.9 - How much autonomy for Librarian?

D3,4,10 - Duties of paraprofessionals

D3,4,11 - What classes are each V.P. responsible for, re discipline
           and attendance?

D3,4,12 - Classes for which principal is responsible for
           discipline/attendance

D3,4,13 - Autonomy of department head re assigning classes to
           teachers

D3,4,14 - Autonomy of department head in curriculum

D3,4,15 - Autonomy of department head re field trips

D3,4,16 - Authorize who can use P.A.

D3,4,17 - How much authority delegated to head secretary.

3.5   Staff Relations

D3,5,1 - What supervision of teachers policy should be followed?

D3,5,2 - School open 12 months or not?

D3,5,3 - Who should have keys to the school and what areas of
           the school?

D3,5,4 - When should staff meetings be held on what subjects?

D3,5,5 - What committees should be appointed?

D3,5,6 - Should staff be aware of budget, planning, board policies, etc.?

4.   COMMUNITY RELATIONS

4.1   Relations with Parents

D4,1,1 - How many parents nights?

D4,1,2 - Method of reporting to parents

D4,1,3 - Existence of a dress code for teachers

4.2   Use of Facilities

D4,2,1 - Use of Facilities

5.   PLANT

5.1   Plant

D5,1,1 - Maintenance of facilities

D5,1,2 - Authorization of when facilities (e.g., P.A.) can be used

D5,1,3 - Fire drills

6.   TRANSPORTATION

6.1   Transportation

D6,1,1 - Normal busing procedures

D6,1,2 - Change in procedure due to storms

C. TIMING OF SECONDARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student, Progress/Promotion/Courses

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1				X			X		X			
D1,1,2								X				
D1,1,3										X		
D1,1,4										X		
D1,1,5										X		

1.2 Student Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,1	X											
D1,2,2	X											
D1,2,3								X				
D1,2,4								X				
D1,2,5								X				
D1,2,6								X	X			
D1,2,7									X			
D1,2,8										X		
D1,2,9										X		
D1,2,10										X		
D1,2,11										X		
D1,2,12										X		
D1,2,13	X	X	X	X	X	X	X	X	X	X	ANA	ANA
D1,2,14	X	X	X	X	X	X	X	X	X	X	ANA	ANA

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1.3 Attendance

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,3,1										X		
D1,3,2										X		
D1,3,3										X		
D1,3,4	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont		

1.4 8-9 Transfer

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,4,1	X								X	X	X	X

2.   INSTRUCTIONAL PROGRAM

2.1   Instructional Programme, Curriculum

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X							X				
D2,1,2	X											
D2,1,3		X	X									
D2,1,4					X							
D2,1,5					X							
D2,1,6						X						
D2,1,7						X						
D2,1,8							X					
D2,1,9								X				
D2,1,10								X				
D2,1,11								X				
D2,1,12								X				
D2,1,13										X		
D2,1,14										X		
D2,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA			
D2,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,17	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,18	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2.2 Budget

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1		X	X									
D2,2,2		X	X									
D2,2,3		X	X									
D2,2,4		X	X									
D2,2,5				X	X	X	X	X	X	X		
D2,2,6									X	X		
D2,2,7	X	X	X	X	X	X	X	X	X	X	X	X

2.3 Exams/Promotions

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,3,1	X											
D2,3,2		X	X									
D2,3,3		X	X									
D2,3,4								X	X			
D2,3,5								X	X			
D2,3,6										X		
D2,3,7										ANA		
D2,3,8										ANA		

2.4   Non-Regular Events, Library

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,4,1	X											
D2,4,2								X	X			
D2,4,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.   STAFF

3.1   Hire/Terminate/Promote (Regular)

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1										X		
D3,1,2							X					
D3,1,3							X					
D3,1,4							X					
D3,1,5							X					
D3,1,6								X				
D3,1,7								X				
D3,1,8									X	X	X	

3.2   Hire/Terminate/Promote (Non-professional)

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1						X						
D3,2,2										X		
D3,2,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.3 Professional Development

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,3,1										X		
D3,3,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.4 Allocation of Staff

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,4,1		X	X									
D3,4,2						X						
D3,4,3						X						
D3,4,4						X						
D3,4,5						X						
D3,4,6						X						
D3,4,7						X						
D3,4,8						X						
D3,4,9								X				
D3,4,10								X				
D3,4,11										X		
D3,4,12										X		
D3,4,13										X		
D3,4,14										X		
D3,4,15										X		
D3,4,16										X		
D3,4,17										X		

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3.5   Staff Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,5,1										X		
D3,5,2										X		
D3,5,3										X		
D3,5,4	X	X	X	X	X	X	X	X	X	X		
D3,5,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,5,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

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4. COMMUNITY RELATIONS

4.1 Relations with Parents

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1	X											
D4,1,2									X	X		
D4,1,3										X		

4.2 Facility Use

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5. PLANT

5.1 Plant

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1						X						
D5,1,2										X		
D5,1,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

6. TRANSPORTATION

6.1 Transportation

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D6,1,1	X											
D6,1,2				X	X	X	X					

FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND

MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume III: Technical Appendices - Central Board Level

Susan Padro

March, 1977

Department of Educational Planning

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

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APPENDIX F

LIST OF BOARD FUNCTIONS

THE OPERATION OF THE BOARD BY FUNCTION

1. **FUNCTION: ORGANIZATIONAL PLANNING**

   Supervisor: Director of Education.
   Responsible to: Executive Committee of the Board.

   RESPONSIBILITIES:

   1. Developing a Planning Model for School Board Responsibilities.

   2. Develop a Model of Educational Planning.

2. **FUNCTION: ORGANIZATION - EXECUTIVE LEVEL**

   Supervisor: Director of Education.
   Responsible to: Executive Committee of the Board.

   RESPONSIBILITIES:

   1. Structures and Procedures of the Board.

   2. Structure of the Administration.

   3. Defining the Organization.

   4. Committee Organization.

3. **FUNCTION: SCHOOL BOARD - ADMINISTRATIVE RELATIONSHIPS**

   Supervisor: Director of Education.
   Responsible to: Executive Committee of the Board.

   RESPONSIBILITIES:

   1. Interaction among the School Board, the School System and the Community.

   2. Functions of the School Board and the School System.

   3. Board-Administration Relationships.

   4. Evaluation.

4. FUNCTION: PERSONNEL

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. Determine the System's Personnel Needs.

2. Recruitment, Selection and Promotion.

3. Supervisory Practices.

4. Maintaining and Improving Abilities of Personnel.

5. Evaluating Personnel.

5. FUNCTION: EXTERNAL RELATIONS

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. To develop a systematic approach to external relations so that the
   positive influences from both inside and outside the system can be
   utilized in the development of purposes and objectives of the school
   programs.

2. To convey decisions of the Board and the staff in an effective manner to
   concerned groups and organizations in the community.

3. To attempt to obtain positive community support in all areas necessary
   for a successful school program from such interest groups as: parents,
   ratepayers, religious organizations, labour groups, Ministry of Education
   Officials, local municipal officials, universities, teacher organizations,
   trustee organizations, business and industrial organizations, student
   organizations.

4. To be aware of the nature of external influences and the mechanisms
   for controlling them to the benefit of the school programs.

5. To make Board Members, Officials, and all staff aware of their responsi-
   bilities in this area.

6. FUNCTION: PLANT PLANNING DEVELOPMENT

    Supervisor: Executive Assistant to the Director.
    Responsible to: Director of Education.

    RESPONSIBILITIES:

    1. An ongoing analysis of the projected needs of the educational community
        for new buildings and facilities.

    2. Consideration of community needs and co-operating, where practical,
        with the community on the inclusion of these needs.

    3. Consideration of transportation needs and pupil walking distances.

    4. Planning Plant Development Projects.

    5. Plant Design, Construction and Alterations.

    6. Educational Program Requirements.

    7. Recommendation for Architect Selection, Plans and Specifications.

    8. Site Acquisition.

    9. Tendering.

    10. Project Supervision and Control.

7. FUNCTION: PLANT MANAGEMENT

    Supervisor: Executive Assistant to the Director.
    Responsible to: Director of Education.

    RESPONSIBILITIES:

    1. Establishment of Objectives and Policies for Plant Management.

    2. Custodial Services.

    3. Janitorial Services.

    4. Maintenance Services.

8. FUNCTION: LIAISON

    Supervisor: Executive Assistant to the Director.
    Responsible to: Director of Education.

    RESPONSIBILITIES:

    1. Municipalities.

    2. Bussing.

    3. Interjurisdictional Pupils.

9: FUNCTION: INSTRUCTIONAL MEDIA DEVELOPMENT

Supervisor: Executive Assistant to the Director.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Develop a library of films, filmstrips, tapes and professional books
   in consultation with the teaching staff of the Board.

2. Keep the staff informed of current trends in the audio-visual field.

3. Be available for consultation on matters referring to instructional
   media.

4. Maintain a system of distribution for instructional media.

10. FUNCTION: ORGANIZATION - SCHOOL LEVEL

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To organize the operation of the schools, K-13, Special Education Classes,
   and classes for the trainable retarded consistent with the philosophy
   of the aims and objectives of the Board and resolutions of the Board now
   in effect.

11. FUNCTION: SUPERVISION AND EVALUATION

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To provide for the supervision and evaluation of the
   teachers and principals of the County.

2. To provide for the supervision and evaluation of the curriculum and
   programs used in the schools of the County.

12. FUNCTION: EDUCATIONAL PLANNING

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To facilitate planning at all levels for developing educational programs,
   setting priorities, implementing and evaluating educational programs and
   using financial resources in the most rational manner.

2. To organize the system so that it will be sufficiently stable to allow
   for orderly and rational planning and decision making, and sufficiently
   stable to prevent strong barriers to growth and change.

13. FUNCTION: ACADEMIC BUDGET PROCESS

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Compilation of Academic Budget.

2. Control and Monitoring of Academic Budget.

14. FUNCTION: FINANCE

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Establish Objectives and Policies for Financial Management.

2. Long-Term Financing and Debt Management.

3. Accounting Systems.

4. Administrative Reporting.

5. Insurance Management.

6. Auditing.

7. Fixed Assets.

15. FUNCTION: TRANSPORTATION MANAGEMENT

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Objectives and Standards.

2. Route Planning.

3. Operations.

4. Bus Maintenance.

16. **FUNCTION: DATA PROCESSING**

   Supervisor: Controller of Finance.
   Responsible to: Director of Education.

   RESPONSIBILITIES:

   1. To make a continuing analysis of the Board's requirements.

   2. Review at regular intervals the existing systems for data processing and recording to determine their current effectiveness in meeting the Board's requirements.

   3. Improving Present Data Systems.

   4. Evaluation of Computer Feasibility.

17. **FUNCTION: PURCHASING AND STORES**

   Supervisor: Controller of Finance.
   Responsible to: Director of Education.

   RESPONSIBILITIES:

   1. Purchasing and Policy Standards.

   2. Initiating and Validating Purchase Requisitions.

   3. Supplier Selection.

   4. Securing Quotations.

   5. Issuing Orders.

   6. Expediting.

   7. Receiving and Verification for Payment.

   8. Stores Control and Administration.

   9. Purchasing and Stores Reports.

18. **FUNCTION: BUDGETING AND ACCOUNTING CONTROL OF BUDGET**

   Supervisor: Controller of Finance.
   Responsible to: Director of Education.

   RESPONSIBILITIES:

   1. Obtain Estimates of Revenue.

   2. Prepare Tentative Operating Budget for Approval.

   3. Review regularly all current or proposed projects on capital budgets.

   4. Report at regular intervals revenues and expenses.

APPENDIX G

INDIVIDUAL DECISION FUNCTIONS

NAME: W. Scott Roliff [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R01	Allocation of Director's time: a) Organization of time to various responsibilities - what can be delegated - to whom b) Priorities on personal time	Continual	All	(1) Organizational Planning
R02	Interpretation of - Board policy - needs and wants of personnel; how to handle	continual	All	(2) Organizational-Executive Level
R03	Budget preparation - regular needs - special needs and projects	yearly	Oct-Feb	(3) Administrative Relationships
	- how much total budget can mill rate stand politically	yearly	Oct	
	- how much total budget can ceiling stand	yearly	Oct	
R04	How should budget be distributed among schools	yearly	Feb	(3) Administrative Relationships
R05	Budget control			
	- day school regular	monthly	All	(3) Administrative Relationships
	- conferences, courses during year	monthly	All	
	- What summer courses for teachers should be subsidized by the Board?	yearly	Nov	

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NAME: W. Scott Roliff   [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R06	Teacher salary negotiations			(4) Personnel
R07	Striking County pupil/teacher ratio: - secondary - elementary - allotting number of teachers to i) two secondary schools ii) elementary schools	yearly	March	(3) Administrative Relation-ships
R08	Assessment of Secondary Principals	?	Jan and June	(4) Personnel
R10	Organizational changes:			(3) Administrative Relation-ships
	a) Review and changes of job descriptions to accommodate organizational changes	1	Jan	
	b) Review of administration organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency	1	Oct-Jan	
	c) Review of academic organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency	1	Oct-Jan	
R11	Staff morale and welfare problems	Continual	All	(4) Personnel

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NAME: W. Scott Roliff [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R13	Justification of spending	Continual	All	(5) External Relations
R14	Leaves of absence	as necessary	All	(4) Personnel
R15	Board Office accommodation	Once	August	(1) Organizational Planning
R16	Items to be referred to Board's solicitor	as necessary	All	(3) Administrative Relationships
R17	Information to federations, press and public	Monthly	All	(3) Administrative Relationships
R18	Deciding whether items should be referred to Board or handled by the Administration	as necessary	All	(3) Administrative Relationships
R19.1	Agenda items: Board/Executive			
	a) Officials meetings	10	All	(3) Administrative
	b) Administrative Council	10	All - summer recess	Relationships
	c) Executive Committee	10	All	
	d) Board	10	All	
	e) Principals' meetings	10	All - July recess	
	f) Board Committees	10	All - July recess	
R19.2	Agenda Items: Management Committee			
R20/S10	Assessment of Competency of experienced Teacher Applicants	20	Feb.-May	(10) Organization - School Level
R21/M04	Determination of items for inclusion in monthly financial reports to boards		Monthly	(14) Finance

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NAME: Murray R. Young   [M]

TITLE: Executive Assistant to the Director

Number	Decision	Frequency	Time of Year	Board Function
M01	Reporting - accommodation, maintenance	Monthly continual	All	(6) Plant Planning and Development
M02	Adult Education:	1	June	(8) Liason
	- selection of principals			
	- what guidelines are necessary			
	- what fees will be charged (with RB)			
	- what lengths of courses			
	- what supplies and facilities may be used			
M03	Summer School:			
	a) Should Summer School be	1	May	(8) Liason
	- operated locally			
	- purchased (secondary)			
	b) What fees, if any, should be charged (with RB)	1	May	
M04	Determination of recommendations regarding salary proposals for non-teaching staff (caretakers & office personnel)	annual	Oct-Dec	(7) Plant Management
M05	Staff requirements for special projects such as S.O.L.E.	6	May-June	(8) Liason
	- quantity			
	- quality			
	- salary			
	- condition of employment			
	i) responsibility			

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NAME: Murray R. Young   [M]

TITLE: Executive Assistant to the Director

Number	Decision	Frequency	Time of Year	Board Function
M06/B01	Answers to public regarding requests for changes in operation of the transportation system.	as necessary		(15) Transportation Management
M07/B03	Determination of recommendations regarding capital construction forecasts.	annual	September	(6) Plant planning and development
M08	Personnel's use of resources:			
	a) How should a continuing catalogue system for the materials be developed	1	August	(9) Instructional Media Development
	b) How should personnel be	continuing	All	
	- advised of available resources - encouraged to use resources - assisted in use of resources			
M09	Problems referred by Plant Supervisor, Special Education and other superintendents.	as necessary		(7) Plant Management
M10/S08	Necessary changes in attendance areas	once per year	March	(11) Supervision and Evaluation
M11/B05	Determination of information required at various stages regarding applications for building approvals	as necessary		(14) Finance
M12	Accommodation requirements for schools - building proposals	1	Jan-Feb	(6) Plant planning & Development

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NAME: Stanley Robinson   [S]

TITLE: Superintendent of Academic Affairs

Number	Decision	Frequency	Time of Year	Board Function
S01	Staffing of elementary schools	as necessary	April-Sept.	(10) Organization - School Level
S02	Evaluation of Teachers (Probationary)	as necessary	Sept-June	(11) Supervision and Evaluation
S03	Evaluation of Principals (Elementary)	Formerly once per year (on going)	April	(11) Supervision and Evaluation
S04	Curriculum Development	once to four times per year	Spring	(12) Educational Planning
S05	Teacher hiring	as necessary	Mainly spring	(10) Organization - School Level
S06	Promotions of elementary teachers	as necessary	Spring	(11) Supervision and Evaluatic
S07	Agenda items - Education Committee	ten times per year	Both meet Sept.	(11) " " "
	- Education Council (sub-committee of education committee)	five times per year	to June monthly	
S08/M10	Necessary changes in attendance areas	once per year	March	(11) Supervision and Evaluatic
S09	Resource material utilization/ involvement: a) What are the best ways of using resource materials by - oneself - other teachers - participants b) How can involvement in professional development programs be encouraged	Continuing	All	(9) Instructional media development
S10/R20	Competency of experienced teacher applicants following consultation with a superintendent of another board for recommendation	20	Feb-May	(10) Organization - School Level

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NAME: Stanley Robinson   [S]

TITLE: Superintendent of Academic Affairs

Number	Decision	Frequency	Time of Year	Board Function
S11	Planning of Professional Development Programs	2	August January	(11) Supervision and Evaluation
S12	Resources for Professional Development Programs	Continuing	All	(11) " " "
S13	How to keep teachers updated in current trends,.concepts and practices (information dissemination on P.D.)	Continuing	All	(11) " " "
S14	Performance Criteria for principals/ Vice-Principals			
	a) What is the performance criteria for appraising	1	March	
	- principals			
	- vice-principals			
	b) How do each of the above personnel meet the criteria	6	April	
S15	Program Modification	Ongoing	May/June	(12) Educational Planning
S16	Assessment of Academic Program	Ongoing	Dec. (Gr.8) May/June (Gr.3&6)	(12) Educational Planning
S17	Elementary School Budget	1	Oct. - Jan.	(13) Academic Budget Process
S18	Secondary School Budget	1	" "	(13) " " "
S19	Total Academic Budget	1	Jan. (to Board) Feb. (revised)	(13) " " "
S20/R04	Budget Distribution among Schools	yearly		(3) Admin. Relations

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NAME: F.R. Brand [B]

TITLE: Controller of Finance

Number	Decision	Frequency	Time of Year	Board Function
B01/M06	Answers to public regarding requests for changes in operation of the transportation system.	as necessary	-	(15) Transportation Management
B02/R21	Determination of items for inclusion in monthly financial reports to Board.	monthly		(14) Finance
B03/M07	Determination of recommendations regarding capital construction forecasts.	annual	September	(14) Finance
B04	Determination and review of suppliers and specifications for purchase of standard supplies and payments.	monthly	-	(17) Purchasing and Stores
B05/M11	Determination of information required at various stages regarding applications for building approvals.	as necessary	-	(14) Finance
B06	Answers to public to requests for information regarding school areas, bus routing, accident insurance claim problems, sale of school building, etc.	as necessary	-	(14) Finance
B07	Consideration of cost of operation of schools and resultant decisions concerning what should be done about problem indicated - monthly report inclusion if necessary.	monthly	April-December	(18) Budgeting and Budgetary Control
B08	Evaluation of non-teaching employees	annual	Sept-Dec	(14) Finance

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NAME: F.R. Brand [B]

TITLE: Controller of Finance

Number	Decision	Frequency	Time of Year	Board Function
B09	Determination of local levies for education.	annual	February	(18) Budgeting and Budgetary Control
B10	Determination of transportation arrangements with bus .operators - routing, loading, payment.	annual	October	(15) Transportation Management
B11	Budget Compilation	annual		(18) Budgeting and Budgetary Control

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APPENDIX H

AMALGAMATED DECISION FUNCTIONS

PART ONE: DECISIONS BY CLASSIFICATION SCHEME

PART TWO: DECISIONS BY BOARD FUNCTIONS

PART ONE

DECISIONS BY CLASSIFICATION SCHEME

CLASSIFICATION OF CENTRAL OFFICE DECISIONS

A.   MAIN CATEGORIES

1.   INSTRUCTIONAL PROGRAM

1.1   Budget
1.2   Academic Program

2.   STAFFING PROGRAM

2.1   Staff Relations
2.2   Hiring
2.3   Professional Development
2.4   Salary
2.5   Organization

3.   RELATIONS (Board/Community)

3.1   Board
3.2   Community

4.   TRANSPORTATION

4.1   Transportation

5.   PLANT

5.1   Problems Arising
5.2   Accommodation

B.   SUB-CATEGORIES

1.   INSTRUCTIONAL PROGRAM

1.1   Budget

Dl,1,1 - Budget Preparation (R03, S17, S18)

Dl,1,2 - Budget Distribution among schools (R04, S19, S20)

Dl,1,3 - Budget Control (R05, B07)

Dl,1,4 - Determination and review of suppliers and specifications
           for purchase of standard supplies (B04)

Dl,1,5 - Determination of local levies for education (B09)

1.2   Academic Program

Dl,2,2 - Curriculum Development (S04)

Dl,2,4 - Summer School (M03)

Dl,2,5 - Adult Education (M02)

Dl,2,6 - Assessment of Academic Program (S16)

Dl,2,7 - Program Modification (S15)

2.   STAFFING PROGRAM

2.1   Staff Relations

D2,1,2 - Evaluation of non-teaching employees (B08)

D2,1,3 - Evaluation of Teachers (Probationary) (S02)

D2,1,4 - Assessment of Secondary Principals (R08)

D2,1,5 - Evaluation of Elementary Principals (S03, S14)

D2,1,6 - Promotion of Elementary Teachers (S06)

D2,1,7 - Co-ordination and Supervision of Professional
           Development (S11.4)

D2,1,10 - Leaves of Absence (R14)

D2,1,11 - Allocation of Director's Time (R01)

2.2   Hiring

D2,2,1 - Teacher Hiring (S05)

D2,2,2 - Staffing of Special Projects (M05)

D2,2,3 - Staffing of Elementary Schools (S01)

D2,2,4 - Assessment of Competency of Experienced Teacher
Applicants (S10/R20)

2.3   Professional Development

D2,3,1 - Objectives for Professional Development Program (S11.2)

D2,3,4 - Planning of Professional Development Program (S11.1)

D2,3,5 - Resources for Professional Development Program (S12)

D2,3,6 - Personnel's Use of Resources (M08)

D2,3,7 - Information Dissemination on Professional Development
- Distribution of Information on P.D. to Teachers (S13.1)
- Information Distribution on Innovative Techniques
to Teachers (S13.2)

D2,3,9 - Resource Material Utilization/Involvement (S09)

Encourage Development of Resources (S09)

D2,3,10 - Distribution of Professional Development Overload (S11.5)

D2,3,11 - Encourage Innovation by Teachers (S13.3)

D2,3,12 - Evaluation System for Professional Development
Program (S11.3)

2.4   Salary

D2,4,1 - Salary Negotiations, Non-teaching Staff (M04)

D2,4,2 - Teachers Salary Negotiations (R06)

2.5   Organization

D2,5,1 - Organizational Changes (R10)

3.   RELATIONS (BOARD/COMMUNITY)

3.1   Board

D3,1,1 - Determination of Method of Budget Presentation (R03/B11)

D3,1,2 - Agenda Items/Board Reports
           (a) Board/Executive (R19.1)
           (b) Education Committee (S07)
           (c) Accommodation/Maintenance (M01)
           (d) Management Committee (R19.2)

D3,1,3 - Monthly Financial Reports to Board (B02, R21)

D3,1,4 - Interpretation of Board Policy - Staff Morale &
           Welfare Policies (R02,R11)

D3,1,5 - Items Referred to Board or Administration? (R18)

D3,1,6 - Items Referred to Board Solicitor (R16)

3.2   Community

D3,2,1 - Justification of Spending (R13)

D3,2,2 - Answers to Public ≥ School Areas, Bus Routes, etc. (B01,B06,M06)

D3,2,3 - Information to Federations, Press & Public (R17)

4.   TRANSPORTATION

4.1   Transportation

D4,1,1 - Determination of Transportation Arrangements with Bus
           Operators (Routing, Loading, Payment)   (B10)

5.   PLANT

5.1   Problems Arising

D5,1,1 - Problems Referred by Plant Supervisor, Special Education
           & Other Superintendents (M09)

5.2   Accommodation

D5,2,1 - Recommendation re Capital Construction Forecast (M07,B03)

D5,2,2 - Necessary Changes in Attendance Area (S08, M10)

D5,2,3 - Accommodation Requirements for Schools (Building Proposals)
           (M12)

D5,2,4 - Board Office Accommodation (R15)

D5,2,5 - Determination of Information Required at Various Stages
           Regarding Applicants for Building Approvals (B05, M11)

D5,2,6 - Striking County Pupil/Teacher Ratio (R07)

PART TWO

DECISIONS BY BOARD FUNCTIONS

BOARD FUNCTION		INDIVIDUAL DECISIONS	
(1)	Organizational Planning	R01	Allocation of Director's Time
		R15	Board Office Accommodation
(2)	Organization - Executive Level	R02	Interpretation of
			- Board policy
			- needs and wants of personnel, how to handle
(3)	Administrative Relationships	R03	Budget Preparation
		R04	How Should Budget be Distributed among Schools
		R07	Striking County Pupil/Teacher Ratio
		R10	Organizational Changes
		R16	Items to be Referred to Board's Solicitor
		R17	Information to Federations, Pre.., and Public
		R18	Deciding Whether Items Should be Referred to Board of Handled by the Administration
		R19	Agenda Items: Board/Executive
		R05	Budget Control
(4)	Personnel	R06	Teacher Salary Negotiations
		R08	Assessment of Secondary Principals
		R11	Staff Morale and Welfare Problems
		R14	Leaves of Absence
(5)	External Relations	R13	Justification of Spending
(6)	Plant Planning & Development	M01	Reporting - Accommodation - Maintenance
		M07/B03	Determination of Recommendations re Capital Construction Forecasts
		M12	Accommodation Requirements for Schools - Building Proposals
(7)	Plant Management	M04	Determination of Recommendations Regarding salary Proposals for Non-Teaching Staff (Caretakers & Office Personnel)
			Development of Maintenance Budget
			Monitoring, controling maintenance budget allocations
		M09	Problems Referred by Plant Supervisor, Special Ed. and other Superintendents

BOARD FUNCTION	INDIVIDUAL DECISIONS	
(8) Liaison	M02	Adult Education
	M03	Summer School
	M05	Staff requirements for Special projects such as S.O.L.E.
(9) Instructional Media & Development	M08	Personnel's Use of Resources
	S09	Resource Material Utilization/ Involvement
(10) Organization - School Level	R20/S10	Assessment of Competency of Experienced Teacher Applicants
	S01	Staffing of Elementary Schools
	S05	Teacher Hiring
(11) Supervision and Evaluation	S02	Evaluation of Teachers (Probationary)
	S03	Evaluation of Principals (Elementary)
	S06	Promotions of Elementary Teachers
	S07	Agenda Items - Education Committee
	S08/M10	Necessary Changes in Attendance Areas
	S11.1- S11.5	Planning of Professional Development Programs
	S12	Resources for Professional Development Programs
	S13.1- S13.3	How to Keep Teachers Updated on Current Trends, Concepts and Practices (P.D. Information Dissemination)
	S14	Performance Criteria for Principals/ Vice-Principals
(12) Educational Planning	S04	Curriculum Development
	S15=ITM9	Program Modification
	S16	Assessment of Academic Program
(13) Academic Budget Process	S17	Elementary School Budget
	S18	Secondary School Budget
	S19	Total Academic Budget
(14) Finance	B02/R21	Determination of Items for Inclusion in Monthly Financial Reports to Board
	B03/M07	Determination of Recommendations regarding Capital Construction Forecasts
	B05/M11	Determination of information required, Building Approvals
	B06	Answers to Public in answer to Requests, School Users, Bus Routing
	B08	Evaluation of Non-Teaching Employees

BOARD FUNCTION	INDIVIDUAL DECISIONS	
(15) Transportation Management	B01/M06	Answers to Public Regarding Requests for Changes in Operation of the Transportation System
	B10	Determination of Transportation Arrangements with Bus Operators- Routing, Loading, Payment
(16) Data Processing	---	
(17) Purchasing and Stores	B04	Determination and Review of Suppliers and specifications for Purchase of Standard Supplies and Payments
(18) Budgeting and Budgetary Control	B07	Consideration of Cost of Operation of Schools and Resultant Decisions Concerning What Should be Done, Monthly Report
	B09	Determination of Local Levies for Education
	B11	Budget Compilation

APPENDIX I

TIMING OF DECISIONS FUNCTIONS – BY CLASSIFICATION SCHEME

TIMING OF CENTRAL OFFICE DECISIONS

1. INSTRUCTIONAL PROGRAM

1.1 Budget

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1		X				X						
D1,1,2						X						
D1,1,3	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,4	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,5						X						

1.2 Academic Program

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,2						X	X	X	X	X	X	X
D1,2,4									X			
D1,2,5										X		
D1,2,6											X	

2. STAFFING PROGRAM

2.1 Staff Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X											X
D2,1,2	X	X	X	X								
D2,1,3	X	X	X	X	X	X	X	X	X	X		
D2,1,4										X		
D2,1,5								X				
D2,1,6								X				
D2,1,7	X	X	X	X	X	X	X	X	X	X	X	X
D2,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,1,11												

2.2 Hiring

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1	X							X	X	X	X	X
D2,2,2									X	X		
D2,2,3	X	ANA	ANA	ANA	ANA	ANA	ANA	X	X	X	X	X
D2,2,4						X	X					

2.3 Professional Development

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,3,1				X						X		
D2,3,3										X	X	
D2,3,4	X	X	X	X	X	X	X	X	X	X	X	X
D2,3,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2.3,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,12	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

2.4 Salary

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,4,1		X	X	X								
D2,4,2					X							

2.5 Organization

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,5,1		X	X	X	X	X	X	X	X	X		

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1						X						
D3,1,2	X	X	X	X	X	X	X	X	X	X	XX	X
D3,1,3	X	X	X	X	X	X	X	XX	X	X	X	X
D3,1,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,1,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

3.2 Community

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,2,3												

4. TRANSPORTATION

4.1 Transportation

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1		X										

5. PLANT

5.1 Problems Arising

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

5.2 Accommodation

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,2,1	X											
D5,2,2					X		X					
D5,2,3					X	X						
D5,2,4												X
D5,2,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D5,2,6												

iii)   Schools

i) Courses, Conferences, Occasional Teach., etc.

```
                Stop
                  ▲
                  │ No
              ◇
          Eligible      Yes        ┌──────────────┐
              A      ────────────→  │ Issue sep.   │
          ◇                         │ control sheet│
                                    │ & check out  │
                      ┌──────────┐  └──────────────┘
                      │ Criteria │
                      │(P.D.)policy│
                      │on occ.teach│
              ┌──────────┐
              │ Requests │
              │          │
```

ii)   Maintenance Items

```
          ┌──────────────┐
          │ Authorized   │
          │ expend.-item │
          │    area      │
          └──────────────┘
                  │
                  ✕          ┌──────────────┐
          ┌──────────────┐→  │Authorization │
          │ Desired      │   │     of       │
          │ expenditures │   │ expenditures │
          └──────────────┘   └──────────────┘
```

i) Secondary

```
┌──────────────┐      ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Dep'n of P/T │      │ Find out P/T │   │ P/T Ratio    │   │ Composition  │   │ Propositions │
│ ratio --     │─────▶│ R by schools │   │ across       │   │ - size of    │   │ of programs  │
│ trustees'    │      │              │   │ province     │   │ schools      │   │              │
│ council      │      └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
└──────────────┘
                      ┌──────────────┐                                          ┌──────────────┐
                      │ P/T Ratio    │                                          │ Special pro- │
                      │ by school    │                                          │ blems of sch.│
                      │              │                                          │ note special │
                      └──────────────┘                                          │ courses      │
                                      ┌──────────────┐                          └──────────────┘
                                      │ Reasons for  │
                                      │ dev. from    │
                                      │ Prov. norm   │
                                      └──────────────┘
                                      ┌──────────────┐   ┌──────────────┐
                                      │ Reasons for  │──▶│ Set new P/T  │
                                      │ deviations   │   │ Ratios by    │
                                      │              │   │ school       │
                                      └──────────────┘   └──────────────┘
  ┌──────────────┐   ┌──────────────┐                    ┌──────────────┐
  │ County       │◀──│ Set county   │◀───────────────────│ New P/T      │
  │ P/T R        │   │ P/T Ratio    │                    │ Ratios by    │
  │              │   │              │                    │ school       │
  └──────────────┘   └──────────────┘   ┌──────────────┐ └──────────────┘
  ┌──────────────┐   ┌──────────────┐   │ Extra        │
  │ Get Board    │──▶│ . Approved   │   │ personnel    │
  │ approval     │   │              │   │ required     │
  └──────────────┘   └──────────────┘   └──────────────┘
```

ii) Elementary

```
┌──────────────┐   ┌──────────────┐
│ P/T Ratio    │   │ Itinerant    │
│ across       │   │ teachers     │
│ Province     │   │ - spec. ed.  │
└──────────────┘   │   etc.       │
                   └──────────────┘
┌──────────────┐                      ┌──────────────┐   ┌──────────────┐
│ Projected    │                      │ P/T Ratio    │   │ Get county   │
│ enrollment   │                      │ for county   │──▶│ P/T Ratio    │
└──────────────┘                      │ next year    │   │ approved     │
                                      └──────────────┘   └──────────────┘
┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Size/Types of│   │ Determine    │   │ P/T Ratio    │
│ classes in   │──▶│ P/T R for    │   │ for each     │
│ each sch.    │   │ sch.&overall │   │ sch. next    │
│ next yr      │   └──────────────┘   │ year         │
└──────────────┘                      └──────────────┘
```

```
 ┌──────────────┐
 │ System       │
 │ Objectives   │        ┌──────────────┐      ┌──────────────┐      ┌──────────────┐
 ├──────────────┤        │ System obj.  │      │ Obje. of sys.│      │ Job          │
 │              │───────▶│ related to   │─────▶│ translated to│      │ description  │
 │ Desired      │        │ school       │      │ secondary    │      │ of principal │
 │ Changes in   │        └──────────────┘      │ school       │      └──────────────┘
 │ Objectives   │                              └──────────────┘
 └──────────────┘                                     │
                                                      ▼
                                              ┌──────────────┐
                                              │ Sys. Obj.    │
                                              │ related to   │
                              ┌──────────────┐│ principal    │
                              │ Principal    │└──────────────┘
                              │ Objectives   │───────┐
                              └──────────────┘       ▼
  ┌──────────────┐  ┌──────────────┐      ┌──────────────┐
  │ Method of    │◀─│ Determine    │◀─────│ Relationship │
  │ Evaluation   │  │ method of    │      │ of principal │
  └──────────────┘  │ evaluation   │◀──   │ to objective │
        │           └──────────────┘  │   └──────────────┘
        ▼                             │
  ┌──────────────┐  ┌──────────────┐  │   ┌──────────────┐
  │ Create       │  │ What other   │──┘   │ Knowledge    │
  │ Evaluation   │  │ boards do    │◀─────│ from course  │
  │ form         │  └──────────────┘      │ work, books  │
  └──────────────┘                        │    etc.      │
        │                                 └──────────────┘
        ▼
  ┌──────────────┐  ┌──────────────┐      ┌──────────────┐
  │ Evaluation   │  │ Create an    │      │ Evaluation   │
  │ form for     │─▶│ anecdotal    │─────▶│ form updated │
  │ that year    │  │ file & update│      │ monthly      │
  └──────────────┘  │ periodically │      └──────────────┘
                    │ eval. form   │             │
  ┌──────────────┐  └──────────────┘             ▼
  │ Anecdotal    │                        ┌──────────────┐
  │ File         │───────────────────────▶│ A final      │
  └──────────────┘                        │ evaluation   │
                    ┌──────────────┐      │ report       │
                    │ Principal's  │─────▶└──────────────┘
                    │ self-        │             │
                    │ evaluation   │             ▼
                    └──────────────┘
```

```
┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│ Relationship │  │ Obj. of sys. │  │ Common       │  │ Method of    │
│ of principal │  │ translated to│  │ evaluation   │  │ evaluation   │
│ to objective │  │ secondary    │  │ report       │  └──────────────┘
└──────────────┘  │ school       │  └──────────────┘
                  └──────────────┘
```

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```
  ┌─────────────┐                    ┌─────────────┐
  │ Perceived   │                    │ Org.        │
  │ problems    │                    │ Structure   │
  └──────┬──────┘                    └──────┬──────┘
         │                                  │
         ↓──────────────────────────────────↓
         ↓
  ┌─────────────┐
  │             │
  │  Analyze    │
  │  Structure  │
  │             │
  └──────┬──────┘
         │
         ↓
  ┌─────────────┐
  │ Deficiencies│
  │ in structure│
  └──────┬──────┘
         │
         ↓
  ┌─────────────┐
  │             │
  │ Take appro- │←───────────────────────
  │  priate     │
  │  action     │
  └──────┬──────┘
         │
         ↓
  ┌─────────────┐
  │ Revised     │
  │ Org.        │
  │ Structure   │
  └─────────────┘
```

```
                                    ┌──────────────┐
                                    │ Perceived    │
                                    │ Problem      │
                                    └──────────────┘
                                           │
                                           ▼
         ◇                          ┌──────────────┐                    ┌──────────────┐
        ╱ ╲           Personal      │ Take appro-  │                    │              │
       ╱   ╲ ────────────────────▶  │ priate       │ ─────────────────▶ │              │
      ◇ Scale?                      │ action       │                    │              │
       ╲   ╱                        └──────────────┘                    │              │
        ╲ ╱                                │                            │              │
         ◇                                 │                            │ New file on  │
         │                                 │                            │ problems,    │
         │          System-wide     ┌──────────────┐                   │ etc.         │
         │                          │ Previous Pro-│                    └──────────────┘
         │                          │ blems-causes │                           ▲
         │                          │ & personal-  │                           │
         │                          │ ities        │                           │
         │                          └──────────────┘                           │
         │                                 │                                    │
         │                                 ▼                                    │
 ┌──────────────┐                   ┌──────────────┐                           │
 │ Perceptions  │                   │              │                           │
 │ of others on │ ────────────────▶ │ Decision     │ ──────────────────────────┘
 │ problems     │                   │              │
 └──────────────┘                   └──────────────┘
```

D2,1,10/R14

LEAVES OF ABSENCE

Regulations of leaves

Request from teacher

covered by regulations

No → Refer to Admin. Council

Admin. Council Recommend-ation

Yes

Evaluation of teacher
- P's
- super

Recommend

No → Stop

Yes

Refer to Fed. Exec.

Fed. Exec. opinion

Prepare for B - put on agenda

Refer to appro. B Com. get opinion

Report on case

Recommendat-tion to Director

No

Recommend

No

ERIC
Full Text Provided by ERIC

New staff
(seemingly)
required

Study to see
if new staff
required

Staffing
report
-acc. implic.
-internal

Not
req.

Introduce new
methods/more
sophisticated
machines rec.

required

Check with
consultants

Not
Req.

New methods
and machines
recommended

Staffing
report
-external

Send reports
to Man.Com.
get recom-
mendation

Man. Com.
recommend-
ation

System
Goals

Re-examine
request and
alernatives

approve

Examine
modified
goals

Send recommen-
dation to
board for
decision

Re-examine
goals in
light of
restrict.staff

Feasible
system
goals

Get staff
and
accommodation

193

Evid. of
incident poss.
involv. Bd.
in litigation

→

Prepare case
history,
send to
solicitor

→

Case history
(all corres.
documents)

→

Give
Advice

→

Solicitor's
advice (in
writing)

↓

Examine
Advice

Neg.
Rec.

Pos.
Rec.

Recommend-
ation to
Board

→

Bd. passes/
rejects re-
commendation
not to follow
advice

↓

Another
solicitor
gives
advice

↓

New advice

↓

Action   Reject →   Take non-
advised
action

Accept
New Advice
↓

Bd. passes/
rejects re-
commendation
to follow ad.

Accept
↓

Reject

D3,1,: R18   ITEMS REFERR: :   R AD:INISTRATION

Problem

External in-
for::tion
:::::e/other
:::::s

Present to
interested
parties

:omments of
:xec. com.

Prese tation
to E: :.
C

R: :po:: ::
th: :a: :

C :::ts of
::::rations

:: ::ts of
— Ad: :.
Co: :::1

Co:
::::om::::
at:::

::: ::::i::
t:
F:: ::::::

P::
t: :::::
C:: :::

::::.
of E:::ec.
Com.

Policy

Create any
new policy

Take nec.
action

Board re:om::::
endations

BD3,1,2/R19.1   AGENDA ITEMS: BOARD EXECUTIVE

Item

Info. item or action

Present to admin. council

Admin. Council Recommendations

Prepare report on information item

Solicitor advice

Further study by officials

Present to Fed. Executive

Report on item

Fed. makes recommendations

Get Solicitor's advice

Return to officials for further study

Present to Board Exec.

Place on agenda/ distribute

Recommend appropriate action

Recommend on item

Where to send

Take appropriate action

Prepare rec. for board

Assign to approp. committee

Γ3,1,2/R19.2   ITEMS FOR MANAGEMENT COMMITTEE

D2,2,4/R20/S10   ASSESSMENT OF COMPETENCY OF EXPERIENCED TEACHER APPLICANTS

```
┌──────────────────┐   ┌──────────────────┐   ┌──────────────────┐
│                  │   │ Evaluation of    │   │                  │
│  Applications    │   │ other Bd.-       │   │  Dufferin        │
│                  │   │ by whom          │   │  criteria        │
│                  │   │  -criteria       │   │                  │
│                  │   │   used           │   │                  │
└─────┐     ┌──────┘   │  -assessment     │   └─────┐      ┌─────┘
      │     │          └──────┐    ┌──────┘         │      │
         │                       │                        │
         │                       │                        │
         ▼                       ▼                        ▼
```

```
              ┌──────────────────┐
              │                  │
              │   Assessment     │
              │                  │
              └──────────────────┘
                       │
                       ▼
              ┌──────────────────┐
              │ Assessment       │
              │    of            │
              │ Applicants       │
              └─────┐     ┌──────┘
```

D3,1,2/M01   REPO̲R̲T̲I̲N̲G̲: ACC̲O̲M̲P̲L̲I̲S̲H̲/MAINTENANCE

What was to
be done vs.
what accomp.

Rep̲o̲r̲t̲ on
wo̲r̲k̲s̲hops

Gene̲r̲a̲t̲e
repor̲t̲ ̲t̲o
teache̲r̲s

Workshop
Eval. P.D.
Prog. Eval.

```
┌─────────────┐
│ List of     │
│ interested  │
│ people      │
└──────┬──────┘
       ↓
┌─────────────┐
│ Choose prin.│
│  from inter-│
│ ested       │
│ people      │
└──────┬──────┘
       ↓
┌─────────────┐
│ Create      │
│ guidelines  │
│ for staffing│
└──────┬──────┘
       ↓
┌─────────────┐      ┌─────────────┐
│ Guidelines  │      │ C     for   │
│ for         │      │             │
│ staffing    │      │             │
└──────┬──────┘      └─────────────┘
```

Determine a desirable program

Interest people for staff

Interests of target population

A desirable program & its staffing

Cost by class and program

Determine fees and min class size

Min. class size by possible class size

Fees by possible class tentative

Fees, by possible class

Determine any subsidy for fees

Amount to come off top of budget

Publicize program

Hire staff/ create program

Final response to program

Staffing, Final program

D1,2,4 'M03   SUMMER SCHOOL

i) Secondary

```
                                                    ┌──────────────┐
                                                    │ Prog. fees   │
                                                    │ for candidate│
                                                    │ counties     │
                                                    └──────┬───────┘
                                                           │
                                                           ▼
        ┌──────────────┐                           ┌──────────────┐
        │ Prog. fees   │                           │ Which county │
        │ of selected  │───────────────────────────│ to get       │
        │ county       │                           │ service from │
        └──────┬───────┘                           └──────────────┘
               │
               │
┌─────────────┐│                                   ┌──────────────┐
│ Estimated   ││                                   │ Level of     │
│ demand for  │├──────────────────────────────────▶│ subsidy of   │
│ course      │                                    │ fees - if    │
└─────────────┘                                    │ any          │
                                                   └──────┬───────┘
        ┌──────────────┐                                  │
        │ Estimated    │                                  ▼
        │ Transportat- │                           ┌──────────────┐
        │ ion costs    │                           │ Fee schedule │
        └──────────────┘                           │ for program  │
                                                   └──────┬───────┘
                                                          │
                                                          ▼
                                           ┌──────────────┐        ┌──────────────┐
                                           │ What will    │        │ Demand for   │
                                           │ demand be -  │◀───────│ services     │
                                           │ publicize    │        └──────────────┘
                                           └──────┬───────┘
                                                  │
                                                  ▼
                                           ┌──────────────┐
                                           │ ·Bus         │
                                           │ Arrangements │
                                           └──────────────┘
```

D1,2,4/M03

ii) Elementary

```
┌──────────────┐        ┌──────────────┐
│ Need for     │────────│  ...tative   │
│ program      │        │  ...and for  │
│              │        │  ...gram     │
└──────┬───────┘        └──────────────┘
       │
       ▼
┌──────────────┐
│ Determine    │
│ where & what │
│ prog. will   │
│ be given     │
└──────┬───────┘
       │
```

┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Program &   │◄───────│ Where program│   │ Staffing   │
│ Costs   │   │ will be given│   │   │
└──────────────┘   └──────────────┘   └──────────────┘

┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Estimate of │   │ Determine   │   │ Interested   │   │ Hire   │
│ trans. costs │   │ Fees   │   │ Teachers   │   │ Staff   │
└──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘

┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Fees, by   │   │ Publicize   │   │ Staffing   │
│ offering   │   │ (students   │   │ required   │
│   │   │ & staff)   │   │   │
└──────────────┘   └──────────────┘   └──────────────┘

                        ┌──────────────┐   ┌──────────────┐
                        │ Demand for   │────────│ Bus   │
                        │ program   │   │ Arrangements │
                        └──────────────┘   └──────────────┘

                                                ┌──────────────┐
                                                │ Bus   │
                                                │ Arrangements │
                                                └──────────────┘

D2,4,1/M04   DETERMINATION OF RECOMMENDATIONS REGARDING SALARY PROPOSALS
              FOR NON-TEACHING STAFF (Caretakers and Office Personnel)

a) Caretakers

```
                    ┌──────────────┐                          ┌──────────────┐
                    │Provide con-  │                          │Caretakers    │
                    │sultant with  │                          │Wage          │
                    │caretakers    │                          │Schedule      │
                    │wages info.   │                          └──────────────┘
                    └──────┬───────┘                                  │
                           │                                          │
                           ▼                                          │
   ┌─────┐         ┌──────────────┐   ┌──────────────┐   ┌───────┐    │
   │Mgt. │ - - - - │Determine add-│   │Additional    │   │Consult│◄───┘
   │Cttee│         │ional info    │◄──│information    │◄──│-ant   │
   └─────┘         │required for  │   │required       │   └───────┘
                   │negotiations  │   └──────────────┘
                   └──────┬───────┘
                          │
                          ▼
                   ┌──────────────┐
                   │Assemble      │
                   │Required      │────────────────────────────────┐
                   │Information   │                                 │
                   └──────┬───────┘                                 │
                          │
                          ▼
                   ┌──────────────┐
                   │-Assist con-  │
                   │ sultant      │
                   │-advise cttee.│
                   │ of Proposed  │
                   │ Bd. Recommen-│
                   │ dations      │
                   │-attend negot-│
                   │ iation meeting│
                   └──────┬───────┘
                          │
   ┌──────────────┐       ▼
   │Negotiations  │  ┌──────────────┐
   │Progress      │──│Periodic      │
   │Report        │  │Reporting to  │
   └──────────────┘  │Committee     │
                     └──────┬───────┘
                            │
                            ▼
                     ┌──────────────┐
                     │Prepare docu- │
                     │ment implem-  │
                     │enting nego-  │
                     │tiation de-   │
                     │decisions     │
                     │-wages        │
                     │-fringe benefit│
                     └──────┬───────┘
                            │
                            ▼
                     ┌──────────────┐
                     │Implementation│
                     │Document      │
                     └──────┬───────┘
                            │
                            ▼
                          ┌───┐
                          │ 2 │
                          └───┘
```

D2,4,1/M04

```
              ┌─┐
              │2│
              └┬┘
               │
               ▼
    ┌──────────────────┐
    │Calculate         │
    │contract          │
    │caretaker         │
    │salary based      │
    │on agreement      │
    │with CUPE         │
    └────────┬─────────┘
             │
             ▼
    ┌──────────────────┐
    │Prepare           │
    │contracts         │
    │for signat-       │
    │  ories           │
    └────────┬─────────┘
             │
             ▼
    ┌──────────────────┐
    │                  │
    │   Contracts      │
    │                  │
    └────────┬─────────┘
             │
             ▼
    ┌──────────────────┐
    │cContract         │
    │Signing           │
    │                  │
    └────────┬─────────┘
             │
             ▼
    ┌──────────┐      ┌──────────┐      ╭─────────╮
    │Implement │      │New wage  │      │ Payroll │
    │terms of  │─────▶│schedule  │─────▶│ Dept.   │
    │contract  │      │          │      ╰─────────╯
    └──────────┘      └──────────┘
```

b) Clerical & Secretarial Staff

```
        ┌─────────────┐           ┌──────────────┐
        │·Purpose of  │           │Orientation   │
        │ Project     │           │-"people" or  │
        │             │           │"product"     │
        └──────┬──────┘           └──────┬───────┘
               │                         │
               ▼◄────────────────────────┘
               │
               │              ┌──────────────┐      ┌──────────────┐
               │              │Responsibility│      │Appointment   │
               ▼──────────────►determination ├──────►of person in  │
               │              │              │      │charge- if    │
               │              └──────┬───────┘      │applicable    │
               ▼                     │              └──────────────┘
        ┌─────────────┐              │
        │Assessment   │◄─────────────┘
        │of needs     │
        └───┬──────┬──┘
            │      │
     ┌──────┘      ▼
     ▼      ┌──────────────┐
┌─────────┐ │Requirements  │
│Structure│ │for staffing  │
│of project│ │-job require- │
│         │ │ments         │
└────┬────┘ └──────┬───────┘
     │             │
     ▼◄────────────┤
     │             ▼
     │      ┌──────────────┐      ┌──────────────┐
     │      │Budgetary     │      │Responsibility│
     ├──────►Responsibi-   ├──────►of            │
     │      │lity          │      │Budget        │
     │      └──────┬───────┘      └──────────────┘
     ▼             │
┌─────────┐        │
│         │◄───────┘
│ Hiring  │
│         │
└─────────┘
```

D3,2,2/M06/B01/B06   ANSWERS TO PUBLIC RE INQUIRIES RE SCHOOL AREAS,
BUS ROUTES, ETC.

Inquiry

Routine —Yes→ Give info & file inquiry

No

File Activity Inquiry

Determine Problem

Board Policy

Info from other sources supt. curr. instruction
- Director
- Plant

Obtain nec. information

Attendance Off. ME-Reg. off.-specific office

Telephone ← How to respond

Letter

207

SII.1

SII.1

Material

Material

August

Catalogue
material

continuous

Find new
material

Catalogue of
material

New
Material

Update catal-
ogue & inform
personnel

P.D. Bulletin
-new material
available

Updated
catalogue

D5,1,1/M09   PROBLEMS REFERRED BY PLANT SUPERVISORS, SPECIAL EDUCATION
                            AND OTHER SUPERINTENDENTS

```
                    ┌─────────────────┐
                    │  Problem        │
                    │  explanation    │
                    └─────────────────┘
                             │
                             ▼
                    ┌─────────────────┐
                    │  Determine      │
                    │  Problem        │
                    └─────────────────┘
                             │
                             ▼
                    ┌─────────────────┐
                    │  Problem        │
                    │  Specific       │
                    │  ation          │
                    └─────────────────┘
                             │
                             ▼
                        ◇ Referral ◇                    ┌──────────────┐
                      ◇ or implem-  ◇ ──────────────▶   │ Implement-   │
                        ◇ entation ◇                    │ ation        │
                             │                          └──────────────┘
                             ▼
                    ┌─────────────────┐
                    │                 │
                    │  Referral       │
                    │                 │
                    └─────────────────┘
```

D5,2,2/S08/M10   NECESSARY CHANGES IN ATTENDANCE AREAS

① 1

Tentative
Changes

Tentative
Changes

Meet
the 3 cri-
teria

Cost
Estimate

Needs of
Children

Political
Implication

Recommend to
Board

Presentation
to board
- needs, etc.

Decide

Take appro-
priate
action

Decision

ITM
1

Enrol. proj.
- 5 yr.
- by areas

Bldg. plans
- OMB
Expected
starting date
- staffing
- housing
depletion

Catholic pop.
trend press.
to support
sep. bd.

Live births
children
0-5

Dropout
factor

Present
Capacity in
both sys.

Find out
building
needs

Building
needs

Get board
approval

Special Ed.
needs - voc.
needs, etc.

Community
use of
schools

Available
firms

Educational
specifications
for new
building

Principal
appointed
for new
school

Appoint a
princ. if a
new school

Choose an
architect

Educational
Specifications

Create
plans

Building
plans
approved

Buy
Site

Build

Administra-
tion &
Service
Programs

Policy on
Requirements

Determine
skills, posi-
tions, etc.
for implement-
ation

Positions &
skills req.
for imple-
mentation

Skills, exper-
ience,interest
of all people
in system

Determine
Deficiencies

Unmet
Personnel
Needs

Skills,inter-
est,experience
required in
applicants

Determine
cost of
adequate
staffing

Experience
Qualification
Responsibility
Costs

Costs of
Staffing

Available
Funds

ITM 14

Return
to acti-
vity

No

Enough
Funds?

Yes

Advertise
Position

Go to
decision
S05

Assessment of present program needs

Review of present curr in print

New Curriculum Needs

M.E. Guidelines

Priorities of Needs

Establish curr. needs.

Terms of reference of for committee

Available Personnel

Greate Committees

Assignment of people to committees

TEACHER HIRING

S01

Staffing
Needs

Applications
Note of skills
exp. etc.

Positions
Advertised

Recommend
appointments
(by school)

Recommended
Appointments

No ──── Acceptance

Yes

Openings
Available

Skills re-
quirements
by level

Super. & Prin
annual reports
on teachers

Responses to
internal
advertising

Generate list
of internal
candidates

Yes | YES

Adequate
Internal

List of
Candidates

Pare down
list

NO
No

Search
outside

List of
outside
candidates

Short list
of internal
candidates

Pare down
list the
develop re-
commendation

Recommend-
ations

Board
Approval

218

```
                      ┌──────────────┐
                      │ Agenda       │
                      │ Previous     │
                      │ Years        │
                      └──────┬───────┘
                             │
                             ▼
                      ┌──────────────┐
                      │ Analyse      │
                      │ previous     │
                      │ agenda       │
                      └──────────────┘

  ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
  │ Topics not   │   │ Interim      │   │ Completed    │
  │ dealt with   │   │ report       │   │ topics       │
  │              │   │ given        │   │              │
  └──────────────┘   └──────────────┘   └──────────────┘

  ┌──────────────┐   ┌──────────────┐
  │ Requests for │   │ Create       │
  │ new topics   │──▶│ tentative    │
  │              │   │ agenda       │
  └──────────────┘   └──────────────┘

                     ┌──────────────┐
                     │ Tentative    │
                     │ agenda topics│
                     │ next year    │
                     └──────────────┘

                     ┌──────────────┐
                     │ Review by    │
                     │ Admin.       │         ┌──────────────┐
                     │ Council      │         │ Structure    │
                     └──────────────┘         │ of Mo.       │
                                              │ agenda       │
                     ┌──────────────┐         └──────────────┘
                     │ Structure    │
                     │ into mo.     │
                     │ agenda       │
                     └──────────────┘
```

```
Raw
Material
```

```
What
to do   →  To
           Workshop
```

```
Updated
materials
list
```

```
Effectiveness
of next strat
in getting
people to use
resources
```

```
Goals and
needs
```

```
Prepare for
workshops
```

```
Teachers'
opinions on
workshop,
goals,methods
```

```
Who will
take part
```

```
Which teachers
to involve in
planning,etc.
```

```
Personnel
Record
```

```
Courses
Available
```

```
Time people
can take
off
```

```
Decide on
course work
re fundabi-
lity and
eligibility
```

```
Courses which
will have
payment
```

```
Who can
take what
```

```
Tentative
demand for
courses
```

$11.2

Resource
material
available

Human & phys.
material
available

Curriculum
Objectives

Methods for
getting t's
to develop
resource
material

Help & In-
centives for
teachers

D2,3,1/S11.2   OBJECTIVES FOR PROFESSIONAL DEVELOPMENT
                                        PROGRAM

```
                        ┌─────────────┐
                        │ Old goals   │
                        │ by level    │
                        │ and program │
                        └─────────────┘
                              │
                              ▼
                        ┌─────────────┐
                        │             │
                        │ Generate    │
                        │ Goals       │
                        │             │
                        └─────────────┘
                              │
                              ▼
                        ┌─────────────┐
                        │ Goals by    │
                        │ level and   │
                        │ program     │
                        └─────────────┘
                              │
                              ▼
┌─────────────┐         ┌─────────────┐         ┌─────────────┐
│ Curriculum  │         │ Create      │         │ Weaknesses, │
│ -new concept├────────▶│ targets for │◀────────┤ strengths   │
│   etc.      │         │ P.D.        │         │ of staff    │
└─────────────┘         └─────────────┘         └─────────────┘
                              │
                              ▼
                        ┌─────────────┐
                        │ Targets     │
                        │ for P.D.    │
                        └─────────────┘
```

Individual Program

```
Sll.2 → Criteria/obj. for workshop
        Total Program
        → Evaluation machinery credited
        → Evaluation Machinery
          Target Population
          → Evaluation
            → Evaluation of participants
            → Evaluation on Personnel record
```

County Level

```
Who responsible for diffusion of materials methods

Who uses materials, methods

Objectives for material diffusion

→ What effects on classrooms
→ Desired class room effects (Beh.Obj.)

→ Evaluate Program
  Actual Classroom Effects

→ Evaluation of Material
→ Evaluation of Personnel
```

D2,1,7/S11.4   CO-ORDINATION & SUPERVISION OF PROFESSIONAL
                                    DEVELOPMENT

```
        ┌─────────────────┐
        │ Generate        │
        │ list of         │
        │ Weaknesses      │
        │                 │
        └────────┬────────┘
                 │
                 ▼
        ┌─────────────────┐
        │ List of         │
        │ problems &      │
        │ weaknesses      │
        └────────┬────────┘
                 │
                 ▼
        ┌─────────────────┐
        │ Set up a        │
        │ Workshop        │
        │                 │
        │                 │
        └─────────────────┘
```

D2,3,10/S11.5   DISTRIBUTION OF PROFESSIONAL DEVELOPMENT
                                     WORKLOAD

D2,3,5/S12   RESOURCES FOR PROFESSIONAL DEVELOPMENT PROGRAMS

D2,3,7/S13.1   DISTRIBUTION OF INFORMATION ON PROFESSIONAL
                         DEVELOPMENT   TO   TEACHERS

```
        (S11.2)                                          (S15)
           │                                                │
           ▼                                                ▼
  ┌─────────────┐      ┌──────────────────┐       ┌──────────────┐
  │ Strengths,  │      │ Present          │       │ Structure of │
  │ weaknesses  │      │ methods          │       │ New program  │
  │ of staff    │      │ -P.D.Bulletin    │       │ (desirable)  │
  └─────────────┘      │ -supervision     │       └──────────────┘
           │           │ -conference      │               │
           │           │ -intervisit-     │               │
           │           │    ation         │               │
           │           │ -Have them       │               │
           │           │  review films    │               │
           │           │  books, etc      │               │
           │           └──────────────────┘               │
           │                    │                          │
           │                    ▼                          │
           │           ┌──────────────────┐                │
           └──────────►│ Modify info.     │◄───────────────┘
                       │  delivery        │
                       │  system          │
                       └──────────────────┘
                                │
                                ▼
                       ┌──────────────────┐
                       │ Modification     │
                       │ of info.         │
                       │ system           │
                       └──────────────────┘
```

D2,3,7/S13.2   INFORMATION DISTRIBUTION ON INNOVATIVE TECHNIQUES
                          TO TEACHERS

(M08)

Who knows
what
technique

New
Techniques

Decide who
needs what

List of
target
population

Ensure all
relevant per-
sonnel know
new techn.

Prepare
Program

Program mix
desirable

D2,3,11/S13.3   ENCOURAGE INNOVATION BY TEACHERS

```
                    ┌──────────────┐
                    │ New concepts │
                    │ techniques   │
                    └──────────────┘
                           │
                           ↓
                    ┌──────────────┐
                    │ Find appli-  │
                    │ cable new    │
                    │ concepts     │
                    └──────────────┘
                           │
          ┌────────────────┴────────────────┐
          ↓                                  ↓
   ┌──────────────┐                   ┌──────────────┐
   │ New concepts │                   │ Methods for  │
   │ & Techniques │                   │ possible     │
   │ applicable   │                   │ encouragement│
   └──────────────┘                   └──────────────┘
          │                                  │
          ↓                                  ↓
          └────────────────┬────────────────┘
                           ↓
                    ┌──────────────┐
                    │ Set up for   │
                    │ innovation   │
                    │              │
                    └──────────────┘
                           │
                           ↓
                    ┌──────────────┐
                    │ Set up goals │
                    │ evaluation   │
                    │ procedures,  │
                    │    etc.      │
                    └──────────────┘
```

D2,1,5/S14   PERFORMANCE CRITERIA FOR PRINCIPALS/VICE-PRINCIPALS

Last year's criteria

Criticisms by Princ. & V.P.s

What should be modified

Criteria to be modified

Standards in industry

Set up new standards

New set of criteria

Evaluation Process

Evaluation against criteria

D1,2,7/SI5   PROGRAM MODIFICATION

(SII.2)

```
┌─────────────┐   ┌─────────────┐   ┌─────────────┐   ┌─────────────┐
│ Last year's │   │ Goals of P.D│   │ P.D. program│   │ Feedback    │
│ P.D.        │   │ targets of  │   │ in other    │   │ from        │
│ Program     │   │ P.D.        │   │ counties    │   │ principals  │
└─────────────┘   └─────────────┘   └─────────────┘   └─────────────┘
```

```
┌─────────────┐            ┌─────────────┐
│ Changes in  │            │ Develop     │
│ curriculum  │            │ Modifications│
└─────────────┘            └─────────────┘
```

```
                           ┌─────────────┐
                           │ Suggested   │
                           │ modifications│
                           └─────────────┘
```

```
                           ┌─────────────┐
                           │ Develop new │
                           │ program     │
                           └─────────────┘
```

```
                           ┌─────────────┐
                           │ Structure   │
                           │ of new      │
                           │ program     │
                           │ (desirable) │
                           └─────────────┘
```

ASSESSMENT OF ACADEMIC PROGRAM

```
              ( S E
                DEPT. )
                  |
                  v
        +------------------+  New
        | Standardized     |  vs. old --------------------------------+
        | tests results    |                                          |
        | by class         |                                          |
        +------------------+                                          |
                  |                                                   |
                  v                                                   |
        +------------------+                                          |
        | Analysis to      |                                          |
        | develop          |                                          |
        | question         |                                          |
        +------------------+                                          |
                  |                                                   |
                  v                                                   |
        +------------------+                                          |
        | Questions on     |                                          |
        |   anomalies      |                                          |
        +------------------+                                          |
                  |                                                   |
                  v                                                   |
        +------------------+      +------------------+                |
        | In-depth         |----->| Tentative        |                |
        | analysis         |      | answers to       |                |
        |                  |      | questions        |                |
        +------------------+      +------------------+                |
                  |                        |                          |
                  |              ----------+--------------------------+
                  v                        v                          v
        +------------------+      +------------------+      +------------------+
        | Decide on        |----->| Decision on      |      | Prepare          |
        | appropriate      |      | appropriate      |      | report to        |
        | action           |      | action           |      | board            |
        +------------------+      +------------------+      +------------------+
                                                                     |
                                                         +-----------+-----------+
                                                         v                       v
                                            +------------------+      +------------------+
                                            | Comparison of    |      | Comp. of sys.    |
                                            | performance      |      | against norms    |
                                            | with previous    |      | -each grade      |
                                            | years            |      |  level           |
                                            +------------------+      +------------------+
```

D1,1,1/S17/S18   ACADEMIC BUDGET PROCESS

```
                                      ┌──────────────┐
┌──────────────┐                      │  Current     │
│              │                      │  Program     │
│    Budget    │─────────────────────▶│  Consider-   │
│              │                      │  ation       │
└──────────────┘                      └──────────────┘
       ▲                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │  Board       │
       │                              │  Objectives  │
       │                              │              │
       │                              └──────────────┘
       │                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │  Future      │
       │                              │  Program     │
       │                              │  Consideration│
       │                              └──────────────┘
       │                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │  Special     │
       │                              │  needs of    │
       │                              │  students    │
       │                              └──────────────┘
       │                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │  Special     │
       │                              │  Staff       │
       │                              │  Requirements│
       │                              └──────────────┘
       │                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │  Projected   │
       │                              │  Enrollment  │
       │                              └──────────────┘
       │                                     │
       │                                     ▼
       │                              ┌──────────────┐
       │                              │ Availability │
       │                              │ of Monies    │
       │            ┌─────────┘       └──────────────┘
  No   │           ╱                         │
       │     ╱╲   ╱                           ▼
       │    ╱  ╲ ╱                     ┌──────────────┐
      ╱ Directors╲◀────────────────── │ Review with  │
      ╲  Review  ╱                     │ Principals   │
       ╲        ╱◀──┐                  └──────────────┘
        ╲      ╱    │
         ╲    ╱   Yes
          ╲  ╱      │                  ┌──────────────┐
                    └───────────────── │   Schools    │
                                       │              │
                                       └──────────────┘
```

D1,1,2/S19 TOTAL ACADEMIC BUDGET

ADVERTISING EST. (S1) I.C. HIRING PROCESS BUT NOT SALARIES?

PROF DEVELOPMENT ESTIMATES (S11)

COST OF RESOURCES (S12)

- SUBSCRIPTION COSTS
- DISTR." COST ETC. (S13)

EST OF COST FOR PROG. MODIF.
- MATERIALS
- NEW STAFF
- RETRAINING STAFF (S15)

CURRICULUM DEV. T (S04)

ASSESSMENT OF (S16) ACADEMIC PROGRAM

SCHOOL BUDGET
- ELEM.
- SEC.
(S17/S18)

DETERMINE ACA. NEEDS & PREPARE PRELIMINARY ACA. BUD. COST

PRELIMINARY ACAD. BUDGET EST.

MONIES AVAILABLE (FINANCE DEPT)

REVIEW OF NEEDS & AVAILABLE RES. (ie. ESTABLISH BUDGET)

ACTUAL ACAD. BUD. PENDING BD. APPROVAL

DISCUSSION WITH PRINCIPALS WRT THEIR BUDGETS

TOTAL BUDGET PROCESS (R03)?

DIRECTOR INPUT

APPROPRIATE MODIFICATION

YES

MODIFICATION

NO

INDIVIDUAL SCHOOL BUDGETS

BD. APPROVAL PROCESS

DISTRIBUTE FINAL APPROV. BUDGET TO PRINCIPAL

ACTUAL APPROVED ACADEMIC BUDGET

YES/NO

NO

REVISIONS

1

D3,1,3/B02/R21   MONTHLY FINANCIAL REPORTS TO BOARD

```
                              ( )
                               |
                               v
  ┌──────────────┐         ┌──────────────┐
  │ Computer     │         │ Review       │
  │ Print-out    │- - - - >│ Monthly      │
  │ sheets       │         │ statement    │
  │              │         │ with account.│
  └──────────────┘         └──────────────┘
                               |
                               v
  ┌──────────────┐         ┌──────────────┐         ┌──────────────┐
  │ Revenue &    │- - ┐    │ Determine    │         │ Suggestions  │
  │ Expenditure  │    │    │ exceptional  │         │ from         │
  │ Items        │    │    │ items on     │< - - - - │ Accountant   │
  └──────────────┘    ├ - >│ which comment│         │              │
                      │    │ is indicated │         └──────────────┘
  ┌──────────────┐    │    └──────────────┘
  │ Balance      │    │         |
  │ Sheet Items  │- - ┘         v
  └──────────────┘         ┌──────────────┐
                           │ Compile      │
                           │ Report       │
                           │              │
                           └──────────────┘
                               |
                               v
  ┌────────┐               ┌──────────────┐               ┌────────┐
  │Director│< Review & - - >│ Monthly      │< - Review & - >│Account-│
  │        │   Comment      │ Financial    │    Comment     │ant     │
  └────────┘               │ Report to    │               └────────┘
                           │ Board        │
                           └──────────────┘
                               |
                               v
                           ┌──────────────┐
                           │ Include in   │
                           │ Board        │
                           │ Agenda       │
                           └──────────────┘
                               |
                               v
                           ┌──────────────┐
                           │Financial Report
                           │ Board        │
                           │ Agenda       │
                           └──────────────┘
```

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D1,1,4/B04   DETERMINATION AND REVIEW OF SUPPLIERS AND SPECIFICS FOR PURCHASE
OF STANDARD SUPPLIES

```
┌──────────────┐              ┌──────────────┐
│Last year's   │              │Advise re     │
│quotation     │              │quality       │
│request       │              │Suggested     │
│form          │              │add/delet of  │
└──────────────┘              │items         │
       │                      └──────────────┘
       ▼                             │
┌──────────────┐         ┌──────────────┐        ┌──────────────┐        ┌──────────────┐
│Review of     │────────▶│Prepare new   │───────▶│New quota-    │───────▶│Fill out      │
│previous      │         │form          │        │tion request  │        │form          │
│form          │         │              │        │form          │        │              │
└──────────────┘         └──────────────┘        └──────────────┘        └──────────────┘
                                                         │                       │
                                                         ▼                       ▼
                                                 ┌──────────────┐        ┌──────────────┐
                                                 │Give          │        │Filled out    │
                                                 │quotations    │        │Q.R. forms    │
                                                 │              │        │              │
                                                 └──────────────┘        └──────────────┘
                                                         │                       │
                                                         ▼                       ▼
                                                 ┌──────────────┐        ┌──────────────┐
                                                 │Quotations    │        │Collate       │
                                                 │              │        │school        │
                                                 │              │        │requests      │
                                                 └──────────────┘        └──────────────┘
                                                         │                       │
                                                         ▼                       ▼
                                                 ┌──────────────┐        ┌──────────────┐
                                                 │Decide on     │◀───────│Total         │
                                                 │suppliers &   │        │Orders        │
                                                 │order         │        │              │
                                                 └──────────────┘        └──────────────┘
                                                         │
                                                         ▼
                                                 ┌──────────────┐
                                                 │Orders        │
                                                 │Issued        │
                                                 │              │
                                                 └──────────────┘
```

D1,1,3/B07   CONSIDERATION OF COST OF OPERATION AND RESULTANT DECISIONS
RE REQUIRED ACTION

```
          ┌──────────────┐
          │ Print out    │
          │ for each     │
          │ school - by  │
          │ function     │
          └──────┬───────┘
                 │
                 ▼
          ┌──────────────┐         ┌──────────────┐
          │              │         │ Divergencies │
          │ Review &     │────────▶│ from budget  │
          │ Analysis     │         │ & causes     │
          │              │         │ (exp. items) │
          └──────┬───────┘         └──────────────┘
                 │
                 ▼
          ┌──────────────┐
          │              │
          │ Prepare      │
          │ Report       │
          │              │
          └──────┬───────┘
                 │
                 ▼
          ┌──────────────┐
          │ Report       │
          │ (suggested   │
          │ action) to   │
          │ Man.Com      │
          └──────┬───────┘
                 │
                 ▼
          ┌──────────────┐
          │              │
          │              │
          │ Decision     │
          │              │
          │              │
          └──────┬───────┘
                 │
                 ▼
          ┌──────────────┐         ┌──────────────┐
          │ Prepare re-  │         │ Man. Cttee.  │
          │ commendation │◀────────│ Decision     │
          │ for board    │         │              │
          └──────┬───────┘         └──────────────┘
                 │
                 ▼
          ┌──────────────┐
          │ Recommend-   │
          │ ation to     │
          │ Board        │
          └──────────────┘
```

```
                    ┌─────────────┐
                    │ Completed   │
                    │ Evaluation  │
                    │ Forms       │
                    └──────┬──────┘
                           │
                           ▼
                    ┌─────────────┐
                    │  Prepare    │
                    │  previous   │
                    │   forms     │
                    └──────┬──────┘
                           │
            ┌──────────────┴──────────────┐
            ▼                             ▼
     ┌─────────────┐              ┌─────────────┐
     │ Forms for   │              │ Forms for   │
     │ Sup. plant  │              │ Director's  │
     │             │              │ secretary   │
     └──────┬──────┘              └──────┬──────┘
            │                             │
            └──────────────┬──────────────┘
                           ▼
                    ┌─────────────┐
                    │             │
                    │  Evaluate   │
                    │             │
                    └──────┬──────┘
                           │
                           ▼
                    ┌─────────────┐
                    │ Completed   │
                    │ Evaluations │
                    └──────┬──────┘
                           │
                           ▼
                    ┌─────────────┐
                    │ File evalu- │
                    │ ations -    │
                    │ take needed │
                    │  action     │
                    └─────────────┘
```

D1,1,5/B09·   DETERMINATION OF LOCAL LEVIES FOR EDUCATION

Other boards
ME

| Grant Information | Assessment information -prior records | Budget Info. -from Dir. & Man.Com. | Assess Assessment Information |

| Bring pre-liminary budget up-to-date | Prepare Preliminary Budget |

Is it up-to-date β

No

Yes

Prelim.budget estimate of local levy

Prepare final budget → Final Budget

| Official Grant Regulations | Final Assessment Info. |

Determine Levies

Levies

D4,1,1/B10   DETERMINATION OF TRANSPORTATION ARRANGEMENTS WITH
BUS OPERATORS

D3,1,1/B11   DETERMINATION OF METHOD OF BUDGET PRESENTATION

ITM 1   ENROLMENT PROJECTIONS (Twice Yearly)

```
┌─────────────┐    ┌─────────────┐   ┌─────────────┐   ┌─────────────┐
│ Previous    │    │ Census - age│   │ Survey of   │   │ Formulae re │
│ Projections │    │   specific  │   │ present     │   │ housing vs. │
│ vs. actual  │    │             │   │ population  │   │ population  │
│ (comparison)│    │             │   │             │   │             │
└──────┬──────┘    └──────┬──────┘   └──────┬──────┘   └──────┬──────┘
       │                  │                 │                 │
       └──────────────────┴────────┬────────┴─────────────────┘
                                    │
┌─────────────┐          ┌──────────▼──────┐        ╱─────────╲
│ Present     │          │ Calculate       │       ╱   Let     ╲
│ student     │─────────▶│ enrollment      │◀─────▶  go and    │
│ enrolment   │          │ projections     │       ╲  pay fees ╱
└─────────────┘          └──────────┬──────┘        ╲─────────╱
                          ▲         │                           │
┌─────────────┐           │         │                    (BP)   │
│ Staging     │           │         │              ┌────────────▼┐
│ plans by    │───────────┘         │              │ Applications│
│ area(Munic. │                     │              │ for outside │
│ Affairs)    │                     │              └─────────────┘
└─────────────┘                     │
                          ┌─────────┴─────────┐
                          │                   │
                 ┌────────▼──────┐   ┌─────────▼──────┐
                 │ 5 year proj.  │   │ Expected no.   │
                 │ 3 year in Oct │   │ into & out     │
                 │ students by   │   │ of county      │
                 │ age and       │   └────────────────┘
                 │    area       │
                 └───────────────┘
```

ITM 2   REVENUE PROJECTIONS

```
       ┌─────┐
       │ ITM │
       │  1  │
       └─────┘
          │
          ▼
┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│ Projected    │  │ ME Guess at  │  │ Present      │  │ Board Policy │
│ Enrolments   │  │ Grant        │  │ grant        │  │ re payment of│
│ -total elem. │  │ Structures   │  │ Structure    │  │ fees into &  │
│ -total sec.  │  │              │  │              │  │ out of       │
└──────────────┘  └──────────────┘  └──────────────┘  │   county     │
       │                 │                 │           └──────────────┘
       │                 │                 │                 │
       ▼                 ▼                 ▼                 ▼
       └─────────────────┴────────┬────────┴─────────────────┘
                                  │
                                  ▼
                          ┌──────────────┐
                          │ Calculate    │
                          │ revenue      │
                          │ projections  │
                          └──────────────┘
                                  │
                                  ▼
                          ┌──────────────┐
                          │ 5 Yr. Proj.  │
                          │ Total Grants │
                          │ -tuition out │
                          │ +tuition in  │
                          └──────────────┘
```

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ITM 3   MAINTENANCE COST PROJECTIONS

```
                                        ┌───────┐
                                        │ ITM   │
                                        │  7    │
                                        └───┬───┘
                                            │
                                            ▼
┌──────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Standard │   │ Historical   │   │              │   │ Expected     │
│ Costs    │   │ Data on      │   │ Facilities   │   │ Maintenance  │
│          │   │ School Main- │   │ Projection   │   │ (Formulae)   │
│          │   │ tenance      │   │              │   │              │
└────┬─────┘   └──────┬───────┘   └──────┬───────┘   └──────┬───────┘
     │                │                  │                  │
     ▼                ▼                  │                  ▼
     └────────────────┴──────────┬───────┴──────────────────┘
                                 │
                                 ▼
                        ┌──────────────┐
                        │ Make mainten-│
                        │ ance cost    │
                        │ projections  │
                        └──────┬───────┘
                               │
                               ▼
                        ┌──────────────┐
                        │ 5 Yr. Proj.  │
                        │ Maintenance  │
                        │   costs      │
                        │ 1 year       │
                        │ activity     │
                        └──────────────┘
```

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ITM 4   DEBT CHARGE PROJECTIONS (ANA)

ITM 5   BUSING COST PROJECTIONS

(Bd. Approval)
end Sept./Oct.

```
┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│  Bus Routes  │   │   Size of    │   │  Costs per   │
│              │   │    Buses     │   │     Mile     │
└──────────────┘   └──────────────┘   └──────────────┘
```

```
┌──────────────┐
│  Calculate   │
│ current year │         Orangeville        ┌──ITM──┐
│ busing costs │         Other              │   1   │
└──────────────┘                            └───────┘
```

```
                                            ┌──────────────┐
                                            │  Enrolment   │
                                            │ Projections  │
                                            │   by area    │
                                            └──────────────┘
```

Sept.

```
┌──────────────┐   ┌──────────────┐
│  Total cost  │   │ Make 5-Year  │
│  by area     │   │  Projection  │
│  (Formula)   │   │  of Busing   │
│              │   │    Costs     │
└──────────────┘   └──────────────┘
```

```
                                            ┌──────────────┐
                                            │   Previous   │
                                            │  Costs, en-  │
                                            │  rolment by  │
                                            │     area     │
                                            └──────────────┘
```

Oct.

Bd. Approval
of Contracts
with Bus Co.
Sept./Oct.

```
┌──────────────┐
│ 5-Yr. Proj.  │
│ - Bus costs  │
└──────────────┘
```
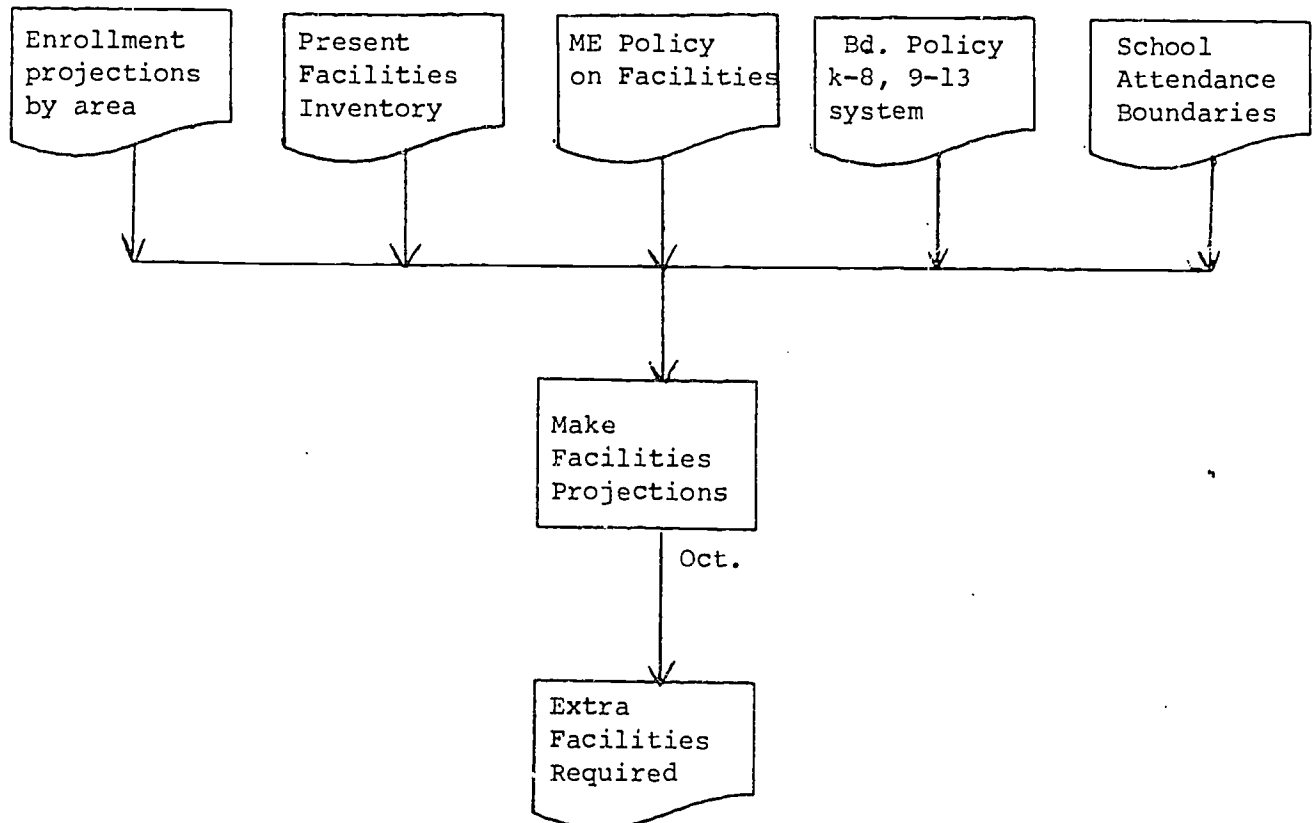
ITM 6   TEACHER PROJECTIONS

ITM 7   FACILITIES PROJECTIONS

```
┌─────────────┐  ┌─────────────┐  ┌─────────────┐  ┌─────────────┐  ┌─────────────┐
│Enrollment   │  │Present      │  │ME Policy    │  │Bd. Policy   │  │School       │
│projections  │  │Facilities   │  │on Facilities│  │k-8, 9-13    │  │Attendance   │
│by area      │  │Inventory    │  │             │  │system       │  │Boundaries   │
└──────┬──────┘  └──────┬──────┘  └──────┬──────┘  └──────┬──────┘  └──────┬──────┘
       │                │                │                │                │
       └────────────────┴────────────────┼────────────────┴────────────────┘
                                          ▼
                                 ┌─────────────┐
                                 │Make         │
                                 │Facilities   │
                                 │Projections  │
                                 └──────┬──────┘
                                        │  Oct.
                                        ▼
                                 ┌─────────────┐
                                 │Extra        │
                                 │Facilities   │
                                 │Required     │
                                 └─────────────┘
```
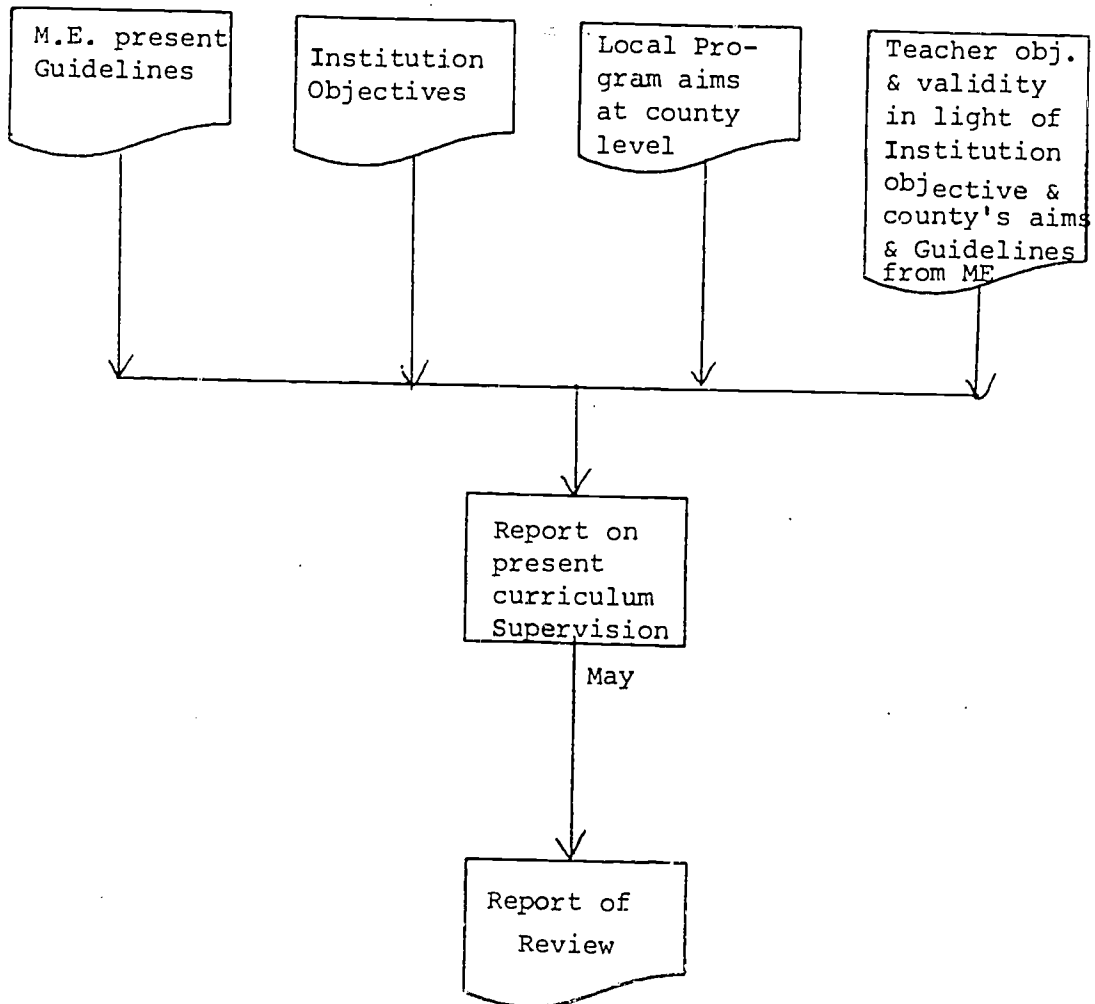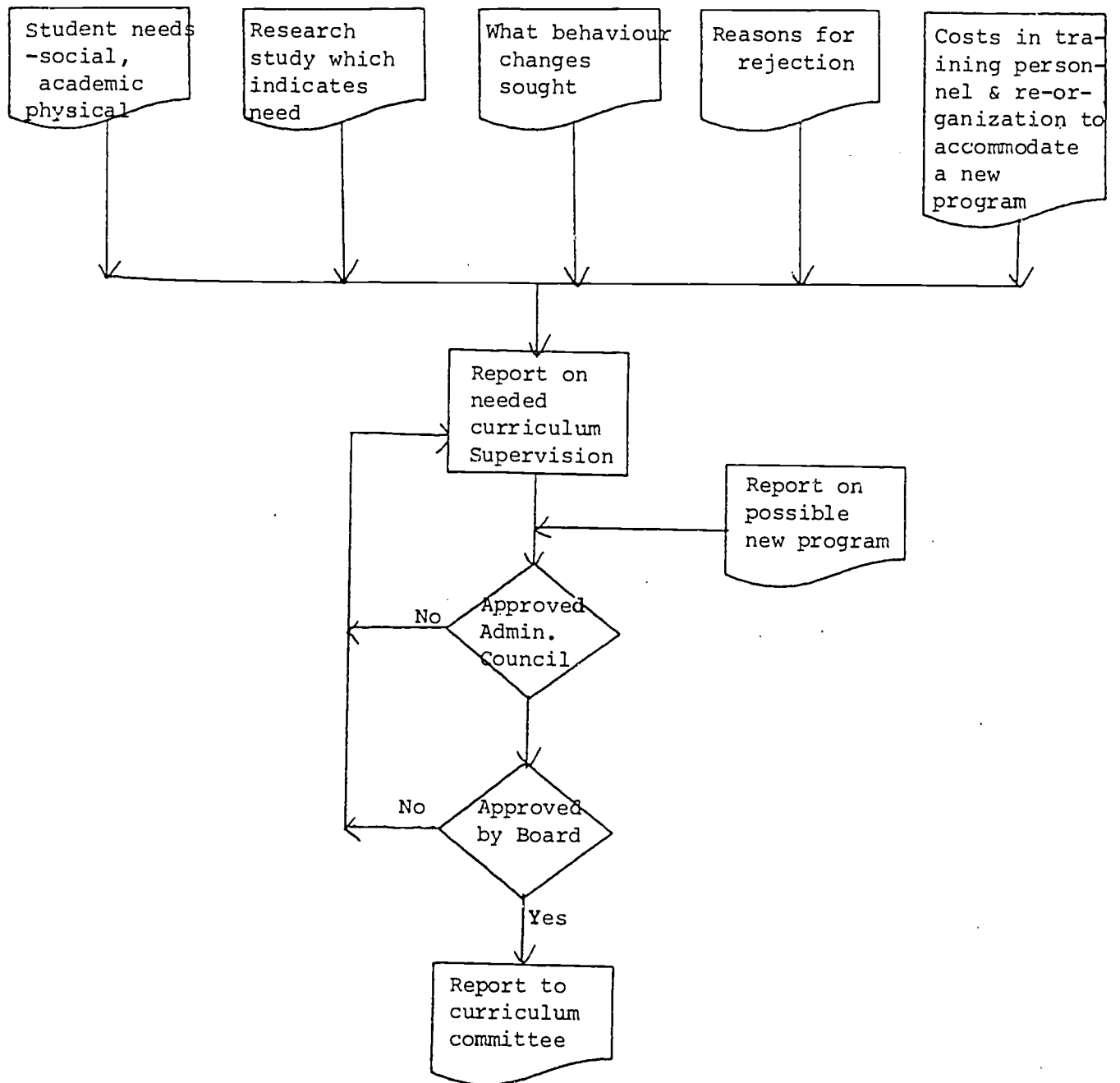
ITM 8   AMOUNT AVAILABLE FOR SCHOOLS

```
   (Itm)        (Itm)          (Itm)           (Itm)
    2            3              4               5
     |            |              |               |
     v            v              v               v
 ┌─────────┐ ┌──────────┐ ┌──────────────┐ ┌──────────────┐
 │ Revenue │ │          │ │ Debt. Charges│ │  Busing      │
 │Projections│ │Main Costs│ │ (estimate)   │ │ costs (est.) │
 └────┬────┘ └────┬─────┘ └──────┬───────┘ └──────┬───────┘
      │           │              │                │
      v           v              v                v
      └───────────┴──────────────┴────────────────┘
                       │
                       │                    (D
                       │                     6A)
                       │                      │
                       │                      v
 ┌─────────┐    ┌──────────────┐      ┌──────────────┐
 │         │    │  Calculate   │      │Salaries (est)│
 │ Ceilings│───>│budget avail  │<─────│              │
 │         │    │-able for     │      │ Mill Rate    │
 │         │    │  schools     │      │ Decisions    │
 └─────────┘    └──────┬───────┘      └──────────────┘
                       │
                       v
                ┌──────────────┐
                │ 95-5 split   │
                │ of amount    │
                │ avail. for   │
                │ schools      │
                └──────────────┘
```

ITM 9   ASSESSMENT OF PRESENT PROGRAM

Parents
1. Social
   Behaviour
2. Reports
3. Employabil-
   ity/Pract-
   ical Skills
4. Teachers
5. Preparation
   for next
   academic
   level

Home
Assessment
- Parent

Report on
home assess-
ment
(informal)

Principal
1. Social
   Behaviour
2. Academic-
   -standardized
   tests
   -teacher con-
   structed
   tests
3. Past achie-
   vement rec.
4. Parent
   comment
5. Supervisor's
   comment

School-wide
assessment
- principal

Report on
school
assessment
(formal)

Superintend-
ent's
Assessment

Teacher
1. Social
   Behaviour
2. Academic
   Behaviour
3. Verbal Re-
   ports -
   teachers,
   psychologist
4. Comments of
   Principal &
   Super.

Classroom
assessment

Report on
student
assessment
(Formal)

Students
1. Interests
2. Employabil-
   ity/Practi-
   cal Skills
3. Preparation
   for next
   level

Student
assessment

Report on
student
assessment
(Formal)

1. Achievement
2. tests (County
   wide)
2. Achievement
   Trends
3. Employabil-
   ity
4. Dropout
   rates
5. Interschool
   Comparisons
6. Community
   Impressions
7. Social
   Behaviour
(Community)

ITM 10   REVIEW   OF PRESENT CURRICULUM IN PRINT

```
┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│ M.E. present │  │ Institution  │  │ Local Pro-   │  │ Teacher obj. │
│ Guidelines   │  │ Objectives   │  │ gram aims    │  │ & validity   │
│              │  │              │  │ at county    │  │ in light of  │
│              │  │              │  │ level        │  │ Institution  │
└──────────────┘  └──────────────┘  └──────────────┘  │ objective &  │
                                                        │ county's aims│
                                                        │ & Guidelines │
                                                        │ from ME      │
                                                        └──────────────┘
```

```
        ┌──────────────┐
        │ Report on    │
        │ present      │
        │ curriculum   │
        │ Supervision  │
        └──────────────┘
               │ May
               ▼
        ┌──────────────┐
        │ Report of    │
        │   Review     │
        └──────────────┘
```

ITM 11   NEW CURRICULUM NEEDS

```
┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│Student needs │  │Research      │  │What behaviour│  │Reasons for   │  │Costs in tra- │
│ -social,     │  │study which   │  │ changes      │  │ rejection    │  │ining person- │
│ academic     │  │indicates     │  │ sought       │  │              │  │nel & re-or-  │
│ physical     │  │need          │  │              │  │              │  │ganization to │
└──────┬───────┘  └──────┬───────┘  └──────┬───────┘  └──────┬───────┘  │accommodate   │
       │                 │                 │                 │          │a new         │
       │                 │                 │                 │          │program       │
       │                 │                 │                 │          └──────┬───────┘
       ▼                 ▼                 ▼                 ▼                 ▼
```

```
                         ┌──────────────┐
                         │Report on     │
                         │needed        │
                         │curriculum    │              ┌──────────────┐
                         │Supervision   │              │Report on     │
                         └──────┬───────┘              │possible      │
                                │      ◄───────────────│new program   │
                                ▼                      └──────────────┘
                          ╱Approved╲
                   No    ╱ Admin.   ╲
                  ◄──────╲ Council  ╱
                          ╲        ╱
                                │
                                ▼
                          ╱Approved╲
                   No    ╱ by Board ╲
                  ◄──────╲          ╱
                          ╲        ╱
                                │Yes
                                ▼
                         ┌──────────────┐
                         │Report to     │
                         │curriculum    │
                         │committee     │
                         └──────────────┘
```

ITM 12   M.E. GUIDELINES

```
┌─────────────────┐   ┌─────────────────┐   ┌─────────────────┐
│ Compare with    │   │ Present pro-    │   │ Changes from    │
│ present         │   │ gram - flexi-   │   │ old guide-      │
│ program         │   │ bility          │   │ lines           │
└────────┬────────┘   └────────┬────────┘   └────────┬────────┘
         │                     │                     │
         └──────────┬──────────┴──────────┬──────────┘
                    │
          ┌─────────▼─────────┐
          │ Prepare re-       │
          │ port(for          │
          │ committee)on      │
          │ necessary         │
          │ changes/costs     │
          └─────────┬─────────┘
                    │
          ┌─────────▼─────────┐
          │ Changes re-       │
          │ quired and        │
          │  costs            │
          └───────────────────┘
```

ITM 13   PRIORITY OF NEEDS

Director/Supt.B&F

```
┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│Total cost    │   │Amount avail- │   │Total Cost    │   │ Political    │
│of possible   │   │able for      │   │of other      │   │considerations│
│curr. modif.  │   │curriculum    │   │Ed. Program   │   │-parental     │
│and new       │   │dev't.        │   │              │   │ demands      │
│project       │   └──────────────┘   └──────────────┘   │-student      │
└──────────────┘                                         │ demands      │
                                                         │-government   │
                                                         │ demands      │
                                                         └──────────────┘
```

```
        ┌──────────────┐
        │Create pri-   │
        │orities given │
        │constraints   │
        │Supervision   │
        └──────────────┘
```

```
        ┌──────────────┐
        │  Priorities  │
        └──────────────┘
```

ITM 14   DETERMINE MONEY AVAILABLE FOR ELEMENTARY SCHOOL STAFFING

```
┌─────────────┐   ┌─────────────┐   ┌─────────────┐   ┌─────────────┐
│Total elem-  │   │Present      │   │Possible     │   │Present      │
│entary inst- │   │Demands      │   │additional   │   │funds avail- │
│itution      │   │             │   │funds        │   │able         │
│budget       │   │             │   │             │   │             │
└─────────────┘   └─────────────┘   └─────────────┘   └─────────────┘
```

Generate
possibilit-
ies (S.R.)

Possible re-
distribution
of funds

Determine
likely avail-
able amount
(S.R. & Board)

Board
Approval

Money
Available

ITM 15

(1) Programs

(S03)

| Generate Program Data S.R. & Principal | → | Innovations
Learning
  outcomes
Suitability
Student ser-
  vices avail.
Outside res-
  ources used
Results-
  standardized
  tests
Extracurricu-
lar avail. | P E R F O R M A N C E |

(2) Teacher Development

(S03)

| Generate teacher dev- elopment data S.R. & Princ. | → | #Staff in
a) Profession.
  courses
b) Academic
  courses
c) Workshops
#Kind of
  study groups
Prof. jour.
& Library
added to
school
Staff invol-
vement in
county curr-
iculum deve-
lopment | P E R F O R M A N C E |

(3) Administration of School

(S03)

| Generate data on Admin. of school (S.R. & Prin. & other central office staff | → | Accuracy,
punctuality
of reports
Within Budget
Budget?
Budget based
on school
needs
Plant
maintenance
Accurate, up-
to-date
records | P E R F O R M A N C E |

257

ITM 15.

(4) Influence

(S03)

```
+------------+        +-------------------------+
|            |        | Involvement    |P       |
|            |        |   in:          |E       |
| Effect on  |------->| a)P.D.program  |R       |
| County     |        | b)curr.dev.    |F       |
| S.R.       |        |    program     |O       |
|            |        | c)Principal    |R       |
+------------+        |    association |M       |
                      | d) Admin.      |A       |
                      |    Council     |N       |
                      |                |C       |
                      |                |E       |
```

(5) Public Relations

(S03)

```
+------------+        +-------------------------+
|            |        | Parent's       |P       |
|            |        | advisory       |E       |
|            |        | council        |R       |
|            |        | Meeting with   |F       |
| Public     |        | the parents    |O       |
| Relations  |------->| Parent         |R       |
| S.R.&Princ.|        | counselling    |M       |
|            |        | Civic clubs    |A       |
+------------+        | Community use  |N       |
                      | of schools     |C       |
                      | Use of comm-   |E       |
                      | unity  re-     |        |
                      | sources        |        |
```

(6) School Organization

(S03)

```
+---------------+        +-------------------------+
|               |        | Use of school  |P       |
|               |        | personnel      |E       |
| Data generat- |        | Use of space   |R       |
| ion on school |        | Governing      |F       |
| organization  |------->| structure      |O       |
| S.R. & Princ. |        | -staff in-     |R       |
|               |        |  volvement in  |M       |
+---------------+        | a)Budgeting    |A       |
                         | b)Policy       |N       |
                         | c)Student      |C       |
                         |    council     |E       |
                         | d)Etc.         |        |
                         | Scheduling     |        |
```

APPENDIX K

INFORMATION NEEDS FOR DECISIONS -
BY BOARD FUNCTIONS

(1) ORGANIZATIONAL PLANNING

R01 Allocation of Director's Time

Documents

Objective of System	Estimated time for trustees
Time management of resources	Estimated time for trustees association
Time by major area	Estimated time for chairman etc.
Time management or personnel	Estimated time for "in-tray".
Department of Educational Meeting	Estimated time for board meetings
Teachers federation	Estimated time for public
OAEAO and other educational resources	Tentative time schedule
Municipal officials	
Prof. Development of opportunities for Director	
Priorities for conflicting activities	
Personnel by major areas	
Previous years time spent	
Time required by person	

260

R15 Board Office Accommodation

Documents

New staff (seemingly) required

Staffing report accommodation implication - internal

Staffing report - external

New methods and machines recommended

Feasible system goals

System goals

Management Committee recommendation

(2) ORGANIZATION - EXECUTIVE LEVEL

R02 Interpretation of - Board Policy
                       - Needs and Wants of Personnel;
                         How to Handle

Documents

Statement of problem

M.E. regulations

Law

Board policy

Analysis

(3) ADMINISTRATIVE RELATIONSHIPS

R03   Budget Preparation

Documents

Accummulation file on desired budget expense

Basic form from central office

Desired items with priority attached

Principals opinion

Superintendents prior assess. of needs

Estimated amount for main budget

Supervisor of plant - estimate of prices

Budget for main (implied)

Proposed main budget

Consumable/Cap. Alloc.

Principal's consumable and capital allocation requests

Goals of county system progress

Average per pupil allotments across province

P/T ratios by school

Econ. milieu inflation

Per pupil allotments

Needs of spec. ed. music etc.

Total req.

ME grant regulation

Assessment (by area)

Mill rate

Proposed budget

Revised Budget

Grants ME

Necessary Budget changes approved

R04/S20 How Should Budget Be Distributed Among Schools?

Documents

Amount available

Average in Ontario Boards - consumables

Cost of living

Consumables per pupil

Principals' priorities

Library situation re-equalization

Consumable categories by school

Principal's priorities capital allocation

Formulae for capital equipment

Capital allocation budget totals

Priorities for whole system

Principals' opinions

Capital allocation budget

R05 Budget Control

Documents

Requests

Criteria (P.D.) policy on occasional teacher

Authorized expenditure - item area

Desired expenditures

Printouts by area--over/un-incl. encumbered funds

New requisitions - by area

Principal's request to overspend

Fixed amount authorized

R07   Striking County Pupil/Teacher Ratio

(a)   Secondary

Definition of P/T ratio - trustee's council

P/T ratio by school

P/T ratio across province

Composition - size of schools

Special problems of schools - note special courses

Proportions of program

Reason for deviations

New P/T ratio by school

Extra personnel required

County P/T ratio

Approved T/PARA

(b)   Elementary

P/T ratio across province

Projected enrollment

Size/Types of classes in each school next year

Itinerant teachers - special education, etc.

P/T ratio for each school next year

P/T ratio for county next year

R10 Organizational Changes

Documents

Organizational structure

Perceived problems

Deficiencies in structure

Revised organizational structure

R16 Items to be Referred to Board Solicitor

Documents

Evidence of incident, possibility of involving board in litigation

Case history (all corresponding documentation)

Solicitor's advice (in writing)

Recommendations to board

New advice of solicitor (in writing)

R18 Deciding Whether Items Should be Referred to Board of Handled
     by Administration

Documents

Problem

Presentation to Executive Committeee

Presentation to Federations

Presentation to Administration Council

External information source/other boards

Comments of Executive committee

Comments of federations

Comments of Administration Council

Committee recommendations

Board recommendations and policy

R19   Agenda Items

<u>Documents</u>

Item

Administration Council recommendation

Solicitor's advice

Report on item

Further study by officials

Recommendation on item

Fed. Executive's recommendations

Recommendation re appropriate action

(4) PERSONNEL

R06 Teacher Salary Negotiations

Documents

Teacher projections

Ceilings

Proposed salary and fringe benefits

Total costs salaries

Revenue to be generated from county

R08 Assessment of Secondary Principals

Documents

Desired changes in objectives--Director and Principal

System objectives

Objectives of System translated to secondary school

Job description of Principal

Relationship of Principal to objectives

What other boards do

Principals objectives

Knowledge from coursework ... etc.

Method of evaluation

The evaluation form for that year

Anecdotal file

Evaluation form updated mo.

Principal's self-evaluation

Relationship of principal to objective

Common evaluation report

Needed revisions of the procedure

System objective/Principal objective

Problem identification

R11 Staff Morale and Welfare Problems

Documents

Perceived problem

Perceptions of others on problem

Previous problems raised and personalities

New file on problems, etc.

R14 Leaves of Absence

Documents

Request from teacher

Regulations of leaves

Evaluation of teacher-principal's-supervisor's

Report on case

Admin. council recommendation

Fed. Executives opinion

Recommendation to director

(5) EXTERNAL RELATIONS

R13 Justification of Spending

Documents

Question on expenditure

Board authorization--minutes

Report on justification of spending

Recommendations to board

(6) PLANT PLANNING AND DEVELOPMENT

M12 Accommodation Requirements for Schools - Building
     Proposals

Documents

School population by area

Tentative boundary change

Frequency of prior changes

Space, personnel available in other schools

Effects on other schools

Effects on bus transporation and walking distances

Effect on socio-psych. makeup of children

Criteria - priorities

Tentative changes

Cost estimates

Political implications

Presentation to board - implications, needs, etc.

Decision

M09 Problems referred by Plant Supervisors, Special Education
     and Other Superintendents

Documents

Problem explanation

Problem specification

M01 Accommodation and Maintenance

Documents

Time schedule for year

What was to be done vs. what accomplished during the month
(succ. vs. fail)

M07* Determination of Recommendations Regarding
      Capital Construction Forecasts

Documents

Previous Capital Construction Forecasts

Principals Report to M of E - Current enrollment statistics

Forecasted Enrollment from new subdivisions

M of E Capital Requirements Information

Advice from Superintendents

Facilities policy

Analysis of factors influencing facility requirements

Estimates of future enrollment (from all sources)

Estimated future facility requirements

Board Capital Construction Records

Communications with M of E Regional Office

Experience from previous forecasts

Probable effect of known factors, e.g., new subdivisions, new industries

Capital Construction forecast

(7) PLANT MANAGEMENT

M04 Determination of Recommendations Regarding Salary Proposals for Non-Teaching Staff
   (i) Caretakers
   (ii) Clerical and secretarial staff

Documents

(i) Caretaker wage schedule, benefits

     Comparable schedules in other Boards and industry

(ii) Clerical and secretarial staff salaries

     Teacher settlement

     Caretaker settlement

     Salaries in local offices, public service etc.

M09 Problems Referred by Plant Supervisors, Special Education, and Other Superintendents

Documents

Problem Explanation

(B) LIAISON

MO2 Adult Education

Documents

List of interested people for principal

Interests of target population

Guidelines for staffing

Interested people for staff

Criteria for course offering

Cost by class of program

A desirable program and its staffing

Min. class size by possible class

Fees by possible class (tentative)

Amount to come off top of budget

Fees by possible class

Final response to program

Staffing final program

M03 Summer School:

Summer School Program (Secondary)

Documents

Program, fees (for candidate counties)

Program, fees (of selected county)

Estimated demand for course

Estimated transportation costs

Fee schedule for program

Demand for services

Bus arrangements

Summer School Program (Elementary)

Documents

Tentative demand for program

Program and costs

Where program will be given

Estimate of transportation costs

Fees--by offering

Demand for program

Bus arrangements

Interested teachers

Staffing decisions

Staffing requirements

M05 Staff Requirements for Special Projects Such as S.O.L.F.

Documents

Purpose of project

Orientation ("people" or "product")

Appointment of person in charge if applicable

Structure of project

Requirement for staffing in job description

Responsibility of budget

(9) INSTRUCTIONAL MEDIA DEVELOPMENT

I08 Personnel's Use of Resources

Documents

Material available (on hand)

Catalogues of material

New material available (on hand)

P.D. bulletin--new material available

Updated catalogue

S09 Resource Material Utilization/Involvement

Documents

Raw material

Annotated material

Effectiveness of next strata in getting people to use resources

Updated materials list

(Teachers) opinions on workshop goals, methods

Which teachers to involve in planning etc.?

Who will take part in workshop?

Courses available

Tentative demand for courses

Time people can take off

Courses which will have payment

Who can take what?

Personnel records (of those involved)

10) ORGANIZATION - SCHOOL LEVEL

R20* Assessment of Experienced Teacher Applicants

Documents

Evaluations of other board - by whom
- criteria used
- assessment

Applications

Dufferin criteria

Assessment of applicants

S01 Staffing of Elementary Schools

Documents

Administration and service programs, descriptions and plans

Policy on requirements (staffing)

Skills, experience, interests of all people in system

Positions and skills required for implementation

Unmet personal needs

Skills, interest exp., etc. of applicants requirements

Experience and qualifications, and responsibility, costs

Costs of staffing

Money available

Positions to advertise

Applications, their skills, interests, B & P, etc.

Assignment of selected to schools

S03 Teacher Hiring

Documents

Staffing needs (interests, experience, skills required, etc.)

Applications--note of skills, experience, etc.

Recommended appointments

Positions advertised

S10* Competency of Experienced Teacher Applicants
      Following Consultation With A Superintendent
      of Another Board for Recommendation

Documents

Evaluations of other board - by whom
                            - criteria used
                            - assessment

Applications

Dufferin criteria

Assessment of applicants

(11)   SUPERVISION AND EVALUATION

S02   Evaluation of Teachers (Probationary)

Documents

Principal's evaluation

Principal's recommendation

Superintendent's evaluaiton

Second Superintendents evaluation--if S.R. rejects

Recommendatior. to Director

S03   Evaluation of Principals (Elementary)

Documents

Criteria for evaluation

Data by criteria

Evaluation against criteria

Recommended P.D. program

ITM 15

S06   Promotions of Elementary Teachers

Documents

Openinns available

Skill requirements of levels

Superintendent plus principals annual report on teachers

Resnonses to internal advertising

List of candidates (internal)

List of outside candidates

Short list of internal candidates

Recommendations

S07 Agenda Items - Education Committee
                  - Education Council

Documents

Agenda previous years

Topics not dealt with

Interim report given, final still expected

Completed topics

Requests for net topics

Tentative agenda, topics next year

Structure of monthly agenda

S08/M10 Necessary Changes in Attendance Areas

Documents

School pop. by area

Tentative boundary change

Freq. of prior changes

Space, personnel available in other schools

Effects on other schools

Effects on bus transportation and walking distances

Effect on socio-psych. make-up of children

Criteria - priorities

Tentative changes

Cost estimates

Political implications

Presentation to board--implications, needs, etc.

Decision

S11 Planning of Professional Development Programs

Documents

Resources--progress to date Administrative Council

Resources--progress to date Fed. Rep.

Resources--progress todate Department Heads, Principals, Vice-Principal's

Summary--resources - what's been done

Time required for regular duties (super/leader)

Needs and priorities of Principal

Advice of Administrative Council

Summary of needs and priorities

Residual time--priority, resources available

Total program (voluntary below county level)

Needs and priorities (Federal Reps.)

Targets for P.D.

Structure of new program (desirable)

S12 Resources for Professional Development Program

Documents

Total program

Personnel resources available

Resources required from central budget

People responsible

Desirable resource material

Reports of books, articles, films, tapes, etc. from conferences

List of courses outside

Working papers at conferences

List of worthwhile material

S13 How to Keep Teachers Updated in Current
     Trends, Concepts and Practices

Documents

Present method - P.D. Bulletin
                - supervision
                - conferences
                - intervisitation
                - have their review book films etc.

Strengths, weaknesses of staff

Structure of new program

Modification if information dissemination system

S14 Performance Criteria for Principals/Vice-Principals

Documents

Last year's criteria

Criticisms by P's and V.P.'s

Criteria to be modified

Standards in industry

New set of criteria

Evaluations against criteria

(12) EDUCATIONAL PLANNING

S04 Curriculum Development

Documents

Assessment of present program (ITM 9)

New needs (ITM 11)

Priorities of needs (ITM 13)

Review of present curriculum in print (ITM 10)

M.E. guidelines (ITM 12)

Terms of reference for committees

Available personnel

Assignment of people to committees

S16 Assessment of Academic Program

Documents

Standardized test result (by class) - new results and previous years

Questions on anomalies

Answers (tentative) to question

Decision on appropriate action

Comparison of performance with previous years

Comparison of system against norm (by grade level)

S15 Program Modification

Last year's P.D. program

Goals of P.D./targets of P.D.

P.D. progr.. in other counties

Feedback from principals

Changes in curriculum

Suggested modifications

(13) ACADEMIC BUDGET PROCESS

S17 Elementary School Budget/S18 Secondary School Budget

Documents

Board objectives

Special needs of students

Special staff requirements

Projected enrollment

Availability of monies

S19 Total Academic Budget

Documents

Advertising estimate

Professional development estimates

Cost of resources

Subscription costs - distribution cost, etc.

Estimate of cost for program modification
    - materials
    - new staff
    - retraining staff

Curriculum development

Assessment of Academic program

School Budget - Elementary
              - Secondary

Monies available

Preliminary Academic Budget

(14) FINANCE

B02*/R21   Determination of Items for Inclusion in Monthly
           Financial Reports to Board

Documents

Computer print-out sheets

Revenue and expenditure items

Balance sheet items

Suggestions from Accountant

Monthly Financial Report to Board

B03*/M07   Determination of Recommendations Regarding Capital
           Construction Forecasts

Documents

Previous Capital Construction Forecasts

Principals Report to M of E - Current enrollment statistics

Forecasted enrollment from new subdivisions

M of E Capital Requirements information

Advice from superintendents

Facilities policy

Analysis of factors influencing facility requirements

Estimates of future enrollment (from all sources)

Estimated future facility requirements

Board Capital Construction records

Communications with M of E Regional Office

Experience from previous forecasts

Probable effect of known factors, e.g., new subdivisions, new industries

Capital Construction forecast

B05*/M11 Determination of Information Required at Various Stages
          Regarding Applications for Building Approvals

Documents

Information required of - M. of E., O.M.B., D.E.C.A.C.

Direction of CMTE. (man. or Admoc.) re building required

Direction re architects

Local site requirement--from lawyer

Site information - final building plan

Debentures needed

Plans from architect

Information to M.E. re a) building proposal
                      b) sketch plans
                      c) working plans
                      d) final approval

Submission to O.M.B.

By-law required from O.E.C.A.C. for building approval

Final plans from architect

Tenders submitted

Information required progress to building committee

P06 Answers to Public in Answer to Requests for
     Information Regarding School Areas, Bus Routing,
     Accident Insurance Claim Problems, Sale of School
     Buildings, etc.

Documents

Inquiry

Board policy

Information from other sources - Superintendent of Curriculum instruction
                                - director
                                - plant
                                - M.E. - Pen. Office
                                         Special Office
                                         (Pertinent to problem)

- levy information
- school bookings

P08 Evaluation of Financial Accounting Department Staff

Documents

Previous evaluation forms

Revised forms for Supt. Plant

Revised forms for Director's Secretary

Completed evaluation

Performance Review Document

(15) TRANSPORTATION MANAGEMENT

B01*/M06 Answers to Public Regarding Requests for Changes in
          Operations of the Transportation System

Documents

Inquiry

Board Policy

Information from sources - sup. curr. instr.
                         - director
                         - plant
                         - M.E. - Regional Office
                                - Special Office (Perintent to problem)
                         - levy information
                         - school bookings

B10 Determination of Transportation Arrangements with
     Bus Operators - Routing, Loading, Payment

Documents

Present schedule

Arrangements in other boards

Suggestions of operators

Proposed revisions

Presentation to committee

Report to board

M06* Answers to Public Regarding Requests for Changes
      in Operation of the Transportation System

Documents

Inquiry

Board Policy

Information from other sources - sup. curr.
- director
- plant
- attn. office M.E. - Reg. Office
- Special Office
- levy information
- school bookings

(16) DATA PROCESSING

(17) PURCHASING AND STORES

P04 Determination and Review of Suppliers and
     Specifications for Purchase of Standard
     Supplies and Payments

Documents

Last year's quotation request form

Advice re qual   suggested ar ition or deletion of items

New quotation request form

Filled out O.P. form

Total orders

Quotations

Orders issued

18) BUDGETING AND BUDGETARY CONTROL

807 - Consideration of Cost of Operation of Schools and
Results - Decisions Concerning What Should Be Done
About Problem Indicated - Monthly Report Inclusion
if Necessary

Documents

Print out for each school by function

Divergences from budget and causes (expenditure items)

Report (suggested action) to MAN. CMTE.

Report on Man. Cmte. decision

Recommendation to board

809 Determination of Local Levies for Education

Documents

From other boards, ME/Grant information

Budget information from director and Man. Cmte.

Assessment information prior records by area

Assessment information (from assessment department) present
assessment by area

Prelininary budget - estimate of local levy

Official grant regulations

Final assessment information

Final budget

Levies

B11   Budget Compilation

<u>Documents</u>

Methods of other boards

Wishes of Principals and trustees

Suggestions to Accountant

Form of presentation - previous years

Form in other boards

Opinion of Accountant

INFORMATION TRANSFORMATI   MODULES

ITM 1   Enrolment Project s (Twice   ly)

Documents

Previous pr ections s.

Census - are specifi

Survey resu

Formulae re   sing

Present stud   enrol en

Staging plans

Applications   om cu e

5 year projec - 3 years   October; student by age and area

Expected number int   an ou   county

ITM 2   Revenue Proje ions   wice Ye ly)

Documents

Projected e   lme   - total elementary - total secondary
Within cour   outside county, expected number in and
out of cour

M.E. guess   ant structures

Present gra   ruc ure

Board policy   ayment of fees into and out of county

5 year project tal grants and tuition in - tuition out

ITM   Maintenance Cost Projections

    Documents

    Historical data on school maintenar

    Standard costs

    Facilities projection

    Expected maintence-mulae)

    5 year projecti--enance cos--ear actual

ITM Debt Charge Pro-s

    Est. Rev. for 5

    Documents

    Previous debts

    Estimate rever

    Likely salarie

    Other costs

    Consumables - nd per pupil

    5 year proj. - debt charges - est. rev. available

ITM 5 Bussing Costs Projection

    Documents

    Pupil/teacher ratio

    Enrol. proj. by area

    Formula of special vs. normal

    Individual school needs

    Para professional/teacher

    Courses being taken

Special vs. normal demand

Grid

Retirements planned

Position of newly hired, past (same grid. structure is assumed)

Projection of grid structure

ITM 7   Facilities Projection

Documents

Enrol. proj. by area

Board policy K-8, 9-13 system

Present facilities inventory

School attendance boundaries

M.E. policy on facilities

Extra facilities req.

ITM 8   Amount Available for Schools (Jan.-Feb.)

Documents

Revenue projection

Ceilings

Main costs

Salaries (est.)

Mill rate decisions

Debt charges est.

Bussing cost est.

95-5 split of amount available for schools

Assessment of Present Proc---

Documents

Parents:

1. Social beh.
2. Peports
3. Employability prectical skills
4. Teacher's commers
5. Preparation for next acad. level

Principal:

1. Social beh.
2. Academic - standard tests
   - teacher constructed tests
   - report cards
3. Past achievement records
4. Parents comment:
5. Superintendent's comments

Teacher:

1. Social beh.
2. Academic beh.
3. Anecdotal reports of teacher
   - psychologists
4. Comments of principal/superintendents

Informal report on home assessmen'

Formal report on school assessment

Formal report on classroom assessment

Interests, employability pract. skills, prep. for next level

Report on student assessment

Superintendents' assessment

1. Achievement tests county wide
2. Achievement trends
3. Employability
4. Dropout rates
5. Interschool comparisons
6. Community impressions re-board
7. Social beh. - common level

ITM 10   Review of Present Curriculum in Print

Documents

M.E. present guidelines

Local program aims at county level

Institutional objectives

Teacher obj. and validity in light of inst. obj. and county's
aims and guidelines from M.E.

Report of review

ITM 11   New Curriculum Needs

Documents

Student needs - social, academic physical

What behavioural changes sought

Research study which indicates needs

Reasons for rejection or acceptance

Costs in training personnel and reorganizing to
accommodate a new program

Report on poss. new program

Report to curriculum committee

ITM 12   M.E. Guidelines

Documents

Compare with present program

Present program flexibility

Changes from old guidelines

Change req. and costs

ITM 13 Priority of Needs

    Documents

        Total cost of possible curr. mod. and new program

        Total cost of other ed. prog.

        Amount available for curr. dev.

        Political considerations – parental demands
                                     - student demands
                                       - government demands

        Priorities

ITM 14

    Documents

        Total elementary instit. budget

        Possible additional funds

        Present demands

        Present funds available

        Possible redistribution of funds

        Board approval

        Money available

ITM 15 Data by Criteria (Evaluation of Elementary Principals)

Programs

Documents

Innovations   )
)
Learning outcomes   )
)
Suitability   )
) Performance
Student services available   )
)
Outside resources used   )
)
Test results   )
)
Extra curricular available   )

Teacher Development

Documents

Number of staff in a) professional courses)
)
                    b) academic courses   ) Performance
)
                    c) workshops   )

Numbers and kind of study groups

Prof. journal and library added to school

Staff involvement in county curriculum development

Administration of School

Documents

Accuracy and punctuality of reports   )
)
Within budget?   )
)
Budget based on school needs   ) Performance
)
Plant maintenance   )
)
Accurate up-to-date records   )

Influence

    <u>Documents</u>

    Involvement in (a) Professional Development program

               (b) Curriculum Development program

               (c) Admin. Council

Public relations

    <u>Documents</u>

Parents advisory council	)
Meeting with the parents	)
Parents counselling	)
Civic clubs	) Performance
Comm. use of schools	)
Use of community resources	)

School Organization

    <u>Documents</u>

Use of school personnel	)
Use of space	)
Governing structure - staff involvement in	)
(1) budgeting	) Performance
(2) policy	)
(3) student council	)
(4) other	)

    Scheduling