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ABSTRACT
        In 1989 the Peel (Mississauga, Ontario) Board of
Education launched its strategic planning process. The board surveyed
or gained the direct involvement of large numbers of students, staff,
and parents to determine what direction the school system needed to
take to maintain its level of quality. Through its efforts the board
concluded that the system needed to be guided by a set of values that
emphasized lifelong learning. In a set of appendices the document
presents the findings and recommendations of action teams that
addressed the specific topics of values and discipline, school
programs, school success, human resources, new partnerships, and
values and vision. A final appendix identifies the strategic planning
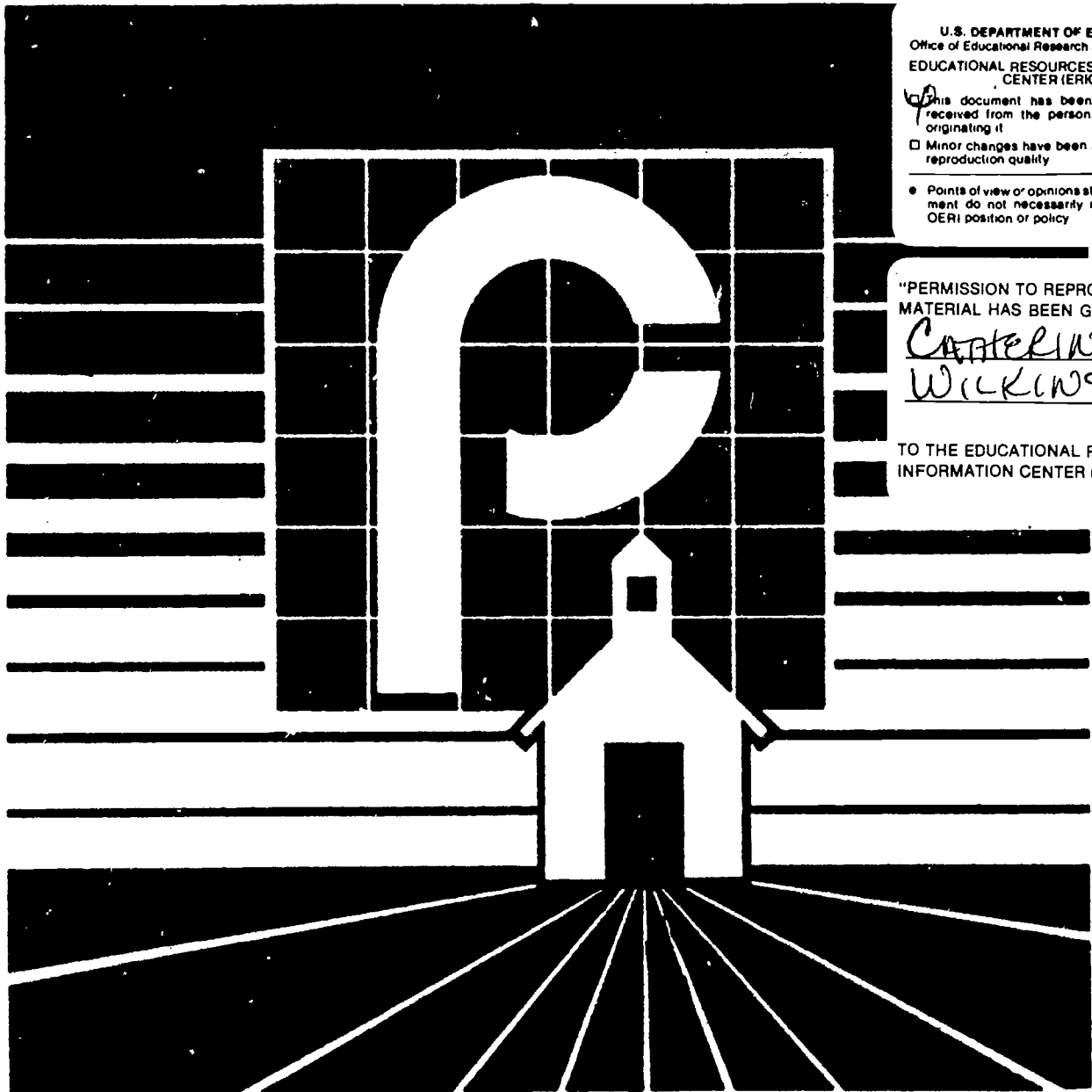committee of strategic partners' members, work group, and action team
chairs. (SG)

February 10, 1992

ED 370 856

Strategic Planning Summary Report

SO 023 809

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BACKGROUND

Strategic planning inevitably involves a great deal of information gathering and work to generate a few *fundamental shifts in direction* for the organization which finds itself confronted by the need to change.

The Peel Board of Education launched its strategic planning process in June 1989. Through the next year large numbers of students, staff and parents were either surveyed or directly involved in identifying the new directions which the Board needed to consider if it wished to maintain its enviable reputation for quality education. The steering committee of System Partners reported to the Board during 1989-90 providing an audit of the data it had gathered. In its summative report in June 1990 the System Partners set out the global directions for the Board to consider.

The overwhelming message of the first stages of the strategic planning process was that the school system needed to be *guided by a set of values*, underpinning a mission that emphasized *lifelong learning* and striving to be the best at everything the school system committed itself to do. While some cynicism is always to be expected, the System Partners group is pleased with the response to the statement of vision and values which the Board adopted; through time, it should have a significant effect on our decisions and behaviour.

The strategic planning process has unfolded at a time when funding issues and fiscal constraints have been a priority for the Board and its administration. In some ways, hard times make the need to plan in a strategic durable way even more necessary. The System Partners have helped the administration and the Board to maintain a truly strategic perspective through two difficult years. The emphasis on team work and collaborative decision making, that characterized both the strategic planning and the budget development processes, has been important to the school system. In particular, the Director's Council has been guided during the past two years by the findings, directions and activities of the strategic planning action teams as they prepared recommendations for the Board.

This report presents the final recommendations of the Strategic Planning (steering) Committee of System Partners. The members of this group are identified in Appendix 7.

The Action Teams

From where did these recommendations come?

Upon identification of the key directional issues for the school system, the Board approved the establishment of six action teams to prepare specific proposals to implement strategic planning in Peel. These teams of trustees and representative staff have been dealing with six basic questions over the past year: What should our *program priorities* be and with what *resourcing*? What *human resources* will be needed in our changing schools? What *partnerships* can be built with our changing communities? To what extent should schools have greater *site authority* to educate children? What *values should be taught* and what disciplinary practices put in place to ensure a safe, ordered learning climate? What can be done to develop genuine commitment to the *vision and values* espoused by the Board?

The work of the action teams has progressed at an uneven pace. Interim reports have already been made to the Board by the Human Resource, School Success, Programs and Partnerships teams. Attached to this report are the final reports for all five action teams, along with a description of the continuing work of the Vision and Values staff development group. While we ask the Board to consider each of these reports by themselves, the steering committee of System Partners wishes to focus attention on the larger picture, on those shifts of value or direction which we believe the school system must consider. This summary report briefly describes them, in an integrated way.

The Organizational Renewal Project

Many of these fundamental shifts have already been communicated to the Board through the report of K. Koehler of Peat, Marwick, Stevenson and Kellogg on organizational renewal. The consulting group worked closely with the strategic planning teams and used many of their recommendations to describe the context in which organizational renewal should occur. It is not surprising but nevertheless

it is reassuring to us that the **consultants reinforced** the directions and the values that strategic planning groups have emphasized. We are *a learning organization* as much as we are a teaching system. *Continuous improvement* as a goal is the vehicle proposed by the consultants to satisfy our intention of "striving to be the best". Strategic planning and longer term budgeting are seen as essential to such improvement. These are continuing processes rather than specific projects or events. We are pleased that the strategic planning and organizational consulting reports are so complementary. They describe a future of opportunity for Peel's schools despite difficult challenges.

The Critical Shifts

This September the System Partners group met for lengthy discussions with the chairs of the action teams to go through their final reports. Out of those discussions we identified a small number of *critical shifts* the school system should make. It was clear to the System Partners group that a large number of current processes or commitments of the Board were reinforced; the reports provide a foundation for much of what is being proposed. Finally, it has become clear that most of what we recommend has already begun to take effect in the schools and the Board. Open planning processes generate their own movement. People don't wait for reports if the directions seem right; nevertheless, these changes deserve description and official support.

The key message for the future is that the quality of education in Peel is only guaranteed by focusing our planning and resources on ensuring that each and every school is successful. While it is important that the Peel school system achieves a high level of quality, this can only be genuinely accomplished by improving each school. We need to plan for the *continuous improvement of every school*, support the schools in meeting community expectations, clearly assess the implementation of such planning, celebrate our successes and acknowledge any shortfalls. We need to establish a set of expectations for all Peel schools, with clear indicators of success, and help each school meet those expectations. The Board must do all it can to ensure that those expectations are reasonable, focused and appropriately communicated and supported.

As a result the energies of administrators must shift from supervision, which can only ensure ordinary acceptability, to support for continuous improvement. Increased flexibility in the use of resources by schools will be necessary, as will increased tolerances of *differences among schools* as they tailor programs to their diverse communities.

The senior administration must be responsible for *leadership and support* to schools. They must also provide *honest assessment* of success or failure. The reorganization of the administrative structure into teams will facilitate these shifts but it is important to recognize that the real change will occur when attitudes change. This will mean a shift from command and control to service, support and accountability.

Most of the other proposals from the action teams support this fundamental change.

The school system is being urged to open itself up to a wide range of mutually productive *partnerships*, particularly with the business community. As the report demonstrates, this goes far beyond seeking funds or satisfying commercial priorities in education. Good models already exist and Peel needs to be more aggressive in building links to business and other educational, government and social institutions.

The emphasis in Peel classrooms must shift decisively to the *teaching of positive values and personal skills*, especially learning skills. While the current curricula move us in this direction, Peel needs to also stress a common set of values and skills. The Program Action Team sets out what can be done through time but it is urgent that a focused set of priorities and supporting plans be established fairly quickly.

In its report, the Values and Discipline Team reinforces many of the practices that currently exist to support an orderly climate of learning. We have the legislative authority we require; we support the schools with disciplinary decisions; we give good legal advice; the support of multiculturalism and race relations staff

is appreciated. However, there is clearly a need to *revamp our behavioural program* to make it more effective and there is a need to make the teaching of values a priority. We are convinced that many of the remedies for behavioural problems and inconsiderate or anti-social attitudes depend on *early intervention* in our schools.

Can a common set of *positive values* be taught in a multicultural community? The action team believes it is both possible and desirable. We need to identify the values which currently motivate our young people and their parents, and determine if school-based values are compatible or realistic. Research suggests they are for a majority.

Few of our human resource policies or practices have been identified as needing change; rather, reinforcement of many current services is proposed. Still, we do not *celebrate our achievements* and our achievers enough. Nor are we seen as reflecting the current societal mix of cultures in our schools and offices. Recognizing that teaching staffs will likely always reflect the cultural mosaic of the past, since it takes over two decades just to enter the profession, there is still a need to encourage and expand our *recruitment and promotion of visible minorities*.

Our current *staff development commitments* are not adequate. A plan that goes beyond professional development days and that more precisely supports leadership development, the delivery of new programs and training in new skills is required. Staff renewal should not be a frill. Professional development needs to become an integral part of all planning for change. As a result, some reallocation of current resources must be considered.

The issue of *site-based management* has been thoroughly discussed and debated through the strategic planning process. The evidence is that teachers and principals want to be free to do their jobs. They do not want to be as busy as they currently are with working the system to get staff, resources, repairs

and other services. They need more flexibility in the use of resources they now receive. Two issues have not been resolved by the strategic planning process but they have been clearly identified: how can **greater control over in-school staffing** be provided? How can **services to schools** be improved if there is not enough money to provide them?

The strategic planning process has reinforced a number of other assumptions, for now. There is a strong desire for **a co-operative relationship with the Dufferin-Peel Roman Catholic Separate School Board**, with many more integrated services. There is great support for the family-of-schools organizational units and management through field offices. While Peel is considered very big, perhaps too big at times, there is a sense that schools would be worse off if the system was divided on municipal boundaries. There is a sense that communications are improving. The emphasis on **teamwork in decision making** is considered realistic and productive.

Finally, the question remains with many people whether this school system has been through an exercise in strategic planning or whether it represents **a genuine commitment to a better way** of meeting our responsibilities. Those of us who participated in the work have found it exhilarating and practical. We believe we have seen good results flow from it. We know the proposals in this report will receive full consideration by the Board and its administrative staff. We trust that the values it projects will spread. We hope that the directions it recommends will become a reality.

RECOMMENDATIONS:

The following recommendations from the Strategic Planning Committee of System Partners have been designed to provide strategic directions to guide decision making and action at every level of the system. They describe those critical shifts which we believe this school system must make if it is to be faithful to its mission and its values.

It is recommended that:

1. A set of values be taught and instilled in all Peel schools to develop a commitment to the building and maintenance of a uniquely Canadian culture that rests on:

    1.1 commitment to the importance of lifelong learning, teaching and achievement
    1.2 social responsibility and respect for human rights
    1.3 respect for cultural/racial differences and universal human dignity
    1.4 equity for all
    1.5 encouragement of self respect, physical and mental health
    1.6 responsibility for environmental quality
    1.7 concern for the well-being, security, property and dignity of others
    1.8 commitment to honesty and truthfulness.

2. Schools ensure that school improvement plans describe what will be done to teach and demonstrate these values.

3. All constituent groups (students, staff, parents) be involved in the development of school values and discipline statements to reflect these values on a continuous basis.

4. Behavioural services be expanded to improve the level of resourcing and to shift the focus to early intervention.

5. The Board work with other levels of government to encourage the improvement of community services and treatment capability beyond the school system.

6. Elementary guidance programs and services be enhanced to support early intervention.

7. The social work resources be directed to earlier intervention for students of compulsory school age and the burden of responsibility for attendance for older students be shifted more directly to parents and students by reinforcing that absenteeism has direct educational consequences.

8. The Peel school system pressure the Ministry of Education for revisions to the regulations to provide for a wider range of social and educational solutions to the problems of habitual absence.

9. Staff development programs be expanded to provide training for people to manage student behaviour and create more positive school climates including the following:

   9.1 a school-wide focus on an appropriate learning environment and a positive school climate or tone

   9.2 classroom management principles, including general classroom management skills and specific management techniques

   9.3 specific behaviour change techniques including modification and social skills instruction

   9.4 student/student relationships including co-operative learning, peer helpers, conflict resolution, and social skills groups

   9.5 teacher/student relationships including enhancement of student motivation to learn and effective active instruction in a democratic classroom

   9.6 teacher/parent relationships including effective communication

   9.7 specialized student needs such as separation and divorce groups, social skills groups, communication problem solving, leadership training, and crisis response

9.8 specialized teacher needs including stress management, behavioural strategies and planning for behavioural programs and crisis response

9.9 specialized needs of consultative staff working with classroom teachers.

10. A process be outlined for the development of a skills continuum that is correlated to the developmental stages of children building on approved curricula already in place and/or under development.

   Current Status: A plan of action to develop a Peel Skills continuum has been developed. This plan is consistent with the Organizational Renewal Report and will be managed by the executive superintendent of Instructional Programs.

11. A planning process be initiated that results in an annual work plan (with appropriate resources and role expectations) for program implementation that is viewed in the context of a multi-year regional and departmental plan communicated each spring.

   Current Status: This is underway.

12. A school improvement plan be established for each school incorporating both school and Board objectives in a mix that reflects the diverse local needs of the students and their communities.

13. A model for student and school assessment be developed to produce data for planning, program design, accountability and reporting of achievement and accountability.

14. The principal evaluation process be modified to focus on leadership of school improvement with principal and vice-principal evaluation as major components of the school review process.

15. A system assessment and evaluation model be developed building on the data from school and student assessments, as well as from regional and provincial reviews.

   Current status: As a result of reorganization, the responsibility for assessment has been assigned to the executive superintendent of Assessment and Planning.

16. Wherever possible the annual budget be restructured so that more funds go directly to the schools, using new funding formulae that include consideration of the following factors: enrolment, program composition and age of the school and equipment.

17. There be increased flexibility in the purchasing and accounting procedures at the school to allow for the allocation of funds to meet school identified objectives.

18. A mechanism be developed to establish capital accounts that carry funds beyond the fiscal year.

   Current Status: These recommendations are being considered in the 1992 budget development process.

19. There be a thorough investigation of the feasibility of creating more control at the school of academic and non-academic staffing to allow schools to respond to specific short or long term needs.

   Current Status: Such a study is being developed by Staff Resources as a result of the Organizational Renewal Project.

20. Staff development be delivered to the system through a regional department and through site based programs, so that:

20.1 The Regional Staff Development Department will be responsible for:
   - the delivery of corporate programs and activities
   - the management of regional functions
   - the support of site-based staff development activities

20.2 Site-based staff development programs will be developed under the leadership of the site supervisor, to reflect the values and vision of the Peel Board and regional expectations, while specifically addressing local needs.

20.3 Appropriate resources (in the form of people, money and staff development expertise) be provided to the appropriate locations to meet and address the needs at both the regional and site level.

Current Status: Planning for these proposals is underway as a result of the Organizational Renewal Project.

21. The Human Resources Department develop strategies for recruiting, orienting and accommodating employees with special emphasis on the four government identified disadvantaged target groups: women, members of visible minorities, challenged people and Native people.

Current Status: This is underway.

22. The Human Resources Department take responsibility for developing and co-ordinating employee suggestion programs, awards and recognition activities that will motivate, invigorate, renew and empower staff. This will result in a commitment to continuous improvement throughout the Peel Board.

23. The administration undertake a review of all staff evaluation procedures and develop an integrated, effective, and efficient practice that will lead to the continuous improvement of all Peel Board staff.

   Current Status: This is being addressed, as described in Recommendation #15.

24. The Peel Board of Education commit itself to a working environment which is healthy, safe and supportive, free from bias and which enhances staff opportunities to work to their fullest potential and therefore contribute to greater student success.

25. The Research Department undertake a comprehensive study of work place stress which would determine the source of stress, as perceived by employees, so that strategies can be developed to address the concerns and demonstrate a commitment to employee health and well-being.

26. That the Peel Board of Education make a commitment to actively pursue new partnerships with business, government, other educational institutions and community service agencies.

27. The Peel Board of Education establish a formal regional partnership structure which would include education, government and business (including labour and professionals).

28. Regional guidelines should be developed to help each school develop and maintain their own partnerships with community and service groups.

29. The Peel Board also seek out individuals and corporations interested in providing sponsorships and donations of time, services, goods and financial gifts according to agreed upon guidelines to avoid conflicts of interest.

30. There be system-wide integration of values and vision statements into all facets of Board and school level decision making policies, routines and operations through activities that promote the Peel values and vision in action.

31. Annual reports on the status of strategic planning initiatives be provided to the Board until a summative review can be undertaken no later than 1995.

THE RESULTS

Should the Peel school system commit itself to these directions, we believe it will demonstrate the following characteristics:

- highly successful schools that support their neighbourhoods

- a genuine commitment to continuous improvement

- school improvement plans that are realistic, understood and supported by staff, students and parents

- a curriculum and teaching that emphasize durable values and skills

- continuous learning by all the staff, improving their own skills to help others

- assessment processes that identify strengths, opportunities and needs for improvement

- staff evaluation processes that stimulate improvement and guarantee accountability

- mutually productive partnerships among schools, businesses and community agencies

- efficient use of all resources, to support the commitments each school chooses to make

- respect for schools, for teaching and for responsible authority in each community

- decision-making that is open, collaborative, well-informed and focused on demonstrable improvements

- highly satisfied clients, staff and public supporters

- a spirit of community-building, with mutual respect among the many different groups who live in it, centred on each school.

These cultural values may seem idealistic but a large body of research on effective schools suggests that they are critical to the success of any school. With sufficient commitment we should be able to build and maintain a high quality school system over the coming decades, school by school.

ASSESS3186

THE PEEL BOARD OF EDUCATION

VALUES AND DISCIPLINE ACTION TEAM FINAL REPORT

Prepared and Submitted by: John Amon - Special Units
Jack Black - Port Credit S.S.
Sandra Buckingham - Hazel McCallion Sr. P.S.
Garry Campbell - Special Services Dept.
Terry Chaffe - T. L. Kennedy S.S.
Daryl Cook - Program Dept.
Michael De Angelis - Clarkson S.S. (Chair)
Melanie Evans - Byngmount Beach P.S.
Rosemary Evans - Program Dept.
Sue Harper - Program Dept.
Janette Holmes-Allen - The Humberview School
Russ Jones - Lyndwood Field Office
Janet McDougald - Trustee
Elaine Moore - Trustee
Dana Riddell - Special Services Dept.
Zubeda Vahed - Operations Dept.
Dave Weldon - Operations Dept.

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VALUES AND DISCIPLINE ACTION TEAM

BACKGROUND

The Peel Board of Education approved, in June of 1989, the establishment of a strategic planning project. In June of 1990 the Board approved the "Directions for Renewal" strategic planning report. This report established Five Action Teams with the mandate to focus on five specific areas. As well, it provided for the establishment of a sixth action team with the mandate to reinforce commitment to the Vision/Values statement approved by the Board. The Values and Discipline Action Team was charged with the development of a strategic plan for the teaching of values and the maintenance of discipline to ensure an orderly climate for learning. Specifically, the Values and Discipline Team was directed to:

1. review the audit material provided by the strategic planning process and develop a statement of expectations for the teaching of values in Peel schools, toward the maintenance of an orderly climate of disciplined learning.

2. use the work already completed by the Operations Department work-group which has been developing proposals on school discipline.

3. develop recommendations on both:

   3.1 the teaching of values in Peel schools

   3.2 the improvement of discipline in the schools

EDUCATIONAL MANDATE

There exists a need for the Board to clarify its educational mandate, including the following areas; the teaching of values, the development of student self-discipline, and the delivery of social services. Until relatively recently, the partnership among the school system, the family and the community was entered into on an equal basis and was sufficient in meeting the needs of the majority of students. The trend, over the past two decades, however, has been towards the school system assuming an ever increasing role. This shift has resulted in a steady expansion of the "educational mandate" and has placed new demands on available funding. In times of resource scarcity the climate exists for the system to re-think and re-define what it is that the system believes it should be delivering under its "educational mandate".

OVERVIEW

The members of the Action Team began by reviewing the audit, the staff, parent and community surveys, the explorer reports and work completed by the Operations Department, and by senior school and secondary school administrators: specifically, the Report on School Discipline and Security (grade seven to O.A.C.). The community and the system identified the need to consistently articulate, teach, and reinforce values. Emerging as well is the recognition that maintaining a

disciplined learning environment in schools is increasingly more difficult. These responses are not surprising, given the rapidity of societal changes in the areas of economics, politics and social structures. It would be strongly noted that, in spite of the identification of these issues, responses indicated a confidence in the ability of the system to convey values and to ensure the maintenance of a safe and disciplined learning environment for students. Concerns centered around the need for the system to focus on these aspects of education in the face of the magnitude of the changes taking place within society.

The basic premises guiding the work of the committee towards the teaching of values and the continued maintenance of a disciplined learning environment were:

-   the existence of a common set of cross-cultural values

-   the need for responsiveness to ongoing change

-   the recognition of a direct correlation between school success and a positive disciplined learning environment

-   the need to model values

-   the need to teach values

-   the belief that discipline flows from values

-   the recognition of limits beyond which inappropriate behaviours will not be tolerated

-   the recognition of staff development as a critical element

-   the need to involve the total school community in the teaching of values and the development of self-discipline

The team sees values and discipline as being inextricably linked. Positive discipline and student success flow from the internalizing of values by students, as well as from the imposition of appropriate consequences by school authorities.* Behavioural concerns will not be eliminated solely by the adoption and teaching of values; Board and school policies dealing with these concerns remain necessary. The Board's commitment to and ongoing review of its ability to deal effectively with extreme situations within the context of staffing, resources, facilities, and Board policies should continue.

Effective schools literature suggests a positive correlation between an emphasis on student self-discipline and the Effective School. As well, these studies suggest that firm and clearly articulated expectations for student behaviour are present in those schools identified as being highly effective. Further, these studies suggest that effective schools are those that are able to develop and maintain a positive, mutually supportive relationship between the school and the community. If Effective Schools are defined as those schools that graduate students committed to the concept of life long learning and ready to assume a positive productive role in society then our purpose will be served by them.

*   It is apparent that students enter the school system with different levels of social skills development. Given this recognition there needs to be an appreciation of differences in terms of the amount of responsibility that

students assume for their behaviour related to their age. The assumption is that students, as they develop physically and emotionally and progress through the school system, will acquire a personal set of values consistent with the concepts of positive self-esteem, positive sound interaction with others and with life long learning.

OUTCOMES

Of primary importance to the team was a focus on the desired outcomes for students, the system and the community within Peel. These outcomes include:

Students: - a positive self-concept
- a commitment to life long learning
- the ability to resolve conflict positively
- a demonstrated respect for individual differences
- enhanced decision making skills
- development of a personal value system
- an enhanced sense of social responsibility

System: - the maintenance of a safe, positive learning environment conducive to the teaching/learning process
- a commitment to life long learning
- the utilization of consequences appropriate to the developmental stage of the individuals involved and the seriousness of the situation
- a reduced need for resources expended managing negative student behaviours
- establishment of a common cross-cultural value system modeled through processes and interactions

Community
/Home: - a positive sense of collaboration with the school system
- confidence in their school system

If these outcomes are to be actualized it will require the active involvement of students, staff, parents and community. There is a need to ensure that the richness of cultural diversity and life experiences and the resulting perspectives of those using the system are represented. In many cases the processes and mechanisms for involving these groups are in place; where they do not exist they need to be established.

As stated at the outset, the development of a personal value system will contribute to positive attitudes towards self, others and the learning process. The presence of these attitudes will surely have an impact on student behaviours and the learning environment in schools. It must be recognized that fostering the development of this value base is not the sole responsibility of the school system. The community and parents share with the school system the responsibility to instill and reinforce values.

VALUES

It is imperative for the school system to identify and articulate a common set of cross-cultural values. These common values form the basis for the establishment of a sense of community for those within the school system. They become the guiding principles for all inter-personal interactions. The development of a common value

base for those in the school system permits greater ease for individuals to understand and empathize with other's viewpoints and provides a greater likelihood that problems can be solved in a positive manner.

Values have been and continue to be dealt with within the context of the programs offered in our schools. An examination of Peel Board curriculum was undertaken to determine the extent to which values are present within each curriculum area. The following common value areas were identified:

- respect for cultural/racial differences and universal human dignity
- commitment to equity for all
- encouragement of self-esteem/respect for self
- willingness to accept responsibility for environmental quality
- concern for the well being of others
- commitment to a co-operative approach to problem solving
- social responsibility, citizenship and humanitarianism
- commitment to honesty/truthfulness

These areas encompass and are congruent with those garnered from the committee's sampling of different cultural groups within the region. They are also consistent with what Alan King reports in "The Adolescent Experience" and the findings of Mary A. Hepburn in "What is Our Youth Thinking? Social Political Attitudes in the 80's", that students for the most part share similar traditional values with their parents. Further, this list of core values is consistent with those identified by the School Programs Strategic Planning Action Team in their report. The committee found it useful to organize these values under four educational values categories.

- worth and dignity of the individual
- respect and caring for others
- social responsibility
- sense of responsibility for the environment

Notwithstanding the presence of these values within the curriculum it must be recognized that, unless they permeate the culture of the school and the system as a whole, they will have a diminished impact on students. These and other attending values need to be modeled by all employees and participants in the system. Each and every teaching moment must be seized, be it in a corridor or on the playground or in the staff room, to reinforce these values. Pedagogy and teaching strategies may also need to be modified to ensure that they provide opportunities to deal with values and value related issues effectively.

An analysis of both Peel elementary and secondary school policies related to behavioural expectations for students revealed a set of highly consistent and specific expectations.

These included:

(a)   encouragement of respect for people and property;
(b)   encouragement of tolerance of the differences among people;
(c)   the encouragement of regular attendance;
(d)   refraining from the use of tobacco, drugs and alcohol;
(e)   prohibition of the possession and use of weapons.

In addition, the values of honesty, co-operation, self-discipline and a positive work ethic were seen as highly desirable.

As the attached model suggests, the four main educational values categories identified should be used as a common basis for planning and as such should be reflected in the items outlined on the model, including statements concerning expectations for student behaviour.

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│                                                 │
│                    SYSTEM                       │
│                  CORE VALUES                    │
│                                                 │
│        - worth and dignity of the individual    │
│          - respect and caring for others        │
│              - social responsibility            │
│    - sense of responsibility for the environment│
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              │    SCHOOL VALUE        │
              │    STATEMENTS          │
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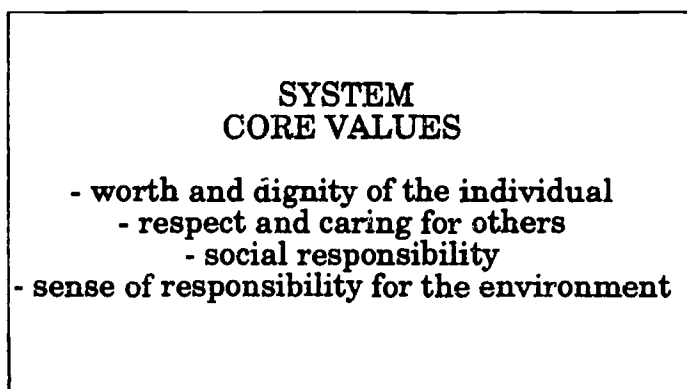
CURRICULUM	BEHAVIOURAL EXPECTATIONS	INTERPERSONAL RELATIONSHIPS	CLASS MANAGEMENT	EXTRA CURRICULAR

RECOMMENDATIONS

1) It is recommended that the school system adopt the values outlined in this report and the suggested educational value categories.

2) It is recommended that a set of values be taught and instilled in all Peel Schools to develop a commitment to the building and maintenance of a "uniquely" Canadian culture that is rests on:

   - social responsibility and respect for human rights
   - respect for cultural/racial differences and universal human dignity
   - equity for all
   - encouragement of self respect, physical and mental health
   - responsibility for environmental quality
   - concern for the well-being, security, property, dignity of others

- commitment to honesty and truthfulness
- commitment to the importance of lifelong learning, teaching and achievement

3) It is recommended that schools ensure that school improvement plans describe, including values and discipline statements, what will be done to teach and demonstrate these values.

4) It is recommended that the value components of existing curricula and programs be stressed.

5) It is recommended that the involvement of all constituent groups; students, staff, and parents be sought in the development of school values and discipline statements.

SCHOOL MANAGEMENT

Legislative Authority

A review of existing legislation suggests that school administrators do possess the requisite authority to maintain a safe and orderly school environment. This authority exists under the Education Act of Ontario and through such legislation as the Young Offenders Act, the Criminal Code of Canada and the Trespass to Property Act.

Board Policies

The Peel Board of Education has in place a well developed set of Operating Procedures and Policies dealing with disciplinary situations. It should be noted that currently, as a result of a recommendation of the Administrative Task Force examining School Discipline and Security grades 7 to O.A.C., the Operations Department is consolidating all administrative directives and documents dealing with school discipline. This process will result in the establishment of protocols for dealing with these types of issues.

Recommendations

1) It is recommended in spite of the fact that the legislated authority of the school and board is considered to be satisfactory, that the following changes to the Young Offenders Act be put forward:

   - That the period of time between the laying of charges and court dispositions be shortened.

   - That when a young offender commits an offence that potentially places students or staff at risk that the police notify the appropriate education official(s).

2) It is recommended that the Peel Board continue to foster a positive working relationship with police forces within the Region of Peel. This should continue to be done at all levels of the organization from senior management through to school administrators.

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3) It is recommended that there should be continued encouragement for the laying of charges under the Trespass to Property Act or Criminal Code of Canada where intruders enter upon school board buildings and property.

BEHAVIOURAL SERVICES/PROGRAMS

Research indicates that the number of students experiencing behavioural difficulties in the system has increased at a rapid pace over the past ten years. During this period the service delivery base has not been adequately adjusted to reflect the actual growth in numbers of students experiencing difficulties. Not only are there more of these students but the severity and complexity of the problems experienced are also increasing. It would also appear that behavioural problems are being manifested at an earlier point in the students' school li:es. The reason for these increases seem to be societal in nature for the most part. As a result of these increased demands there appears to have been a shift in service delivery from an approach focused upon proactive prevention to one of reactive containment.

Recommendations

It is recommended that behavioural services be expanded to improve the level of resourcing and +n shift the focus to early intervention.

It is recommended that the board work with other levels of government to encourage improvement of community services and treatment capability beyond the school system.

ATTENDANCE ISSUES

Compliance with legislation pertaining to compulsory education for students under sixteen years of age, coupled with parental expectations around the reporting of attendance, involves a substantial commitment on the part of the system. Social work personnel devote a large percentage of their time to issues of attendance as do school administrators. It should be noted that chronic non-attendance cannot be viewed in isolation but should be viewed as symptomatic of other underlying problems. Changes in Ministry of Education Registers pertaining to the tracking of students beyond compulsory school age increases demands on already finite resources and results in a reduction of service levels to other needs from these resources. The Education Act is clear on parental responsibility for ensuring the attendance of children of compulsory school age and states consequences for non-compliance. In spite of the Education Act some parents are unable or unwilling to assume responsibility for their children's attendance at school. In these instances involvement of social work staff and school personnel is extensive. The school system often assumes a greatly expanded role in an attempt to ensure a positive outcome for the student. It should be noted that, when it has become necessary for the matters to be referred to the courts, the response from the Family Court Judges has been overwhelmingly supportive.

With respect to students beyond the compulsory school age, often times parental expectations are that the school system continue to monitor and report school attendance. Research clearly indicates that the earlier the intervention the better the prognosis for improved school attendance. Efforts spent on tracking and addressing older students beyond compulsory school age may be a poor utilization of scarce resources. It therefore may be necessary to clarify the educational mandate with respect to this population and this particular problem.

Recommendations

It is recommended that the system use current resources for earlier intervention for students of compulsory school age and shift the burden of responsibility for attendance for older students more directly to parents and students by reinforcing that absenteeism has direct educational consequences.

It is recommended that elementary guidance programs and services be enhanced to support early intervention.

It is recommended that the school system should continue to lobby the Ministry of Education for Legislative revisions in the area of habitual absence. Especially in the area of provision of more varied dispositions.

STAFF DEVELOPMENT

There is currently a wide range of activities in place for Professional Development and training for staff in the areas of behaviour management and the teaching of values. The primary focus of staff development initiatives should be on classroom and in-school strategies designed to anticipate and avoid behavioural problems rather than simply responding to them after they have occurred.

Recommendation

It is recommended that programs continue or expand in the area of staff development that train people to manage student behaviour and create more positive school climate including the following:

1) A school-wide focus on an appropriate learning environment and a positive school climate or tone.

2) Classroom management principles, including general classroom management skills and specific management techniques.

3) Specific behaviour change techniques including behaviour modification and social skills instruction.

4) Student/student relationships including co-operative learning, peer helpers, conflict resolution, and Social Skills groups.

5) Teacher/student relationships including enhancement of student motivation to learn and effective active instruction in a democratic classroom.

6) Teacher/parent relationships including effective communication.

7) Specialized student needs such as separation and divorce groups, social skills groups, communication problem solving, leadership training, and crisis response.

8) Specialized teacher needs including stress management, behavioural strategies and planning for behavioural programs, and crisis response.

9) Specialized needs of consultative staff working with classroom teachers.

THE PEEL BOARD OF EDUCATION

SCHOOL PROGRAMS ACTION TEAM FINAL REPORT

Prepared and Submitted by: John Amon, Special Units
John Beaton, Brampton Reg. Ed. Centre (Chair)
Lindsey Biro, Lyndwood Field Office
Chris Bridge, Special Services
Judy Clift, Special Services
Carolyn Crosby, Program
Ron Cussons, Lyndwood Field Office
Norm Dodgson, Sec., Port Credit S.S.
Mark Evans, Staff Development
Paul Favaro, Research
Peter Gibson, Gordon Graydon Sr. P.S.
Phyllis Hili, Lyndwood Public School
Joan Habib, Media Services
William Kent, Chair of the Board
Jane Mason, Ellwood Memorial Public School
Debra Mitchell, Floradale Public School
Kim North, Meadowvale Field Office
Jan O'Dacre, Special Services
Lynda Palazzi, Program
Sandy Ransom, Trustee
Allan Smith, Program
David Turner, Clarkson S.S.
Jan Coomber, IndEC North

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EXECUTIVE SUMMARY

Attached is the progress report from the Strategic Planning School Programs Team as requested by The Peel Board of Education in Directions For Renewal, June 26, 1990. The committee has nearly completed the mandate of The Board and presents in this report a framework for curriculum definition, delivery and assessment that "it believes will improve the ability of schools to deliver relevant and high quality programs from JK to OAC levels."

These findings are submitted to the Board for its consideration. Committee members would welcome the opportunity to participate further as individual issues are addressed.

The directions that follow were drafted in the full awareness that current budget restraint may in fact become the norm and require redistribution of resources to optimize the meeting of Board priorities and objectives. However, some areas will require added resources if meaningful results are to be obtained.

The major directional shifts that will be necessary to reduce overload and maintain a high standard of programming are as follows:

Program Definition

- The development of a process to develop curriculum that is skills and values based.
- The development of a Peel Skills curriculum that is articulate, holistic, assessable and useful to our teachers.

Program Delivery

- The annual development of a set of systems program goals and objectives, within a multi-year plan.
- The annual establishment of a plan that will ensure that our resources and activities reflect these goals and objectives in a focussed manner.
- The development of an implementation model that places appropriate levels of resourcing in the central board, the field office and the school.

Program Assessment

- The assignment of the responsibility for assessment to the portfolio of a senior administrator, with appropriate resources to co-ordinate the development and implementation of a more current, coherent set of assessment and evaluation processes for Peel.
- The shift of the principal evaluation focus to a school review and improvement focus.
- The articulation of assessment results to the school community for program improvement.

The foregoing are the major shifts in direction recommended. As well, the report speaks to program definition, delivery and assessment models that can be applied to program issues as they emerge. The criteria identified within these models will serve in the development of specific recommendations for planning and budget deliberations (e.g. Program Implementation Model, Sexual Abuse Prevention programs). Finally, this report has been prepared in consultation with the other strategic planning teams and the organizational renewal team.

STRATEGIC PLANNING

REPORT OF THE SCHOOL PROGRAMS TEAM

BACKGROUND:

In June 1989, The Peel Board of Education approved the establishment of a strategic planning project. On June 26, 1990, the Board approved the strategic planning report, "Directions For Renewal". The report recommended the establishment of six action teams to focus on specific areas. The School Programs Action Team was established to develop a plan to ensure that curriculum review, development and implementation processes are appropriately assessed and to ensure that the quality of instructional programs in schools is a clear focus for all support and supervisory staff.

To that end the School Programs Team met through the fall months in four sub-groups addressing the following tasks.

1. A review of the strategic plan audit material to identify specific program concerns and suggestions.
2. A review of Peel's current methods of delivering programs, from the Ministry of Education to the individual student.
3. A review of current literature related to program design, delivery and assessment in research and other educational jurisdictions.
4. A work plan to address the mandate from the strategic planning report.

The initial findings of the foregoing sub-committees were presented to the whole group in December of 1990 at which time the decision was taken to regroup and focus efforts in the following three areas.

1. Program Definition: What will program look like in the 1990's?
2. Program Delivery: How can we make our current implementation practices more effective and interactive?
3. Program Assessment: How can we assure ourselves and the public that we are meeting our program objectives?

The restructured sub-committees met separately through the winter and spring bi-weekly and as a committee of the whole approximately every six weeks. At the same time the chair met periodically with the chairs of the other action teams and representatives from the Organization Renewal Project to ensure appropriate interfaces with the work of the other groups.

INTRODUCTION:

The report that follows is in effect three reports that are so closely related that they form and must become one. The audit material identified our need to define clearly program priorities and implementation strategies without adding to what the school system perceived as overload. In fact, the school system was asking for relief from the current program demands.

At the same time the program team recognizes that economic, social and political measures, as well as student needs, will always contribute to the need to review and revise program. Therefore a framework is suggested for future program design that will provide adaptability without overload. As well, there is a need to tie implementation strategies directly to program design and to create an effective means of assessing program and its implementation at the system, school and student levels.

This report attempts to address the requirements for a program model that would more effectively integrate the elements of design, delivery and assessment. The contributors to this report represent a wide cross section of the educational community who have had access to the input of the broader community from the strategic planning audit. As well, they have attempted to be sensitive to the ever present tension that exists in any organization amongst site, intermediate and central responsibilities. The recommendations in the report recognize the program accomplishments of The Peel Board to date and look forward to meeting the challenges of the next decade.

PROGRAM DEFINITION

The program definition and action framework which follow are a call for system commitment to program renewal. It places teaching and learning at the heart of Peel education.

Implementation of this design will be shaped to

- reduce overload by simplifying
- provide classroom support for student and teacher
- facilitate instructional planning
- provide adaptability and flexibility to respond to change
- develop program not only by adding but by deleting where appropriate

All elements of program will be focussed into a holistic approach that builds a continuum of skills and integrates knowledge into categories that reinforce the development of those skills. It begins and ends with values which are expressed as the behaviours and attitudes that initiate learning and engender success.

I. PROGRAM DEFINITION

We can be sure that society will **change** in unforseen ways. Therefore, a crucial test of the success of our school programs will be **adaptability** of our graduates. Our task is to develop individuals who will be both equipped and motivated for **lifelong learning** - who will have the **skills, knowledge, attitudes** and **behaviours** to achieve personal success that is characterized by productive employment, concern for others, good citizenship and stewardship of the environment.

It must be recognized that the school program that is delivered is shaped by interdependent factors:

- **Outcomes** are descriptions of what we expect students to derive from their school experiences - the **skills, attitudes** and **behaviours** and **knowledge** that we seek to nurture throug'. the curriculum and school life.

While thir paper defines program in terms of outcomes, it is essential to bear in mind that those objectives will be realized only if the following conditions also apply:

- **School Organization** must reflect and facilitate the objectives of the program. It must provide time for **collaborative planning** and peer **coaching** among staff so that holistic learning experiences are provided. There must be **flexibility** so that skills and knowledge are acquired in ways suited to the developmental stages of each child. Similarly, the organization of the school must support a **variety** of individual, small group and large group activities to develop the appropriate skills, attitudes and behaviours for lifelong learning.

- **Instructional Strategies** must be varied enough to develop a broad array of outcomes and to be responsive to the varied needs and learning styles of students. Processes must be in place to use outcome data to refine and alter the learning experiences of students. Since transmission of information is no longer the primary objective of the program, the teacher must become a **facilitator** of learning experiences and a **model** of life long learning.

- The **needs and readiness of the learners must drive program.** Curriculum and support documents must be adaptable enough to support teachers in the delivery of programs that meet student needs.

PROGRAM OUTCOMES

It is critical to the success of school programs that we develop a description of program that is:

- **realistic,** taking into account the **constraints** of time, budget and expectations as well as the **opportunities** that are unique to this time and place;

- **consistent,** characterized by a description of outcomes that is **applicable to all grade levels** and expressed in a **vocabulary that is clearly understood** by all **teachers** in the system;

- **productive of change** in both **perceptions** of what schools should be doing and the **practices** we employ.

VALUES, BEHAVIOUR AND ATTITUDES

In the first instance, behaviour and attitudes determine the ability of students to learn; ultimately, they effect the ability of students to succeed in life. Therefore, behaviour and attitudes are of paramount importance in the school program.

The examination of values, attitudes and behaviours may be a clearly identified part of the instructional program. However, the greatest influences on their development are likely to be the teaching strategies employed, the learning environment and the behaviour modelled by the teacher.

Among the behaviours and attitudes that we must cultivate are the following:

- self esteem
- desire to learn
- hard work
- initiative
- perseverence
- risk taking
- adaptability
- honesty.
- responsibility
- openness to new ideas
- respect for others, sense of equity with others
- concern and care for the environment
- co-operation
- justice
- peace
- economy
- efficiency
- precision
- generosity
- independence
- aesthetic appreciation

KNOWLEDGE

Knowledge is both a **framework for understanding** and a **vehicle for developing skills**. Each generation of students needs to make sense of the world around them and to appreciate their connectedness with those who have come before. At the same time, they need to pursue their own inquiries, discovering information for themselves and adding to the store of human knowledge. The school program must present knowledge to students as something dynamic, as a means to furthering their own individual development and the progress of our society and our world.

We cannot expect succeeding generations to rediscover everything for themselves. At the same time, it is no longer possible to transmit more than a small portion of what is known. Therefore, schools are faced with the critical choice of which kinds of knowledge to pass on. If our goal is to produce individuals who have enough information to make sense of their world, **relevance** becomes one of the tests of what we judge to be worth passing on; if lifelong learning is a goal, the **necessity** of information for further learning becomes another essential criterion.

The following interlocking categories of information could form a knowledge base that fulfills the above functions. It should also be noted that development of language and logical thinking patterns, examination of values and aesthetic appreciation will be addressed throughout the knowledge categories listed below.

- **Knowledge of the natural environment and our place in it** - geography, ecology, all forms of scientific inquiry, mathematical descriptions of relationships and phenomena.

- **Knowledge of the human record** as it is found in written, oral, electronic, visual forms and in performance, encompassing all forms of artistic expression and history.

- **Knowledge of institutions** - understanding the rules and dynamics of human organizations: the family, schools, community groups, law, government, economics.

- **Knowledge of self and others** - an understanding of human personality and the dynamics of human relationships; an appreciation of various cultures; insight into one's own attributes and behaviour.

- **Knowledge of ways of gaining and applying information** - an understanding of various methods by which we obtain and use information; a sense of when to use a particular methodology.

While all of the above categories overlap with parts of the curriculum as it has evolved to this time, it does not follow that all parts of the existing curriculum would be included into the school program suggested by the above scheme.

All the above categories of knowledge can be taught directly; i.e., curricular objectives will relate directly to such knowledge. But some of them, particularly the last four, will also develop as a set of insights that are byproducts of how information is learned. To achieve the latter, it is essential that schools provide students with experiential learning.

SKILLS

Skills are not learned in isolation. Subject matter often determines which skills are needed and so acts as a vehicle for skills development. Also, from an early age, skills are used in varying combinations with other skills. These **integrated skills** are the basis of a wide variety of learning strategies:

- **Inquiry Strategies** such as resource-based research, correlational studies, controlled scientific experiments, surveys, questionnaires and interviews;

- **Problem-Solving Strategies** such as technological applications, mathematical problem solving, and the various forms of creative problem-solving;

- Decision - Making
- learning through **Talk**;
- the **Reading Process**;
- the **Writing Process**;
- **Creative Expression** of all kinds; and
- **Metacognition**

There is no universally agreed-upon classification of the above integrated skills. They vary greatly according to application and elements of one are often found in another. However, all the above learning strategies rest on a foundation of **basic skills** which must be developed to support the more elaborate strategies. One of the fundamental features of this program definition is its stress on the development and reinforcement of the basic skills upon which more elaborate learning activities depend.

All learning strategies involve the **gathering** of information, **processing** of that information, and **expressing** of that learning. We propose a practical classification of basic skills into those categories so that teachers can monitor them, at all grade levels, to insure that students possess a sufficient repertoire within each of these skills categories to participate in meaningful learning activities. As basic skills increase in variety, fluency, and mastery, students will be able to employ them in increasingly sophisticated combinations.

Whenever possible, appropriate technologies will be used to gather information or express learning.

Gathering Information

- by reading
- by listening
- by viewing various media
- by recognizing numbers, arrays of numbers, symbols and shapes
- by counting and measuring
- by observing using all the senses

Processing Information

- recall
- application
- analysis   (i.e., reducing the complex to simpler components; includes classification, seriation, recognition of patterns, comparison)
- synthesis   (i.e., recombining components into more complex entities; includes predicting, hypothesizing, designing)
- evaluation   (i.e., making judgements, critical thinking, estimation, aesthetic appreciation)

Expressing Learning

- by speaking
- by writing
- by drawing, painting, and other visual representations
- by role-playing
- by singing, playing instruments and dancing
- by athletic activity
- by displaying calculations, recording numerical data, and graphing
- by planning and leadership
- by manipulating concrete materials, using tools
- by creating tools, apparatus, structures of various types

II   FRAMEWORK FOR ACTION:

1. Outline a process for the development of a skills continuum that is correlated to the developmental stages of children. This will entail input from the system as to skills continua already in place and/or under development; a co-ordination of existing work, modifying and expanding where necessary, sharing it with those involved for response and refinement.

2. Develop a Peel Skills Continuum, based on the above learning, that will:

   - identify generic skills;
   - identify subject specific skills within generic categories;
   - relate skills to the developmental stages of children;
   - be stated in forms that permit assessment and evaluation.

   The skills continuum will be assessed to ensure that outcomes are being achieved.

3. Develop a matrix to compare existing curricula with the interlocking categories of knowledge and values (behaviours and attitudes) described in the Program Definition to:

   - ensure that opportunities for appropriate skills development are actually present in current units and delete those programs and/or units that are no longer appropriate or relevant;

   - analyze the knowledge basis of current curricula to determine areas where values and skills can be taught and reinforced;

   - re-group units in the current curriculum among the interlocking categories of information so individual units can be readily accessed by individual teachers according to the skills, knowledge and values they want to teach for an individual child or class. This will also enable units to be deleted, revised and added to ensure that the matrix remains viable for future change without contributing to overload.

4. Develop a system-wide plan, supported by a handbook of instructional design and appropriate resources, to train staff at all levels to:

- understand and use:
  - the program definition
  - the skills continuum
  - the processes necessary to deliver, modify, assess and review the holistic learning identified by the program definition;

- understand and use the assessment and evaluation strategies required to monitor learning outcomes;

- understand what needs to be done for all ages and stages of students in terms of the skills continuum;

- access electronically and in print the units available to address the skills, knowledge and values of the interlocking categories of information;

- ensure that student learning is ongoing.

5. Develop a Communications Plan

- Internally - to bring a focus to the process of program renewal and direction for all staff so that they will be able to understand and support;

- Externally - for parents and community to ensure their understanding and support for program renewal.

PROGRAM DELIVERY

BACKGROUND

The overriding issue reflected in the Strategic Planning audit as it related to program issues was that of overload. Issues included:

- the volume and frequency of program initiatives
- numerous addenda to existing curricula
- the number of pervasive pedagogical issues introduced such as active learning, partners-in-action and a whole language emphasis
- the increasing introduction of new technologies
- an increasing agenda of social and community issues
- the lack of time for teachers to plan and implement
- the ongoing need for teacher training/re-training
- insufficient in-service and staff development
- the unavailability of resource staff and the ambiguity of their role

OVERLOAD AS AN ISSUE

The issue of overload should be addressed through a planning process that results in an annual set of system goals that are viewed in the context of a multi-year plan. These goals should then result in field office, school and classroom objectives related to specific program implementation and instructional initiatives. They should be protected from the subsequent intrusion of new conflicting priorities to the fullest extent possible.

Once established, there is a need to co-ordinate all of our resources and activities to support these objectives. Such co-ordination would direct scarce resources to support identified objectives, bring sharper focus to our ongoing staff development and result in the establishment of a clear set of priorities. Examples of the co-ordination required would include:

1. **Scheduling and Co-ordination of Professional Development Days.**

   The number of regional days should be reduced from two to one for the secondary panel to conform to the elementary calendar. The regional day should reflect the present broad based CHOICES format while the second day should be organized at a Superintendency level, be instructional and curriculum based and the calendar date should be different for each superintendency to maximise the use of support staff in supporting program implementation. The activities offered as part of the superintendency day would reflect the annual program objectives and priorities established as part of the planning process and all teachers would be expected to participate.

2. **Staff Development Opportunities**

   The variety and range of staff development opportunities offered annually in a variety of formats should also support the annual priorities and objectives as noted above.

3. **Short Term Professional Development Leave**

   In granting S.T.P.D.L. applications, preference should be given to activities that reinforce and support established objectives.

4. **Department Co-ordination**

   The Program, Special Services and Staff Development/Instruction Departments must work more closely in concert with one another in developing, introducing and supporting new initiatives in a planned manner. This requires joint planning, clarification of roles and an in depth review of the inter-relationships among these departments particularly as it relates to Program and Staff Development/Instruction. This issue may be resolved by the Human Resources:Staff Development Strategic Planning Team.

5. **Program Implementation Resource Teachers**

The assignment of program resource teachers and consultants should be closely related to the priorities and objectives for a given year. When selected to support an initiative that is completed over one or two years, the resource teacher term of office should also be one or two years.

6. **Scheduling of Planning Time**

Principals should make every effort to schedule planning time in such a way as to provide opportunities for teachers to collaborate and interact as they plan program implementation.

7. **Secondary School Positions of Responsibility.**

Significant increases in the number of teachers with positions of responsibility and significant increases in release time for such positions requires that individuals in these roles receive extensive in-service related to role expectations associated with program implementation and the improvement of instruction. In particular, the interrelationships among the Position Of Responsibility positions and the Co-ordinators and senior elementary schools must be addressed. All constituent groups (principals, teachers, Staff Development, Program and Special Services) should have input into the development of such in-service.

8. **Role Clarification**

Peel's current Review, Implementation and Development manual articulates the RDI Model in use but is dated and lacks clarity of roles particularly in the context of the new secondary P.O.R. and reductions in program support staff. This manual should be rewritten with greater emphasis on the role of site based personnel and the role schools should play particularly in the areas of program implementation and assessment. There is also a need to clarify the interrelationships among all support staff: PIRTS, SERTS, Psychology, Speech/Language and Social Work staff.

THE RDI MODEL AND PROGRAM SUPPORT STAFF

The current RDI (Review, Development, Implementation) model has several strengths. Regional subject co-ordinators liaise with the Ministry, oversee curriculum development and train and support field office support staff and secondary school department heads.

The "tenured" nature of the Co-ordinator positions allows for long range planning and stability while building upon established networks with the Ministry and other boards of education. The term positions of resource teachers and consultants provides the flexibility to rapidly shift priorities to support new initiatives. Incumbents have a high degree of credibility with classroom teachers because of their recent classroom experience. An added benefit to the system is the leadership development and growth opportunities provided to many staff who often go on to become principals who provide instructional leadership to schools for years to come.

Program Implementation Resource Teachers support program implementation and teacher effectiveness through the delivery of in-service activities, classroom demonstrations and supportive consultations/visitations to teachers. An emerging role for resource teachers is to assist the Principal in creating and supporting collaboration among teachers as a community of learners. They are also the primary presenters on professional development days and present at Institutes as well as to Retraining and Recertification clinics. PIRTS work primarily in the elementary panel with the program support role being assumed at the secondary level by department heads and others in positions of responsibility. No comparable Positions Of Responsibility or other site based resource is currently in place in the elementary panel.

WHAT THE RESEARCH SAYS

Research indicates that effective schools are characterized by collaborative planning among teachers, provision of instructional leadership by the principal and a clear sense of purpose among all in-school personnel. Similarly, implementation theory clearly states that for change to occur, teachers must have the opportunity to interact with one another on an ongoing basis. Every teacher must have the opportunity to work out the meaning of implementation in practice, reflect on the outcomes and discuss the process with peers. Change in an educational setting involves many people working towards a common goal.

Adult learning theory indicates that adults need to be involved in the identification of their needs, in planning the activities in which they are to be involved and in the evaluation of the end result. They learn best from their peers, need time to talk about and process ideas and require time and follow-up support if successful implementation is to occur.

THE NEED FOR SITE BASED SUPPORT

These principles suggest the need for some level of site based implementation support for elementary schools. The Strategic Planning: School Success Action Team also suggests that there is strong support for school-based staff development focused on identified needs within the school with appropriate resources provided. Such resources might include release time, teacher allocations, clerical support and a staff development allowance for each school. However, regardless of the need for some site based resource we cannot abandon entirely either the regional or field office resource. There is a continued need for regional planning, program development and assessment and review. Similarly, superintendents will continue to rely on a complement of support staff working from the field office to assist schools in specialty program areas and to provide generalist support as required.

FUTURE DIRECTIONS:

With this in mind the current model for program delivery should be modified to provide for an appropriate level of site based resource while maintaining the necessary regional and field office direction and support. Ideally such a model would introduce the following elements:

a) **Teacher Allocation to Each School**

A teacher allocation would provide scheduled release time for one, two or more teachers to provide for in-school planning, co-ordination, program implementation in-service and teacher support. Such program support teachers should be chosen annually on an ad hoc basis based on the program implementation priorities for a given year. These allocations might go directly to a school or be allocated through the Field Superintendent on a priority basis as part of an annual implementation plan.

b) **In-School Release Time**

Release time would support program implementation by permitting teachers to participate in workshops, attend Institutes, coach peers, participate in family based in-service or to visit other schools to observe programs related to the schools annual implementation plan. Again, schools might receive an allocation of days by formula or alternatively these days might be part of a Superintendency pool to be distributed to schools on a needs basis predicated on an overall field office plan.

c) **School Staff Development Allowance**

A budget to support program implementation would be provided either to each school by formula or through the Superintendent on a needs basis. This allowance would support implementation workshops and related activities either for a school or a cluster of schools.

d) **Program Implementation Support Team**

A program implementation and support team should be established in each school consisting of the principal (vice-principal), teacher librarian and designated support teacher(s). A representative of each school team should be part of a Superintendency planning team that establishes program implementation and staff development priorities each year within the context of the regional goals and objectives.

e) **Clerical Support**

Additional clerical support would be required to provide secretarial assistance to the office and teacher librarian to compensate for the additional tasks assumed by the school as a result of activities generated by a more site based model.

FRAMEWORK FOR ACTION

1. Initiate a regional planning process that results in an annual set of system goals and objectives that are viewed in the context of a multi-year plan.

2. Establish a process that ensures that our resources and activities support and reflect these goals and objectives in a co-ordinated manner.

3. Clarify the role of all personnel as it relates to program implementation and delivery in the context of the changes in the RDI model recommended in this report.

4. Provide appropriate in-service for teachers assuming secondary P.O.R. positions particularly related to expectations concerning program implementation, program supervision and peer support.

5. Modify the current model for program implementation and delivery to provide an appropriate level of elementary site based support based on the principles articulated in this report.

6. Establish a process that ensures that planning for school and Field Office staff development and program implementation are coordinated.

PROGRAM ASSESSMENT

Assessment activities support the design and delivery of effective programs and services to students, monitor student learning outcomes, and provide information for statements of accountability.

Peel is committed to high levels of student achievement resulting from quality school programs. A continuous emphasis on improvement must recognize that assessment is an integral part of the teaching-learning process.

The focus for assessment of programs and services, at both the system and the school levels, is to create the learning environments in which all students are able to achieve success.

Without systematic and comprehensive assessment and evaluation processes, decisions regarding the programs and services delivered to students cannot be made objectively and with confidence. Effective assessment and evaluation practices must be incorporated into strategic and operational planning processes at the system and school levels.

Because assessment and evaluation activities describe our levels of performance and effectiveness, and provide the basis for change and improvement, they are the key component in creating an education system which provides a high quality education program for all students.

ASSESSMENT is the systematic process of gathering, recording and analyzing data about programs, services and student performance.

EVALUATION is the application of judgement to the data gathered through assessment in order to place a value on performance or effectiveness.

Assessment activities must conform to the following criteria:
1. Assessment is ongoing, interactive, and related to objectives, standards or other criteria;
2. Assessment leads to change (improvement) and/or statements of effectiveness (accountability);
3. Assessment involves the collection of a wide range of quantitative and qualitative data which meet the criteria for reliability and validity;
4. Assessment involves the stakeholders as participants;
5. Assessment results are appropriately reported.

The next three sections of this report describe three levels of assessment: System, School, Student, and provide a Framework For Action at each level.

The fourth and last section of this report is an Assessment Framework chart which gives an overview of possible purposes, areas, processes and instruments, participants, and reports of assessment activities within the Peel school system.

ASSESSMENT AT THE SYSTEM LEVEL

The purpose of system assessment is to provide information to assist in improving the quality of educational programs and services and reporting on the achievement of system goals and objectives. System assessment provides information about the system's current functioning, suggests whether progress is being made, and identifies potential problems. While system-wide assessments cannot describe an educational system completely, they provide a description of existing conditions which can be used in planning, policy development and decision-making.

System-wide assessment is essential for monitoring the status of the goals established by the educational system and assessing their achievement. Administrators and policy makers need performance-based data to improve the programs and services delivered to students. It is important to use multiple measures to describe the complexity of education. Assessment over time using many measures will provide a comprehensive picture of performance and effectiveness. Information available through documentation, student assessment of learning outcomes, surveys, interviews, questionnaires and observation, can describe the effectiveness and efficiency of the educational system. Since there are multiple users of this information, it is also necessary to determine what type of information the different audiences require and to tailor information reports to their specific needs.

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FRAMEWORK FOR ACTION

1. Develop and implement a process, involving stakeholder groups, to articulate system goals and objectives which are based on system values and visions.

2. Develop a system assessment and evaluation model which includes these components:

    *   process for establishing system objectives, programs and services to be assessed;
    *   identified standards of achievement;
    *   participation of stakeholders groups in the process;
    *   ongoing collection of a wide variety of data;
    *   inclusion of student learning outcomes where appropriate;
    *   regular reporting of results at appropriate levels;
    *   participation in provincial, national and international assessments of program effectiveness and student performance;
    *   resource centre of norm-referenced and criteron-referenced instruments for assessing program effectiveness and student performance;
    *   use of norm-referenced standardized tests which reflect system curriculum;
    *   staff development to increase assessment skills of educators;
    *   incorporates current program review and cyclic review processes;
    *   maintains longitudinal data on educational indicators such as student achievement, student demographics, retention rates, course selections, and expenditures.

3. Assign the responsibility for system and school assessment to the portfolio of a senior board official, with appropriate resources to co-ordinate the development and implementation of an assessment and evaluation model for Peel.

ASSESSMENT AT THE SCHOOL LEVEL

School assessment is an ongoing process to ensure that high quality programs and services are delivered to students. The purposes of school assessment are to facilitate exemplary programs and practices, support program modification and instructional improvement, and provide information for changes to increase the learning outcomes achieved by the students. Each school develops a school improvement plan, incorporating system and school objectives which is designed to meet identified needs.

Assessment at the school level is carried out through a school review process which includes such areas as school leadership, school objectives in the school improvement plan, indicators of an effective school, levels of student learning outcomes and perceptions of staff, students and parents. Principals, teachers, resource staff, students, parents and supervisory officers participate in this process. The results of a school review are shared in appropriate ways with the participants for the purposes of reporting and the improvement of the programs and services provided to students.

FRAMEWORK FOR ACTION

1. Establish a school improvement model for implementation in each school which includes the following components:

   * incorporates system and school objectives;
   * involves school staff in consultation with resource staff and Superintendent of Schools;
   * uses the indicators of an effective school;
   * describes improvement in terms of student learning outcomes;
   * involves the participation of students and parents in appropriate ways;
   * establishes criteria for success as part of improvement plan;
   * plans strategies to achieve the objectives contained in the improvement plan;
   * involves external resource staff;
   * focuses staff development resources on achievement of the improvement plan;
   * uses professional activity days for activities related to the improvement plan.

2. Establish a school review model for implementation in each school which includes the following components:

   * assessment of system and school objectives as established in the school improvement plan;
   * ongoing collection and analysis of a wide range of data, including student learning outcomes where appropriate;
   * participation of staff, parents and students;
   * involvement of external resource staff and supervisory staff;
   * appropriate use of results for program and instructional improvement and community reporting;
   * realistic timeframes to maximize effective use of process;
   * use of professional activity days for activities related to school review.

3. Modify the principal evaluation process to include a focus on leadership related to the school improvement plan and include principal evaluation as a major component of the school review process.

4. Modify the teacher evaluation process to include a focus on contribution to the school improvement plan in addition to other components of teacher performance.

ASSESSMENT AT THE STUDENT LEVEL

Student assessment provides information on the achievement of the learning outcomes which we expect students to derive from their school experiences. Assessment is a participatory process involving teachers, students and parents which develops a recognition of individual strengths and defines an understanding of excellence.

Student assessment requires multi-disciplinary approaches based on the instructional program and an understanding of child development. Assessment is linked to learning outcomes, and emphasizes growth as well as accountability. Ongoing assessment of knowledge, skills and attitudes achieved by each student creates the information base for a successful educational experience for each student.

FRAMEWORK FOR ACTION

1. Develop a model for student assessment which includes the following components:
    *   ensures that assessments are free of cultural, gender and linguistic bias;
    *   recognizes both the processes in which students engage as well as final products;
    *   ensures that assessments are primarily concerned with enabling the learner;
    *   requires appropriate strategies for assessment of knowledge, skills and attitudes in light of age expectations;
    *   establishes standards for evaluating learner outcomes;
    *   reflects program design;
    *   reflects consistency with effective instructional strategies;
    *   establishes a common vocabulary by defining terms such as 'mastery', 'standards', and 'benchmarks';
    *   provides appropriate peer-evaluation and self-evaluation opportunities;
    *   incorporates a wide variety of informal and formal techniques and instruments to assess student performance;
    *   systematically collects data on achievement as well as samples of performance as part of an ongoing profile for use by educators, parents and students;
    *   ensures appropriate modifications for students with special needs;
    *   establishes criteria for retention and acceleration;
    *   provides support for teachers to make informed instructional decisions, set learning goals and shape curricula based on the strengths and needs of the learner;
    *   ensures that schools develop report card formats which describe learner outcomes in terms of the knowledge, skills and behaviours identified in the program design;
    *   combine interviews, conferences and report cards to provide a maximum amount of information on student performance and increased opportunities for parent understanding of the teaching-learning process;
    *   provides a handbook on assessment and evaluation for teachers;
    *   provides staff development opportunities for teachers on effective student assessment and evaluation practices.

ASSESSMENT FRAMEWORK

LEVELS	PURPOSES/USES	AREAS FOR ASSESSMENT	EXAMPLES OF PROCESSES AND INSTRUMENTS	PARTICIPANTS IN DEVELOPING/CARRYING OUT ASSESSMENTS	EXAMPLES OF REPORTS
SYSTEM	o public accountability o policy decisions o resource allocation o staff development o program design and delivery o recognition of exemplary programs and practices o organizational improvement	o system values and visions o system initiatives o system policies o system curriculum design o system program implementation o system program outcomes o system resource services	o Ontario Assessment Instrument Pool (OAIP) o surveys (staff/students/parents) o research studies o program reviews o policy reviews o provincial reviews o norm-referenced tests o criterion-referenced tests o educational indicators o provincial, national, international assessments	o supervisory officers o principals and vice principals o resource staff o research staff o teachers o members of the community o students	o annual report to board o public report card o reports to educators o report to Director's Council
SCHOOL	o program modification o instructional improvement o improvement in practices and procedures o organizational improvement o resource decisions o recognition of exemplary programs and practices o reporting	o school objectives o school environment o school management o school programs o school practices and procedures	o school review o teacher evaluation o instructional strategies o program planning analysis o Ontario Assessment Instrument Pool (OAIP) o surveys (staff, students, parents) o positions of responsibility evaluation	o principals and vice principals (including other schools) o teachers o resource staff o supervisory officers o parents o students o research staff	o report to Superintendent of Schools o report to staff o report to school community

LEVELS	PURPOSES/USES	AREAS FOR ASSESSMENT	EXAMPLES OF PROCESSES AND INSTRUMENTS	PARTICIPANTS IN DEVELOPING/CARRYING OUT ASSESSMENTS	EXAMPLES OF REPORTS
STUDENT	o program planning o program modification o achievement (outcomes) o reporting to parents and students	o student skills o student knowledge o student behaviours	o observation scales o portfolios o system assessments o anecdotal comments o self-evaluation and peer-evaluation instruments o performance assessments other than tests) o teacher-made tests o criterion-referenced tests o norm-referenced tests o learner profile o Benchmarks (Ministry of Education)	o principal and vice-principal(s) o teachers o resource staff o In-School Review Committee o Identification, Placement and Review Committee o students o parents	o Early Identification Plan (EIP) o Individual Education Plan (IEP) o report cards o parent-teacher interviews and conferences o Ontario School Record (profile)

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THE PEEL BOARD OF EDUCATION

SCHOOL SUCCESS ACTION TEAM FINAL REPORT

Prepared and Submitted by: James Alsop, C.U.P.E. Local 2544
John Berges, Planning Department
Sandra Birthelmer, Meadowvale Field Office
Doug Brown, Research & Development
Cathrine Campbell, Trustee
Cam Davidson, Gordon Graydon S.S.
Ed Daniszewski, Special Services Dept.
Lyle Decaire, Plant Dept.
Diane Grieve, Special Services Dept.
John Hunter, Glenforest S.S.
Drew Leverette, J. A. Turner S.S.
Jacquie MacInnes, Program Dept.
Debra McFadden, Negotiations Dept.
Marolyn Morrison, Trustee
Marilyn Pelletier, Media Services Dept.
Carolyn Rumley, Lorne Park S.S. (Chair)
Elaine Saville, Cherry Hill P.S.
Florence Tomchishen, C.U.P.E. Lcoal 1628
Glen Whaley, Finance Dept.
Bob Willis, Purchasing Dept.
Doug Wilson, Homelands Sr. P.S.

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FINAL REPORT OF THE SCHOOL SUCCESS ACTION TEAM

Background:

In June of 1990 the Peel Board approved the strategic planning report "Directions for Renewal". The report recommended the establishment of six teams to implement the findings of the audit report. It was further recommended that one of the action teams should be a system representative team to develop a plan to shift authorities, resources and accountability towards greater site-based management with a focus on school success.

The school success action team first met on September 19, 1990. Following the initial meeting the action team divided into two sub-groups to review the audit material and research as it pertained to (a) school effectiveness and (b) site-based management. A summary of their findings are included in this report.

The action team reconvened as a committee of the whole to begin the process of developing a set of indicators that could be used to assess schools and prepare school improvement plans. The committee met on a regular basis throughout the winter and spring months. At the same time the work of the other action teams and the Organizational Renewal Project was monitored.

Introduction:

This report is based on the work of the School Success Action Team as they set about answering the following questions:

1. What does the literature and research have to say about (a) School Effectiveness and (b) Site-Based Management?

2. What are the outcomes of successful schools in Peel and what are the factors that contribute to the outcomes?

3. What recommendations could be made to more effectively enable the schools to successfully achieve the outcomes?

The process that followed was one of synthesizing the available data with reference to the size of the system, the problems of funding, the need for communications and the changing demographics of Peel's communities.

As the work progressed it was noted that there was considerable overlap with the work that was being conducted by the other action teams and the Organizational Renewal Project.

1A. SUMMARY OF THE RESEARCH ON SCHOOL EFFECTIVENESS

A review of the literature on effective schools highlights a number of common elements. Schools are deemed to be successful when the following factors (not necessarily in priority order) exist:

1.1 There is purposeful leadership from the principal.

"The principal's role has been identified as having four differing foci: an administration or plan management program focus; and a student development focus". (Leithwood and Montgomery, 1986). "The latter two patterns appear to be effective in improving the school's contribution to student outcomes." (Leithwood 1990)

1.2 There is an emphasis on learning and teaching skills

A school consciously and overtly examines all activities and procedures to ensure that these contribute to the "mission" of the school. The emphasis on how people learn leads staffs into discussions of teaching/learning strategies and related professional development. (N.S.D.C. 1989)

1.3 There is a positive and comfortable environment.

"People work and behave better when they are well looked after and feel that those in charge understand and respond to their personal needs". (Rutter, Maughan, Mortimore Ousten, 1979)

1.4 The teachers are involved in decision making.

A great deal has been written about teacher empowerment. Maeroff 1989 describes the three guiding principles of teacher empowerment as having to do with status, knowledge and access to decision making. An American administrative publication emphasizes teacher improvement. "Certainly one of the most important advantages of this process is its' ability to take full advantage of the expertise of all staff.

In this way, teachers are both empowered and enabled. They are empowered through shared decision-making and they are enabled becau.. e the decisions are more likely to support what they are trying to do in the classroom". (A.A.S.A., NAESP, NASSP 1989)

1.5 Students actively participate in decision-making.

"Success" in the school must include the taking of responsibility for their own learning and the quality of the school. As students participate meaningfully in school decision-making, their progress towards self-directed learning will be enhanced.

1.6 There is parental and community involvement and maximum communication.

Rosenholtz (1989) emphasizes the need for parental involvement. She notes the following, "the extent to which schools actively involve parents in the learning efforts of their children directly affects teachers efficacy".

She also states, "involved parents are likely to focus their childrens' attention on the importance of schooling, lessening the likelihood of student disengagement".

1B. SYNTHESIS OF RESEARCH ON SCHOOL-BASED MANAGEMENT

WHAT IS SCHOOL-BASED MANAGEMENT?

...an organizational and operational model for providing each school with the authority and resources required to implement change and flexibly shape program and service delivery to the community it serves.

A search of the literature on site-based or school-based management identified the following consistent themes:

2.1   There are various degrees of site-based budgeting that align financial resources with instructional goals.

2.2   There is increased input to decisions from those closest to delivery, which in turn boosts staff morale and involvement.

2.3   The possibility is provided for greater creativity in program design.

2.4   The accountability for decisions is focused at the site of service delivery.

2.5   There is increased authority for selecting personnel who are assigned to the school.

2.6   School-site advisory committees with key roles for parents facilitate the process of communication.

The literature also distinguishes between organizational and political site-based management. Organizational site-based management centres administrative control with the staff while political site-based management has the parents being given degrees of decision-making authority (Brown 1990). Studies indicate that parents are usually not interested in school administration unless there is a crisis

Also noted are reasons why implementation of site-based management could be unsuccessful.

- No *clear vision* of what Site-Based Management is
- Lack of Clarity in *goal setting*
- Lack of preparation and *training for change*
- Lack of knowledge and skills in *transition management*
- Lack of effective *planning*
- Insufficient *time* for implementation
- Lack of skill in gaining and maintaining *commitment*
- Lack of *READINESS*
- Lack of *RESTRUCTURING*

2. SUCCESSFUL SCHOOLS: CONTRIBUTING FACTORS AND OUTCOMES

The action team began the process of identifying the indicators of a successful school by examining all of the data acquired through the search of the literature on effective schools and site-based management, along with the information gleaned from the audit. This material was supplemented by input from the team members who are representative of the employee groups from across the Board.

It was determined that the information clustered around three significant outcomes:

1. STUDENT SUCCESS
2. COMMUNITY ACCEPTANCE AND SUPPORT
3. STAFF COMMITMENT

The next stage was the identification of the factors that contribute to the outcomes. They are as follows:

OUTCOMES	CONTRIBUTING FACTORS
1. Student Success	Learning Success - there is cognitive development commensurate with potential. • there is an identified skills continuum • there is clear, consistent measurement of school progress Positive social relationships with peers and adults. Student co-operation/participation/effort Appropriate programming • there is co-ordination of regular and special needs programming
2. Community Acceptance and Support	Proactive public relations Positive student/staff actions and attitudes Receptive School Climate Visibility and accessibility of in-school personnel and trustees A professional, credible, accountable image Fiscal responsibility/accountability Frequent school/community interaction that fosters mutual support e.g. parental, community and outside awareness and involvement
3. Staff Commitment	Participatory management structure A format for continual review and improvement Opportunities for lateral/vertical leadership Staff Development Continual Reinforcement of Values Emphasis on Communication Ability to direct resources to meet objectives

3. DEVELOPING RECOMMENDATIONS

As the outcomes and the contributing factors were identified, each was discussed with reference to the various processes and structures currently in place within the Peel Board. Again it was noted that many of these same areas are currently being investigated by other groups within the system, and that in fact a number of processes are being implemented that will reduce or have the potential to reduce some of the complexities of the current centralized system. (e.g. the Administrative Computing Project, the Financial Information System)

In addition, the Organizational Renewal Project and other action teams have made recommendations that are directly related to the contributing factors. The literature on effective schools and site-based management emphasizes the importance of providing schools with the authority and resources required to implement change and flexibly shape program and service delivery to the community it serves. It has been consistently apparent throughout the discussions that the issue of limited flexibility in budget and staffing at the school level affects the degree to which the school can effectively respond to the unique demands of the site. On these two issues the team was prepared to make the following recommendations.

RECOMMENDATIONS

1. It is recommended that the Peel Board decentralize school intended Central/Field Office budgets to increase the direct to school funding. Any formula used to distribute the funds would include consideration of the following factors: enrolment, program composition, age of the school and equipment.

2.	It is recommended that there be a reduction in the restrictions and categorizations of the funds that come to the schools, thus making the funds generic to be allocated by the school to meet identified objectives.

3.	It is recommended that there be further investigation of the possibility of allowing schools to roll unused funds at the end of the year into the subsequent budget year.

4.	It is recommended that there be a thorough investigation of the feasibility of creating more flexibility in staffing (academic and non-academic) at the school/field office level to allow schools to respond to specific short or long term needs. It is recognized th ৹ there are many contractual issues that would need to be explored and that the needs of elementary and secondary schools are different.

THE PEEL BOARD OF EDUCATION

HUMAN RESOURCES ACTION TEAM FINAL REPORT

Prepared and Submitted by: Iris Armstrong, Staff Development & Instruction
Doug Beffort, Massey St. P.S.
George Carlson, Trustee
Christine Delaney, Human Resources
Don Ducette, CUPE Local 2544
Donna Fleury, Northwood P.S.
Marty Fowler, Negotiations
Neil Gillies, Human Resources
Jim Gollert, Continuing Education
Sandy Gray, Brampton Regional Education Centre
Wayne Hulley, Assoc. Director of Education (Chair)
Paul Jones, The Humberview
Dianne Keough, Eastbourne P.S.
Darcy Kingshott, Central Peel S.S.
Don Lawson, Human Resources
Sylvia Link, Communications
Beverley Moore, Occas. Teachers Assoc. (Elem.)
Debbie Pinkerton, Occas. Teachers Assoc. (Sec.)
Bruce Smith, Hillside Sr. P.S.
Mark Stevens, Central Peel S.S.
Ruth Thompson, Trustee
Dorothy Thomson, Administrative Services
Wayne Turner, Staff Development
Catherine Wilkins, J.A. Turner Prof. Library

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THE PEEL BOARD OF EDUCATION

FINAL REPORT OF THE HUMAN RESOURCES ACTION TEAM

BACKGROUND

At the Regular Meeting of the Board on January 8, 1991, the "Progress Report of the Human Resources Action Team" was received. The report set the direction for the Human Resources Action Team in developing an "Integrated human resources strategy for the Peel Board of Education."

Since January, the Action Team has been meeting in four sub-groups:

-Staff Development and Leadership
-Recruitment and Recognition
-Staff Evaluation
-Working Environment

These four emerged as the most critical in the human resources area over the next five to ten years.

This final report will highlight the work of each sub-group. Each sub-group has made specific recommendations and these recommendations are reported at the end of each section of this report. The Human Resources Action team has created 5 integrated recommendations from the sub-group recommendations, and these appear on the final pages of the report. It is anticipated that the integrated recommendations of the Human Resources Action Team will be considered, with those of the other Action Teams, to produce a comprehensive document "Directions For Renewal".

STAFF DEVELOPMENT AND LEADERSHIP

The purpose of staff development is to move Peel towards being a "Learning Organization" where all employees are life-long learners. People are the board's most important resource. To invest in people through staff development is to invest in the future.

Leadership is seen as one of the main components in the area of staff development. The leaders in the system will create a collaborative working culture in which life-long learning is the focus. The key to change lies within a leader's ability to create a culture that nurtures, encourages and provides opportunities for individuals as learners.

Staff development activities must be available to all Peel Board employees. These activities should lead to improved skills and performance as well as a feeling of personal satisfaction.

A Regional Staff Development Department is necessary to provide leadership, coordination and support to staff development throughout the board. The Regional Staff Development Department must plan and deliver programs to meet corporate needs of the board. These programs should focus on the strategic directions of the board with a major aspect of the activities supporting leadership development and identification. The Regional Staff Development Department needs to continue to be resourced to deliver these programs.

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The Board approved Leadership Centre is a concept that will support this direction. The Peel Leadership Centre is beginning the implementation process during the fall of 1991. A Staff Development Officer has been redeployed as a Staff Leadership Officer within the Staff Development Department and will be developing the centre in available space. As the Centre develops, additional space and staff may be necessary to support the activities. The Peel Leadership Centre will focus on programs to identify, develop and assess leadership and leadership development. The Advisory Committee, representing all levels and components of the Pee' Board, will assist in focusing the activities of the Leadership Centre.

The Regional Staff Development Department must also provide coordination and the management for region-wide activities. These activities include professional activity days, the development of the school year calendar, the information resource centre, and liaison with universities for practice teaching.

The Strategic Planning Process has clearly identified site-based management as a system direction. In the area of staff development, this same concept must be supported. The local school and other board sites and departments are in the best position to determine staff development needs, and to offer programs and activities to meet them. However, the Regional Staff Development Department must provide the focus on system priorities, and support site-based activities by supplying information, assisting with logistics, and supplying expertise when needed.

Site-based staff development activities will require both financial and human resource support at the site, department and field office level. This support will need to be increased over time as the leaders in the system become more aware of their responsibility for ensuring that effective staff development activities are available for all staff. Site-based budgeting and additional staff development staff assigned to field offices will be important in meeting this need.

Recommendation 1

That the Regional Staff Development Department be responsible for the delivery of corporate programs and activities, the management of regional functions, and the support of site-based staff development activities.

Recommendation 2

That staff development should be focused on the individual work sites. Supervisors at these sites should be expected to provide leadership in staff development. Specific resources, in the form of people, money and staff development expertise, should be allocated directly to each Superintendent of Schools and Business Director to invest in the sites under his/her supervision, and to help prepare the most effective staff development program.

RECRUITMENT AND RECOGNITION

The audit, undertaken as part of the Strategic Planning Project, identified recruitment and retention of staff as important issues for the future. The Human Resources Action Team believes that a successful recruitment strategy, combined with a system focus on the importance of the recognition of staff performance, will lead to the development of a committed employee group.

Recruitment activities should focus on attracting individuals who are well qualified and share the vision and values of the Peel Board. Employment disadvantaged groups, including women, members of visible minorities, challenged people and Native people should be encouraged to apply for positions and should see the recruitment process as open and fair. The demographics of the staff should be consistent with those of the community and should provide role models for all students.

Orientation should be seen as an essential and integral part of the recruitment process. All employees should receive a regional as well as site-based orientation to Peel and the workplace.

One of the stated Values of the Peel Board is caring. Caring is exhibited through the "recognition of individual contribution and talent." Regional programs such as the 25 Year Club, the Retirement Dinner and the Award of Excellence program should be continued. Some consideration should be given to expanding the recognition of employees through 1, 5, 10, 15 and 20 year awards. Site-based award programs should be highlighted through effective communications. All sites should be encouraged to celebrate the successes and efforts of employees. Recognition for the successful completion of courses and the contribution to organizations, should also be pursued. Recognition receptions should be held more frequently. These do not have to be costly but should be considered important.

An Employee Suggestion program should be developed. The focus of the program should be continuous improvement. The program should have a high profile and suggestions should be followed up with written or personal contact. The program would focus on the recognition of employees committed to improving the services of the Peel Board.

Recommendation 3

That the recruitment/orientation of staff should be a coordinated effort involving Human Resources, Staff Development and Communication Department staff. The strategies developed should communicate the vision and values of the board with a focus on employment disadvantaged groups including women, members of visible minorities, challenged people and Native people.

Recommendation 4

That the orientation of new employees should be considered an important element in the recruitment strategy. System orientation, as well as orientation to each work site is necessary. The Staff Development Department should supply leadership and resources in the area of system orientation. Leaders at each work site should be expected to provide an orientation program.

Recommendation 5

That the awareness and acceptance of the value of employee suggestion programs, aw- ds and recognition, must be developed amongst leaders in the board. Leaders must realize that these activities will motivate, invigorate, renew and empower all staff, help to identify problems and solutions, and contribute to the achievement of continuous improvement throughout the Board. The Human Resources Department should take responsibility in this area. This department should coordinate present programs and develop a comprehensive new program of staff awards, recognition and employee suggestion program.

STAFF EVALUATION

The evaluation of staff is a key element in a human resources strategy. There are specific evaluation processes in place for all Peel Board employees. The activity of the Action Team has led to the determination that the number of employee groups and the size of the workforce has placed unrealistic demands on supervisory personnel. It has also become clear that many of the processes are simply completed to satisfy administrative demands.

The Human Resources Action Team believes that staff evaluation must focus on continuous improvement rather than on a summary review written on a specific date. This focus on growth and continuous improvement must include the identification of areas of unacceptable performance, and describe processes to address these areas.

An effective evaluation process must balance the commitment of resources utilized in the evaluation process, with the outcomes derived from the evaluation. Principals, superintendents and supervisors under the present processes, devote a great deal of time to evaluation. A more integrated approach to evaluation should be developed. If improvement plans were developed for each work-site, the principal or supervisor could base staff evaluation on the contribution to the realization of the plan. The superintendent could base evaluation on the ability of the individual work-sites and departments in achieving the goals of the plan.

Because the area of evaluation is part of the larger issue of assessment, the Action Team has not made specific recommendations regarding evaluation plans, but rather has referred its findings to the Planning Assessment for School Success Committee.

Recommendation 6

That the Planning Assessment for School Success Committee undertake a review of all staff evaluation procedures and develop an integrated, effective and efficient practice that will lead to continuous improvement of all Peel Board staff.

THE WORKING ENVIRONMENT

The topic of the working environment presents a particular challenge, in that it is difficult to define, and encompasses a wide range of variables. Most employees have an implicit notion of what is not a good workplace, but tend to take for granted those factors which contribute to a good working environment.

In their draft report of March 1, 1991, the Premier's Council on Health, Well-being and Social Justice recognized that healthy people thrive in healthy environments. However, research on the working environment has been unable to establish a clear correlation between job satisfaction, including satisfaction with the work environment, and job performance. While physical working conditions do represent a component of job satisfaction, people tend to de-emphasize the physical environment in making judgements about their jobs until the working environment is perceived negatively. At that point, a poor working environment becomes a "dissatisfier".

In assessing the working environment, the Action Team considered physical and psychological factors as well as the resource support available to employees. Special attention was focussed on those issues raised in the audit, communication (internal and external), physical environment, and staff morale.

The quality of the physical environment cannot be measured in absolute terms because employees will perceive and judge working environment subjectively. Employees are more likely to complain about physical environment if they feel that conditions compare unfavourably to others, or if the poor working conditions appear to be rectifiable. This is particularly pertinent to the Peel Board given the diversity of ages, types and occupancy load of it's buildings.

The psychological factors which contribute to a positive or negative work environment, range from pressures of time and workload to interpersonal relationships, and management techniques. The main concern raised in the audit however, was stress. While the sources of stress may be similar, each individual will have a different level of resistance and a different arsenal of coping mechanisms. It is generally acknowledged that excessive stress can have an impact on an individual's emotional and physical health, but individuals under stress also tend to focus on the source of stress to the exclusion of all other variables. For instance, if an employee feels that he/she is being treated unfairly by the supervisor, excellent physical working conditions will not be seen as a mitigating factor. Conversely, the atmosphere created by a supervisor with excellent management skills offsets a run-down or over-crowded facility.

Another psychological factor which influence an employee's job satisfaction is distractions which divert attention from the individual's primary task. When this distraction exceeds a person's capacity to cope, a sense of overload results. Fatigue, resulting from a poorly designed or maintained workspace can also have a psychological influence on employees.

The presumption of equity is also a factor in assessing the impact of resource support to job satisfaction. An employee who believes that the resources are allocated inequitably according to for instance, status or job category, will rate working environment negatively.

Physical, psychological and equity factors must all be considered in recommending improvements in the working environment, as negatives in one sphere will cancel gains from another. For instance, technological change may require a review of the physical resource allocation in order to be implemented successfully.

Recommendation 7

That the Peel Board of Education adopt the following belief statement regarding the importance of a positive working environment. "The Peel Board of Education is committed to a working environment which is healthy, safe and supportive, free from bias and which enhances staff opportunities to work to their fullest possible potential, and therefore contribute to greater student success."

Recommendation 8

That during regular cyclical reviews of facilities, the Peel Board of Education review all policies and operating procedures to ensure a philosophical concurrence with the positive working environment policy statement in recommendation 7.

Recommendation 9

The Communications Department be supported in pursuing the goals and objectives outlined in its 1990 Status Report "To establish effective two-way communication among all staff members within the board, designed to assist in maintaining a positive and enlightened internal climate".

Recommendation 10

That planned maintenance be considered a priority in the budget process so that inequities across the board may be addressed. The objectives outlined in the report entitled "Plant Maintenance and Capital Improvements" should be used to ensure that system needs are addressed in a uniform and systematic way.

Recommendation 11

That the Human Resources Department develop special stategies for recruiting and accommodating employees in the four designated target groups (women, physically challenged, members of visible minorities and Native people) including such strategies as flextime, on-site day care, job-sharing, and management seminars to help leaders understand the importance of accommodating the physically challenged.

Recommendation 12

That the Peel Board of Education direct the Research Department to undertake a comprehensive study of workplace stress which would determine the sources of stress, as perceived by employees, so that strategies could be developed to address the concerns and demonstrate a commitment to employee health and well-being.

SUMMARY OF RECOMMENDATIONS

1. That the Regional Staff Development Department be responsible for the delivery of corporate programs and activities, the management of regional functions, and the support of site-based staff development activities.

2. That staff development should be focused on the individual work sites. Supervisors at these sites should be expected to provide leadership in staff development. Specific resources, in the form of people, money and staff development expertise, should be allocated directly to each Superintendent of Schools and Business Director to invest in the sites under his/her supervision, and to help prepare the most effective staff development program.

3. That the recruitment/orientation of staff should be a coordinated effort involving Human Resources, Staff Development and Communication Departmental staff. The strategies developed should communicate the vision and values of the board with a focus on disadvantaged groups including women, members of visible minorities, challenged people and Native people.

4. That the orientation of new employees should be considered an important element in the recruitment strategy. System orientation as well as orientation to each work site is necessary. The Staff Development Department should supply leadership an resources in the area of system orientation. Managers at each work site should be expected to provide an orientation program.

5. That the awareness and acceptance of the value of employee suggestion programs, awards and recognition must be developed amongst leaders in the board. Leaders must realize that these activities will motivate, invigorate, renew and empower all staff, help to identify problems and solutions, and contribute to the achievement of continuous improvement throughout the board. The Human Resources Department should take responsibility in this area. This individual should coordinate present programs and develop a comprehensive new program of staff awards, recognition and employee suggestion program.

6. That the Planning Assessment for School Success Committee undertake a review of all staff evaluation procedures and develop an integrated, effective and efficient practice that will lead to continuous improvement of all Peel Board staff.

7. That the Peel Board of Education adopt,and encourage system leaders to support, the following belief statement regarding the importance of a positive working environment. "The Peel Board of Education is committed to a working environment which is healthy, safe and supportive, free from bias and which enhances staff opportunities to work to their fullest possible potential and therefore contribute to greater student success."

8.   That during regular cyclical review of facilities the Peel Board of Education ensure a philosophical concurrence with the positive working environment policy statement in recommendation 7.

9.   That the Communication Department be supported in pursuing the goals and objectives outlined in its 1990 Status Report, "To establish effective two-way communication among all staff members within the board, designed to assist in maintaining a positive ar d enlightened internal climate".

10.   That planned maintenance be considered a priority in the budget process so that perceived inequities across the board may be addressed. The objectives outlined in the report entitled "Plant Maintenance and Capital Improvement" should be used to ensure that sys⁺em needs are addressed in a uniform and systematic way.

11.   That the Human Resources Department develop special stategies for recruiting and accommodating employees in the four designated target groups (women, physically challenged, members of visible minorities and Native people) including such stategies as flexaime, on-site daycare, job-sh⁻ ring and management seminars to help leaders understand the importance of accommodating the physically challenged.

12.   That the Peel Board of Education direct the Research Department to undertake a comprehensive study of workplace stress which would determine the sources of stress, as perceived by employees, so that strategies can be developed tᴏ address the concerns and demonstrate a commitment to employee health and well-being.

THE PEEL BOARD OF EDUCATION

NEW PARTNERSHIPS ACTION TEAM FINAL REPORT

Prepared and Submitted by: R.N. Chalmers, Meadowvale Field Office
Gary Hollo, Continuing Education
Russ Jackson, Caledon Central P.S.
Alex Jupp Trustee
Tom AcAuliffe, Trustee
Dawn McDowell, Communications (Chair)
Doug Paton, Administrative Services
Laurie Pedwell, Central Peel S.S.
Mike Roy, Associate Director of Education/Business
Glen Whaley, Finance
Linda Newnham, Instructional Programs

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CONTENT

This final report contains a summary of the activities and recommendations of the New Partnerships Action Team, including the following:

1. The Task

2. Action Team Members

3. Summary of Recommendations

4. Research—Study of Partnerships in Peel, Ontario and Beyond

5. A Two-Way Commitment—the Benefits of Partnerships

6. Partnership Pitfalls

7. School Based Partnerships

8. Donations

9. A Formal Regional Partnership Structure

10. Conclusion

1. THE TASK - NEW PARTNERSHIP TEAM

DEVELOPING NEW PARTNERSHIPS

The Peel Board of Education Strategic Planning Partnership Action Team was charged with the task of building a plan to develop new, more productive partnerships with our communities, other governments, business and other educational institutions.

According to the Directions for Renewal approved by the Board on June 26, 1991, the teams' responsibilities include:

- identifying the various kinds of partnerships and productive relationships that currently exist and have demonstrated their worth, throughout Ontario and beyond it.

- recommending criteria/processes to govern the development of a wide range of new (or traditional partnerships) that the Board and its staff should consider.

- recommending any specific strategies to develop new or enhanced partnerships, consistent with those criteria, for the 1991 and 1992 budget years.

PARTNERSHIP ACTION TEAM

3. SUMMARY OF RECOMMENDATIONS

The Action Team on Developing New Partnerships offers four major recommendations. The first three recommendations address partnerships within the Peel Board, the fourth recommendation is aimed at a much broader partnership initiative with other educational institutions, government and business in the Peel Region.

I.   Adopt a partnership philosophy for the Peel Board of Education.

II.   Encourage a site-based model for school partnerships with community and service groups.

III.   Encourage individual and corporate donations to the Peel Board of Education.

IV.   Establish a formal regional partnership structure which would bring together education, government and business.

Partnership Definition for The Peel Board of Education

The following is recommended as a working definition for partnerships in the Peel Board of Education:

"A relationship between parties in which ongoing, collaborative activities lead to mutual benefits, tangible or intangible, as defined by the partners."

The Action Team on Developing New Partnerships offers the following recommendations:

I.   ADOPT A PARTNERSHIP PHILOSOPHY FOR THE PEEL BOARD OF EDUCATION

    1.   <u>Encourage Partnerships in Peel</u>

       The Peel Board of Education should encourage and actively pursue new partnerships with business, government, other education and community service agencies. We need and want partners.

    2.   <u>Guided By Our Vision and Values</u>

       The Peel Board's new vision and values statement should serve as a framework for new partnership initiatives.

    3.   <u>Mutual Benefit</u>

       There are many benefits that will come to the Peel Board by strengthening our partnership activities. We want to encourage committed two-way partnerships not "patronage". Building long-term support for the Board will not likely come from a fundraising or donation program. Partnerships need to offer mutual benefit for all parties.

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4. **An Integrated Approach**

Partnerships should be a key part of school and Board initiatives, not an add on but a complement to other activities. Partnerships can not be launched in isolation. Building stronger partnerships should also be integrated into the work of other strategic planning action teams.

5. **Communication**

A complete communications plan needs to be developed as part of any successful partnership initiative. Communications planning needs to address strategies for soliciting new partnership activities and recognition for participants.

6. **Staff Involvement**

In order for schools and departments to actively pursue new partnerships, staff at all levels need to be active participants. Staff development programs should be launched to share strategies for maintaining and starting successful partnerships.

II. ENCOURAGE A SITE BASED MODEL FOR PARTNERSHIPS WITH COMMUNITY AND SERVICE GROUPS

1. **Site-Based Approach to School Partnerships**

The site-based management model is recommended in developing and maintaining individual school partnerships with community and service groups. This means that each school should develop its own plans and liaisons according to what suits the school and local community.

2. **Regional Support**

At a regional level, there should be one department/person responsible for coordinating and supporting school based partnership activities. The coordination would help identify potential community partners and the degree and type of interest these partners would have in school involvement.

It is recommended that a directory or inventory catalogue of service/community group contacts could be compiled and be made available to each school.

The primary purpose for regional support is communications not regulation. Coordination would help avoid duplication of efforts. This would also help open some doors and provide credibility to the local overtures or inquiries.

3. **Partnerships Promoted and Highlighted**

Partnership activities should be highlighted and promoted through Board publications, superintendents' meetings and regional forums.

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4. Resources

    Regional support will require staff and other resources. Since there are partnership efforts already underway in many departments, resources and staff could be reallocated to provide a coordinated regional resource.

III. ENCOURAGE INDIVIDUAL AND CORPORATE DONATIONS TO THE PEEL BOARD OF EDUCATION

1. Encourage Donations

    The Peel Board of Education encourages individuals and corporations to participate in the activities of the Board through sponsorships and donations of time, service, goods and financial gifts.

2. Greater Flexibility

    The Action Team recommends greater flexibility in our donations policy and guidelines.

3. Donations Guidelines

    It is recommended that guidelines, examples and case studies be developed to help guide school leaders in dealing with donation issues. The following issues should be considered in drafting guidelines:

    a) No acceptance should be construed to be a testimonial or endorsement by the Board of a product or business enterprise.

    b) All gifts, grants, donations and bequests shall become the property of the Board.

    c) The nature of the gift, grant, donation and bequest must contribute positively to the education, comfort or welfare of the students.

    d) Board policies and regulations must be strictly followed for the acceptance of all gifts, grants, donations or bequests.

    e) That The Peel Board of Education discourage corporations that represent organizations and products that are not conducive to the moral and ethical fabric of the Board.

IV. ESTABLISH A FORMAL REGIONAL PARTNERSHIP STRUCTURE WHICH WOULD BRING TOGETHER EDUCATION, GOVERNMENT AND BUSINESS

1. Umbrella Organization

    A formal umbrella organization should be formed to bring together education, government and business (including labour and professionals).

2. Education as an Entity

    Education should be seen and involved as a complete entity--including the Dufferin Peel Separate Board, Sheridan College and Erindale College.

3. **A Group of Decision-Makers**

The umbrella group should include top level decision-makers from business education, and the community. A board or steering committee should be formed to include these representatives.

4. **Not Dominated By One Partner**

The partnership (education and business) should be guided by an umbrella organization that is not dominated by any one partner.

5. **Objectives for a Formal Partnership Structure**

• The Action Team recommends the following objectives for a formal partnership structure for the purpose of discussions with other organizations:

• To broaden the base of support for relevant schooling, and to channel business, community and school resources toward the solution of mutual problems.

• To bring all the educational resources within a community together.

• To serve as a system-wide umbrella for coordinating business-education cooperative efforts.

• To serve as a continuous forum for representatives of business and education to discuss mutual interests and concerns.

• To promote and encourage communication and cooperation between business and schools and help improve the total educational program.

6. **Resources**

The establishment of an umbrella partnership structure will require staffing and other resources. A funding plan will be needed. Funding will need to come from a variety of sources including education. Some funding is available from the Ministry of Education for the establishment of formal partnership structures.

4. RESEARCH

REVIEW OF THE PROFESSIONAL LITERATURE AVAILABLE ON PARTNERSHIPS AND FIRST HAND RESEARCH ON CURRENT PARTNERSHIPS IN ONTARIO

A great deal has been written about "Education Partnerships." Through the services of the J.A. Turner Professional library, the Partnership Action Team conducted an extensive review of information pertaining to school-business/community partnerships in Canada and the United States. Through the literature, the team identified partnership successes and pitfalls. The literature also described the wide range of activities classified as "partnerships."

The team conducted first hand research. Guest speakers from the Peel Board, Niagara Peninsula Industry Education Council and the Ministry of Education were invited to attend an Action Team meeting to discuss partnership models. Team members conducted telephone and on-site interviews investigating current partnership initiatives in other boards throughout Ontario. These included: The Perth Education Foundation; Hamilton -Wentworth Industry Education Partnership Council; Cornwall Industry-Education Council; the York Region Education Foundation; London Industry-Education Council; North York CORE Education; City of York - Learning and Enrichment Foundation.

In addition, information and policies on foundations, donations and fund raising were requested from 45 boards in the United States.

This research information guided the Partnership Action Team in developing recommendations that reflect the unique needs of the Peel Board (the size of the school system, the problems of funding, changing demographics, the need for communications). This study and discussion have been helpful in sorting out potential activities and issues. The Action Team believes that while we can learn from the successes of other partnerships, a model should be designed especially for Peel.

ASSESSING WHAT TYPES OF PARTNERSHIP ACTIVITIES ARE UNDERWAY IN PEEL

In order to have an informed discussion about the possibility of additional and/or strengthened partnerships in Peel, the Action Team sought to gain an understanding of current efforts.

To help identify school, field office and department activities, a written survey was conducted in the winter of 1991 through the H.J.A.Brown Circular. Staff were also encouraged to submit responses through an article in P.S.*. While the survey responses may not represent all of the partnership activities in Peel, over 400 partnerships were identified through this process. In addition, members of the Action Team conducted follow up interviews with superintendents, trustees, principals, other staff and community representatives, to make sure that the survey list was as complete as possible.

The responses indicate that the Peel Board is already involved in many successful partnership efforts. The survey results further reinforce the diversity of activities classified as partnerships. The range of partnership activities includes: guest speakers, donations, mentors, communication, problem solving, sharing of facilities and expertise, training, field trips, cost sharing, joint sponsorship of projects. Partners include business, education, community organizations/service groups, government. Copies of the complete survey are available through the Communications Department.

This survey information served as the foundation for an indepth study. Team members met with selected partnership participants to gather their opinions on the qualities contributing to a successful partnership and suggestions for ways the Board could improve these initiatives throughout the region.

5. A TWO WAY COMMITMENT – THE BENEFITS OF PARTNERSHIPS

BENEFITS FOR THE PEEL BOARD

Partnerships, with education, government, business or community, could offer the Peel Board of Education the following benefits:

- An enhancement to the program and services offered by the Board.

- Help in developing curriculum to better prepare our students for entry to post secondary education or work.

- Leadership development opportunities for students and staff.

- Strengthened communication and greater community support for the Peel Board of Education.

- Expanded staff development.

- Career education opportunities for staff and students.

- Cooperative sharing of resources (material and personnel), information, facilities, services.

- Financial benefit or funding support.

BENEFITS FOR OUR PARTNERS

One of the difficulties with so called "partnership" activities, is that often only one partner benefits from the association. Many of the early U.S. partnership activities fell apart because there wasn't a two-way commitment. For example, businesses that "adopted a school" by simply providing funding or resources quickly lost interest. Without shared goals, mutual respect and some kind of return on the investment, partnerships will not thrive. The Peel Board has a great deal to offer partners including:

- Excellent training facilities and instructional staff.

- Assessment and career development centres.

- Continuing education opportunities.

- The opportunity to make a difference in the education of today's youth.

- Access to a potential volunteer work force (students).

- A motivated work force interested in keeping up with the latest changes in the world of education and work.

- Communication opportunities with staff, students and the community.

- A variety of educational programs and services.

- Educational expertise.

- Statutory authority.

- Access to information about the educational system.

6. THE PITFALLS OF PARTNERSHIPS

AREAS OF POTENTIAL CONCERN

The Action Team firmly believes that the benefits of strong partnerships, outweigh the potential for loss. However, when launching new efforts it is important to recognize potential concerns. Identifying these concerns in the planning stages will highlight issues to be addressed when partnerships are forged.

Following are some of the potential concerns that may arise from new partnership initiatives:

- Conflict of interest.

- A reduction in service to our students/rate payers.

- Strain on Peel staff and resources.

- Duplication of efforts.

- A diversion of the Board's educational mandate.

- Loss of objectivity or independence, through commitments tied to dollars.

- Assumption of non-mandated responsibility.

- Fragmentation of declining budgets and time, to maintain contact with each partner.

- Competent Peel staff may be attracted into positions outside of the Board.

- Some relationships may offer little return to the Board.

These are areas that should be monitored.

FACTORS THAT MAY INHIBIT PARTNERSHIP ACTIVITIES

Any good relationship requires commitment and work. Attacking some of the possible road blocks will help us to avoid future problems and disappointment. Following are some of the factors that may inhibit partnerships:

- Lack of trust.

- Poor communication.

- Lack of commitment by one or more participants.

- Unclear expectations, lack of a clear definition of the goals/purposes of partnerships.

- The need for start-up funds.

- Competition with other organizations.

- Territorial perogative.

- Conflicting goals.

- Limited resources; lack of required expertise or time.

- Lack of staff support.

- Ethical issues (particularly with corporate sponsorships).

- Too many people representing the Peel Board of Education sending confusing or mixed messages.

- Lack of continuity.

- Lack of reinforcement, recognition or rewards.

7. SCHOOL BASED PARTNERSHIPS--COMMUNITY AND SERVICE GROUPS

SITE-BASED MODEL

The Action Team identified many successful school based partnerships currently underway in Peel. The participants involved in these activities varied from school to school and community to community. The common element of successful initiatives was a personalized partnership model. In other words, partnership efforts work best when they are specifically designed to meet the unique needs of the school and local community. The leadership and commitment at the school level is also a critical factor in launching and sustaining partnerships.

At the same time, the Action Team recognizes that some regional support is necessary. At a regional level some groundwork needs to be laid to facilitate and support site-based programs. The primary purpose for regional coordination is communications, not regulation.

The Action Team offers the following recommendations for school based partnerships:

1. In developing and maintaining individual school partnerships with community and service groups, the site-based management model is recommended. This means that each school should develop its own plans and liaisons according to what suits the school and local community.

2. At a regional level, there should be one department/person responsible for supporting partnership activities. The coordination would help identify potential community partners and the degree and type of interest these partners would have in school involvement.

3. The primary purpose for regional support is communication not regulation. Coordination would help avoid duplication of efforts. This would also help open some doors and provide credibility to the local overtures or inquiries.

4. It is recommended that a directory or catalogue of service/business group contacts could be compiled and be made available to each school.

SCHOOL BASED STRATEGIES

In addition, the following are suggested School Based Partnership strategies:

Suggested Partnership Strategies - (School-based):

It is suggested that school leaders:

1. Explore the potential for benefits and losses in their school.

2. Develop a school-based plan.

3. Use the past experiences of others. It would be helpful for each school to record and keep on file past liaison activities with service/business groups so that these can be maintained even as staff changes.

4. Consider creating the role, "community liaison officer" to co-ordinate activities. Develop strategies for continuity to make sure partnerships are not lost if key staff members leave the school.

5. Consider acquiring membership in local service groups to strengthen liaison.

6. Consider equal access by various service groups.

7. Consider problems of conflict of interest concerns that could arise from partnership activities.

8. DONATIONS AND SPONSORSHIPS

The Peel Board of Education has many needs that cannot be funded using traditional tax and grant methods, particularly during difficult fiscal periods. It is therefore necessary for the Board to review alternative funding methods such as donations and sponsorships. The Action Team reviewed many successful programs for sponsorships and donations. Currently the Board's policy is restrictive and does not encourage donations and sponsorship.

The Action Team makes the following recommendations:

1. Encourage Donations
The Peel Board of Education encourages individuals and corporations to participate in the activities of the Board through sponsorships and donations of time, service, goods and financial gifts.

2. Greater Flexibility
The Action Team recommends greater flexibility in our donations policy and guidelines

3. Donations Guidelines
It is recommended that guidelines, examples and case studies be developed to help guide school leaders in dealing with donation issues. The following issues should be considered in drafting guidelines:

a) No acceptance shall be construed to be a testimonial or endorsement by the Board of a product or business enterprise.

b) All gifts, grants, donations and bequests shall become the property of the Board.

c) The nat+--e of the gift, grant, donation and bequest must contribute positively to the education, comfort or welfare of the students.

d) Board policies and regulations must be strictly followed for the acceptance of all gifts, grants, donations or bequests.

e) That The Peel Board of Education discourage corporations that represent organizations and products that are not conducive to the moral and ethical fabric of the Board.

9. FORMAL REGIONAL PARTNERSHIP STRUCTURE

PARTNERSHIP MODEL

The Partnership Action Team investigated numerous formal partnership models. Models which were studied and discussed included: foundations, corporate projects, Industry Education Councils, large scale fundraising initiatives and corporate sponsorships. There are dozens of partnership models, the challenge is to build the best possible model for Peel.

The Team examined the literature, made site visits and conducted extensive interviews. The Team arrived at the conclusion that some type of formal regional structure was needed in Peel. For purposes of discussion, the major objectives for a Peel Partnership model were identified:

1. To broaden the base of corporate support for relevant schooling, and to channel business, community and school resources toward the solution of mutual problems.
2. To bring all the educational resources within a community together.
3. To serve as a system-wide umbrella for coordinating business-education cooperative efforts.
4. To serve as a continuous forum for representatives of business and education to discuss mutual interests and concerns.
5. To promote and encourage communication and cooperation between business and schools and to help improve the total education program.

BUSINESS RECOMMENDATIONS

Several business representatives were invited to attend a discussion session with the Team. Business representatives were asked to comment and offer advice on creating strategies for increasing cooperation and collaboration between the Peel Board and business and industries in our community. The following issues were identified by the business participants.

- There is a great deal of interest in developing business-education partnerships. The consensus was that we don't have a choice -- we need to work together to bring about changes in education and business to help us be more competitive.

- We need to act quickly. Reaction time will be the biggest issue for education.

- There needs to be a formalized umbrella structure, that is not dominated by one partner.

- We need to look to the leaders and decision makers in the business and education community to participate in this organization.

- We need to involve other education and business representatives in further discussions. The participants in this discussion session were interested in continued involvement.

As a result, the Partnership Action Team offers the following recommendations:

ACTION TEAM RECOMMENDATIONS

1) We need and want partners.

2) We believe than an umbrella organization should be formed to bring together education and business.

3) Education must be seen and involved as an entity including Sheridan College, Erindale College and the Dufferin-Peel Separate Board. We want to pursue the educational partnerships to form an entity.

4) The umbrella group should include decision-makers from business, education and labour. These groups would likely serve as representatives on a board or steering committee.

   In an advisory capacity the umbrella group will probably want to communicate with representatives from government, the multicultural community, community service agencies, police, the community at large, politicians and the religious community.

5) The partnership (education and business) must be held together by an umbrella organization that is not dominated by any one partner.

6) This will require staffing so that an individual reporting to the "corporation" can make things happen.

7) This will require a budget. The "corporation" or umbrella structure will need to identify a funding plan.

8) The business community wants ACTION and speedy response time, not another study.

9) We would like to pursue these recommendations recognizing that:
   - We will have to give up some authority.
   - We will raise expectations in the education and business communities.
   - By undertaking this initiative, we are inviting change and perhaps criticism.

This will require careful planning and a leap of faith with respect to the benefits of collaborative activity.

10. CONCLUSION

Education is everybody's business. A strong community depends on strong schools and a well educated work force. In turn, strong schools depend on community support and understanding. This comes from working together.

Business and municipal groups are concerned, many are already establishing their own education task forces and study groups. There is a great deal of interest and energy focused on the importance of education. The Peel Board has an excellent opportunity to take the initiative and extend an invitation to business, local government and service groups to become our partners.

THE PEEL BOARD OF EDUCATION

VALUES AND VISION TEAM REPORT

Prepared and Submitted by: Hal Brooks, Brampton Reg. Ed. Centre (Chair)
Heather Crase, Corsair P.S.
Elspeth Hannan, Continuing Education
Dave Leeder, Park Royal Field Office
Carol Mortimer, Admininstrative Services
Tony Pontes, Chinguacousy S.S.
John Rennie, Dunrankin Field Office

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VALUES AND VISION TEAM REPORT

Much has been written about the importance of building and maintaining corporate "culture". Shared values and vision are essential to align people with the mission of any successful organization. In Peel our Values and Vision statements are important foundational components of the Strategic Planning Process; they provide a template which will shape the future of our board. "Culture and values will likely be more important than organizational structure in achieving the Peel Board's vision effectively and efficiently" (Peat Marwick).

With over 80% of our annual budget dedicated to salaries, Peel staff represent a tremendous investment. It is critical that our people be encouraged to contribute their full range of talents and energies. There is an enormous hidden cost of any failure to capture the hearts and minds of people.

A Values and Vision in Action Program has been established to help address the human side of change associated with Strategic Planning. Middle management has been the initial target group. This sector is often at the front of service delivery but at the edge of decision-making. Our system leaders will be drawn from this group in the future.

The first cohort of 25 staff met in May, 1991. It included co-ordinators, secretaries, vice-principals, custodians and administrative staff representative of various board office functions. A follow-up session for participants was held in the fall. A second group of staff started inservice sessions in November.

The goals for this initiative include:

- helping staff internalize the values and vision of the Peel Board,
- providing opportunity to study the change process and consider future challenges and opportunities,
- providing a venue for middle management staff to explore how to make a personal, positive difference in Peel,
- assisting in the development of leadership in staff who are better equipped to lead the Board in to the next century according to our vision and value statements,
- working in a manner best described as low key, responsive and collaborative.

Positive internal relationships and cross functional "connectedness" are seen as essential to breaking down the isolation which often paralyzes employees, and to building a strong effective team. Openness, candour and mutual respect are key ingredients in the process. This program is a clear demonstration by our organization that it cares about its people and genuinely needs them to carry its corporate mission.

Evaluation results indicate that participants have found the sessions to be useful and hopeful; useful because of the knowledge and skills shared by participants, hopeful because of the sincere belief that the system values individual contributions and that people "can make a real difference".

Continuous improvement involves hundreds or thousands of often small scale innovations that when added together make an enormous difference. It is best made by those individuals who are intimately familiar with every aspect of the job being done. It requires proper training, shared values and vision which provide alignment of contribution, shared benefits, faith in our employees and a culture which supports risk taking.

Plans are underway to extend this initiative across the broad middle management target group. These individuals have tremendous leverage for change and impact given their strategic position in our system. Transformation will not be accomplished overnight. In a real sense it involves being "cultural architects" with all the excitement, challenge and potential this involves.

STRATEGIC PLANNING COMMITTEE OF SYSTEM PARTNERS

MEMBERS

J. Beaton, Superintendent of Schools, Brampton Regional Education Centre
C. Bridge, Superintendent of Special Services
R. Christoff, Media Technicians Association of Peel, c/o North Park S.S.
F. Tomchishen, Cupe 1628
T. Howe, Administrative Staff Group
W. Hulley, Associate Director of Education (Chairman)
R. Jackson, P.A.S.S.P., c/o John Fraser S.S.
A. Jupp, Trustee
W. Kent, Chair of the Board
R. Lee, Director of Education
L. Mason, Peel Principals and Vice-Principals, c/o Fairwind Sr.
B. McCulloch, President, O.S.S.T.F. District 10
D. McDowell, Director of Communications
M. Morrison, Trustee
G. Lovely, O.P.S.T.F. Peel
M. Roy, Associate Director of Education/Business
N. Vail, Peel Women Teachers' Association

WORK GROUP

B. Bellis, Supervisor Employee Relations
D. Brown, Resources & Development Officer
M. Evans, Staff Development Officer
R. Evans, Social Science Co-ordinator
P. Favaro, Chief Research Officer
W. Lambie, Superintendent of Research & Development
B. Wiele, The Centre for High Performance
J. Wilton, Computer Education Co-ordinator

ACTION TEAM CHAIRS

J. Beaton, Superintendent of Schools (School Programs Team)
M. DeAngelis, Vice-Principal, Clarkson S.S. (Values & Discipline Team)
W. Hulley, Associate Director of Education (Human Resources Team)
D. McDowell, Director of Communications (New Partnerships Team)
C. Rumley, Principal, Lorne Park S.S. (School Success Team)
H. Brooks, Superintendent of Schools (Values & Vision Team)

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