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

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume I: Project Description

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March, 1977

Department of Educational Planning
THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY S. Pedro"

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APPENDIX J  DECISION FUNCTION

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

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

At the level of the schools, the author would like to thank all the principals, elementary and secondary, for their contribution to the project. Without exception, they completed a very difficult and time-consuming task admirably.
Due to the time-span of the project, the OISE membership on
the project team varied. The author wishes to acknowledge the
contribution of all the OISE participants in this study. Particular
thanks are extended to Ted Vangel, principal investigator of the
project through the major part of its duration, for his substantial
contribution to the study. His unavoidable loss to the project during
its final stage was most regrettable. The author is also indebted to
James K. Martin, a graduate student who contributed a great deal to
the initial conceptualization and operational procedures of the
project, and utilized this experience as the basis for a fine Ph.D.
thesis. Thanks are also extended to Bryan Elwood, Derry O'Mahony
and Dave Sučerman who contributed to various stages of data acquisition
and analysis, particularly during the early stages of the study.

Finally, the author wishes to acknowledge the funding support
for the project by the OISE Research and Development Office and by
the Dufferin Board of Education. Without their generous support,
this project would not have been possible.
INTRODUCTION

An information system is defined as a network of communication channels that links, processes, stores, retrieves, redistributes, and feeds into personal and collective decision making processes. A Management Information System (MIS) is one that supports the total decision making process by supplying relevant information when required. The basic purpose of MIS are to:

- provide timely information to management
- aid the allocation of resources
- aid the selection of alternatives

in supplying relevant, reliable and timely information upon which to base decisions.

OBJECTIVES AND SCOPE OF THE STUDY

It was the objective of this project to analyze the managerial decision-making at the central office level of the Dufferin County Board of Education in order to design an integrated information system.

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

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

Although the focus of the study was the central office of the Board, it was expected that studying the information needs of the elementary
and secondary schools could provide a useful basis for standardizing their databases—especially important at a time of rapid movement of principals at the elementary school level.

Since the Board was expecting to undergo organizational changes within the course of the study (and did, in fact, undergo such changes subsequent to its inception), it was expected that the study would provide insights which could be useful in the analysis necessary for organizational change. In addition, it could facilitate the implementation of such change by providing for continuity through systematic analysis of decision functions which must exist in areas of changes in personnel.

Unfortunately, organizational and staff changes at the board during the course of the study caused considerable delays in its completion. This was due to (1) time required to update the decision actions studied at the outset and (2) unanticipated loss of board staff members who were to provide critical elements of data for the completion of the study. For these reasons, the last step in completing the systems analysis is outlined at the end of the study and is left to the administrative staff at the Board.

APPROACH OF THE STUDY

The design of the Management Information System, as conceived in this project, is based on user needs rather than the traditional computer-oriented approach of MIS. This means that the systems design is based on the information needs of the users rather than on the hardware constraints of the computer. All media for storage,
processing and retrieval, including the manual component are considered relevant to the system. In a small board such as Dufferin, the computer may not even be a relevant component of the system. The result is a total, integrated system which best serves the information requirements of the Board's decision makers.

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

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

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

Management Levels and Information Flow

Director, Trustees, Superintendents

Policy Management Information (planning)

Support for Decisions

Superintendents & Administrators

Operating Management Information (Control)

Demand Reports

Information Requests

Administrative Support & Teacher

Payroll Accounts Receivable Accounts Payable Inventory Control Bus Transportation Student Counseling Testing Progress Reporting

Transactions

Schedule Reports

STRATEGIC PLANNING

MANAGEMENT CONTROL

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

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

The approach of the study for the OISE study team to conduct intensive interviews with Board officials ("users"), review the outcomes both with the officials interviewed and with the Director of the Board, update and revise these as necessary, and conduct the technical analysis. The key officials and staff at the
Dufferin Board were responsible for providing all the necessary information inputs for the study. These officials and staff members were extremely helpful and cooperative in spending large amounts of time and energy in providing all the information at their disposal to the study. Turnovers in officials, organizational changes and loss of a critical administrative staff member caused unfortunate but unavoidable delays in project completion.

SUMMARY OF OUTCOMES

The outcomes of the study can be summarized as follows:

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

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

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

4. Recommendations for system implementation. Outline of further steps required for operational system design and implementation.
ANALYSIS PROCEDURES AND OUTPUTS

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

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

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

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

A. INITIALIZATION

B. SCHOOL LEVEL

1. Analysis
   - identify users
   - determine major decision functions

2. Synthesis
   - integrate decision functions of principals
   - determine information requirements

C. CENTRAL BOARD OFFICE

1. Analysis
   - identify users
   - determine major decision functions
   - analyze processes of decision making
2. Synthesis

- integrate decision functions of board officials
- determine information requirements

A. School Level

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

Elementary Schools

At the time of the study, there were ten elementary schools in the system. The first step of the analysis was to determine the principals' decision functions. Each principal was asked to complete a form which listed his major decisions, along with frequency, time of year, and general area into which the decision could be classified. Due to the very large set of decisions which a principal must handle daily, the principals found that it would be easier to compile a list of major decisions jointly (since ultimately this was the purpose of the exercise, in any case). Further analysis indicated that this list could be synthesized into six general categories of decision: students, instruction, staff, community relations, plant and transportation.
Table 1 provides a general breakdown of these main decision areas. Appendix A contains the complete amalgamated list of the elementary principals' decision functions and an indication of the timing of these decisions. Tables 2a and 2b are samples from that appendix. Table 2a defines the decisions listed in category 1.1. Their code numbers relate to the specific decisions within a classification. For example, D1,1,1 indicates a decision (D) in the first category, the first sub-category and that it is the first decision on the list. Thus, it relates to the category of student-related decisions, deals with the area of student progress and impediments, and specifically, relates to the adjustment of pupil assignments to classes (D1,1,1). Each category of decisions listed in Table 1 is similarly broken down into specific decisions. These are found in Appendix A.

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

Having compiled an amalgamated list of the major decision functions of elementary school principals and their timing, the next step was to define the information required as inputs to each decision area. These were compiled by the elementary principals in conjunction with the OISE study team. Table 3 provides a sample listing of these information requirements. Appendix B provides the complete list of information requirements for all the decisions listed in Appendix A. This information, along with the
timing of decisions noted in Appendix A, can be used for scheduling the data acquisition and processing to meet required deadlines for decision-making by the principals. Four elementary schools were next selected at random to examine the actual files maintained for each of the categories of information noted in Appendix B. These were: Princess Margaret Public School, Princess Elizabeth Public School, East Garafraxa Central Public School, and Parkinson Centennial Public School. The results of this examination are included in Appendix C.

Secondary Schools

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

Each principal completed a form which provided a list of his major decision functions along with frequency, time of year and the area of the decision. Table 4 is a sample page from such a list. Appendix D contains the individual lists for the two secondary principals. The two principals then developed a combined list of decisions, along with their associated information requirements. This list appears in Appendix E Part One. This merged list was further refined and developed into an amalgamated decision list for secondary principals in the same format as for the elementary principals, along with the timing of each decision. This list is also found in Appendix E.
## TABLE 1: CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

1. **STUDENTS**
   1.1 Student Progress/Impediments
   1.2 Student Guidance
   1.3 Student Relationship to Physical Plant, Equipment

2. **INSTRUCTION**
   2.1 Curriculum
   2.2 Instruction Budget

3. **STAFF**
   3.1 Staff: Hire, Terminate, Assess, Allocate
   3.2 Staff Professional Development

4. **COMMUNITY RELATIONS**
   4.1 Community Relations - Parents
   4.2 Community Relations - Other

5. **PLANT**
   5.1 Relations with Custodian
   5.2 Maintenance
   5.3 Facility Requirements
   5.4 Fire Drill

6. **TRANSPORTATION**
   6.1 Transportation
TABLE 2a: SAMPLE PAGE OF AMALGAMATED DECISION LIST OF ELEMENTARY PRINCIPALS

1.3 Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities
D1,3,2 - Student breakage
D1,3,3 - Use of school equipment by the students

2. INSTRUCTION

2.1 Curriculum

D2,1,1 - Introduction of a new programme
D2,1,2 - Philosophy and implementation, policy type decisions
D2,1,3 - What will electives (if any) be?
D2,1,4 - Assessment of an ongoing programme
D2,1,5 - Decision on old/new programme
D2,1,6 - Adjustment of programmes
D2,1,7 - Adjustment brought about to or because of D2,1,2
D2,1,8 - Areas of school concentration
D2,1,9 - Extra class learning, school activities, athletics, assemblies, etc.
D2,1,10 - Field trips, cost, transportation, etc.

2.2 Instruction Budget

D2,2,1 - Budget, twice yearly material - Textbooks
- library books
- consumables
- spec. ed.
D2,2,2 - Budget, twice yearly material - industrial arts
D2,2,3 - Budget, once yearly material - sports equipment
TABLE 2b: TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student Progress, Impediments

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</tbody>
</table>
TABLE 3: Sample Page of Elementary School Principals' Information Requirements

- D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES
  - registers
  - master class lists
  - test results
  - teacher assessment
  - report card
  - attendance summary

- D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS
  - medical report
  - psychological report
  - special equipment
  - transportation
  - O.S.R.
  - special Ed. report.

- D 1,1,3 ASSESSMENT OF SPEECH—Who require what help
  - identification characteristics file
  - referral file--Confidential Report
  - health record
  - O.S.R.
  - teacher assessment

- D 1,1,3 (b) ASSESSMENT OF HEARING
  - health record
  - O.S.R.
  - public health nurse report
  - teaching prescription

- D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION
  - candidate list
  - psychological report
  - academic report
  - health record
  - O.S.R.
  - report card
  - parent's permission
### TABLE 4: INDIVIDUAL SECONDARY PRINCIPAL'S DECISION LIST - SAMPLE

<table>
<thead>
<tr>
<th>Decision</th>
<th>Decision: give a name and a brief description</th>
<th>Frequency</th>
<th>Area of decision</th>
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<tr>
<td>1</td>
<td>What courses to list on the option sheet</td>
<td>once a year</td>
<td>Curriculum</td>
</tr>
<tr>
<td>2</td>
<td>What format of option sheet</td>
<td>Fall</td>
<td>Curriculum</td>
</tr>
<tr>
<td>3</td>
<td>What courses to offer when results of option sheets are known</td>
<td>once a year</td>
<td>Curriculum</td>
</tr>
<tr>
<td>4</td>
<td>How many sections of each course to offer</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>5</td>
<td>What rooms to assign to each course</td>
<td>Mar</td>
<td>Facilities</td>
</tr>
<tr>
<td>6</td>
<td>What teachers should be hired, based on teacher-pupil ratio</td>
<td>once a year</td>
<td>Recruitment</td>
</tr>
<tr>
<td>7</td>
<td>How many times to advertise each position</td>
<td>as need arises</td>
<td>March - June</td>
</tr>
<tr>
<td>8</td>
<td>What ratio of teacher to paraprofessionals to fill teacher-pupil ratio</td>
<td>once a year</td>
<td>Recruitment</td>
</tr>
<tr>
<td>9</td>
<td>How many classes should each teacher teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>10</td>
<td>How many classes should Department Heads teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>11</td>
<td>How many classes should Program Supervisor teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>12</td>
<td>How many classes should Vice Principal teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>13</td>
<td>How many classes should Chairman teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>14</td>
<td>How many classes should Assistant Department Head teach</td>
<td>once a year</td>
<td>Curriculum</td>
</tr>
<tr>
<td>15</td>
<td>How many classes should Principal teach</td>
<td>Feb</td>
<td>Curriculum</td>
</tr>
<tr>
<td>16</td>
<td>What classes each Vice Principal is responsible for discipline and attendance</td>
<td>once a year</td>
<td>Attendance</td>
</tr>
</tbody>
</table>
B. Central Board Level

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

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

On the basis of this set of individual decisions, an amalgamated list of board level decision functions was compiled. This list is presented in Appendix H. Table 6 indicates the general categories of decisions for the central board office administrators, and Table 7 presents a sample page of the amalgamated set of decisions. These decisions are coded both within the integrated set of board level categories as well as cross-referenced to the original individual decision lists.
### TABLE 5: SAMPLE INDIVIDUAL DECISION LIST AT CENTRAL BOARD OFFICE

**Title:** Director of Education and Secretary-Treasurer

<table>
<thead>
<tr>
<th>Number</th>
<th>Decision</th>
<th>Frequency</th>
<th>Time of Year</th>
<th>Board Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>R01</td>
<td>Allocation of Director's time:</td>
<td>Continual</td>
<td>All</td>
<td>(1) Organizational Planning</td>
</tr>
<tr>
<td></td>
<td>a) Organization of time to various responsibilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- what can be delegated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- to whom</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b) Priorities on personal time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R02</td>
<td>Interpretation of</td>
<td>Continual</td>
<td>All</td>
<td>(2) Organizational-Executive Level</td>
</tr>
<tr>
<td></td>
<td>- Board policy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- needs and wants of personnel; how to handle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R03</td>
<td>Budget preparation</td>
<td>Yearly</td>
<td>Oct-Feb</td>
<td>(3) Administrative Relationships</td>
</tr>
<tr>
<td></td>
<td>- regular needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- special needs and projects</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- how much total budget can mill rate stand politically</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- how much total budget can ceiling stand</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R04</td>
<td>How should budget be distributed among schools</td>
<td>Yearly</td>
<td>Feb</td>
<td>(3) Administrative Relationships</td>
</tr>
<tr>
<td>R05</td>
<td>Budget control</td>
<td>Monthly</td>
<td>All</td>
<td>(3) Administrative Relationships</td>
</tr>
<tr>
<td></td>
<td>- day school regular</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- conferences, courses during year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- What summer courses for teachers should be subsidized by the Board?</td>
<td>Yearly</td>
<td>Nov</td>
<td></td>
</tr>
</tbody>
</table>
TABLE 6: CLASSIFICATION OF CENTRAL OFFICE DECISIONS

1. INSTRUCTIONAL PROGRAM
   1.1 Budget
   1.2 Academic Program

2. STAFFING PROGRAM
   2.1 Staff Relations
   2.2 Hiring
   2.3 Professional Development
   2.4 Salary
   2.5 Organization

3. RELATIONS (Board/Community)
   3.1 Board
   3.2 Community

4. TRANSPORTATION
   4.1 Transportation

5. PLANT
   5.1 Problems Arising
   5.2 Accommodation
TABLE 7a: SAMPLE OF AMALGAMATED DECISION LIST AT CENTRAL BOARD LEVEL

2.5 Organization

D2,5,1 - Organizational Changes (R10)

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

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

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

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

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

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

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

3.2 Community

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

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

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

4. TRANSPORTATION

4.1 Transportation

D4,1,1 - Determination of Transportation Arrangements with Bus Operators (Routing, Loading, Payment) (B10)
TABLE 7b: TIMING AND SEQUENCE OF CENTRAL BOARD LEVEL DECISIONS (Sample)

1. INSTRUCTIONAL PROGRAM

1.1 Budget

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>D1,1,1</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D1,1,2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D1,1,3</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>D1,1,4</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>D1,1,5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1.2 Academic Program

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>D1,2,2</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>D1,2,4</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D1,2,5</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D1,2,6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
In addition, the board level decisions were also classified according to the board functions specified in Appendix F. This classification scheme is presented in the second half of Appendix H. The reason for this additional classification of decision functions was the production of the document of board level functions after the original categorization scheme was developed. It was felt that such cross-classification would provide additional useful inputs to the board. Following the compilation of the amalgamated list of board decision functions, a synthesized list of the sequence and timing of these decisions was developed. Table 7b provides a sample of this synthesis. Appendix I contains the full list of these decision sequences.

Since the focus of the study was the central board office, a more detailed analysis of the decision functions was conducted than at the school level to determine the relevant information requirements. The approach consisted of detailed interviews with each of the key board officials to produce flowcharts of the processes involved in each of the decision functions on his list. These flowcharts were sufficiently detailed to include the points at which information was utilized in the process as inputs and information which resulted as outputs of the process. This analysis served a multi-fold function: (a) it allowed the board officials the opportunity to analyze their decision-making activities in a manner that they would not normally be able to, (b) it served to indicate the interrelationship between different decision functions of the board, and (c) it provided a more valid and reliable means of determining the actual information relevant to the decision-making process than simply asking for a list of information items used.
FIGURE 2: SAMPLE FLOWCHART OF BOARD LEVEL DECISION FUNCTION

STRIKING COUNTY PUPIL/TEACHER RATIO

i) Secondary

```
Dep'n of P/T ratio -- trustees' council

Find out P/T R by schools

P/T Ratio by school

Composition - size of schools

Propositions of programs

Special problems of sch. note special courses

Reasons for deviations

Set new P/T Ratios by school

New P/T Ratios by school

Count P/T R

Set county P/T Ratio

Get Board approval

Approved

Extra personnel required
```

ii) Elementary

```
P/T Ratio across Province

Projected enrollment

Size/Types of classes in each sch. next yr.

Determine P/T R for sch. & overall

Extra personnel required

Itinerant teachers - spec. ed. etc.

P/T Ratio for county next year

Get county P/T Ratio approved
```

P/T Ratio for each sch. next year
Figure 2 is a sample flowchart of the variety described. Appendix J contains the total set of flowcharts for the central office decision functions. Where several decision areas utilized the same sub-set of decisions, these were flowcharted separately and called "Information Transformation Modules". These represent areas of information-generating activities common to more than one decision function. Table 8 is a list of all the Information Transformation Modules in the central board decision functions. These too are found in Appendix J.

From these flowcharts, a list of required information items was compiled for each decision. Table 9 is an example of such a listing. Appendix K contains the total set of information needs by decision functions at the Board level.
<table>
<thead>
<tr>
<th>ITM1</th>
<th>Enrollment Projections (Twice Yearly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITM2</td>
<td>Revenue Projections (Twice Yearly)</td>
</tr>
<tr>
<td>ITM3</td>
<td>Maintenance Cost Projections</td>
</tr>
<tr>
<td>ITM4</td>
<td>Debt Charge Projections</td>
</tr>
<tr>
<td></td>
<td>Estimated Revenue for Salaries</td>
</tr>
<tr>
<td>ITM5</td>
<td>Busing Costs Projection</td>
</tr>
<tr>
<td>ITM7</td>
<td>Facilities Projection</td>
</tr>
<tr>
<td>ITM8</td>
<td>Amount Available for Schools (Jan.-Feb.)</td>
</tr>
<tr>
<td>ITM9</td>
<td>Assessment of Present Program</td>
</tr>
<tr>
<td>ITM10</td>
<td>Review of Present Curriculum in Print</td>
</tr>
<tr>
<td>ITM11</td>
<td>New Curriculum Needs</td>
</tr>
<tr>
<td>ITM12</td>
<td>M.E. Guidelines</td>
</tr>
<tr>
<td>ITM13</td>
<td>Priority of Needs</td>
</tr>
<tr>
<td>ITM14</td>
<td>Determine Money Available for Elementary School Staffing</td>
</tr>
<tr>
<td>ITM15</td>
<td>Data by Criteria (Evaluation of Elementary Principals)</td>
</tr>
</tbody>
</table>
TABLE 9:  SAMPLE LIST OF INFORMATION REQUIRED FOR BOARD LEVEL DECISIONS

(3) ADMINISTRATIVE RELATIONSHIPS

R03  Budget Preparation

Documents
Accumulation file on desired budget expense
Basic form from central office
Desired items with priority attached
Principal's opinion
Superintendent's prior assessment of needs
Estimated amount for main budget
Supervisor of plant - estimate of prices
Budget for main (implied)
Proposed main budget

Consumable/Cap. Alloc.
Principal's consumable and capital allocation requests
Goals of county system progress
Average per pupil allotments across province
P/T ratios by school
Econ. milieu inflation
Per pupil allotments
Needs of spec. ed. music etc.
Total reg.
ME grant regulation
Assessment (by area)
Mill rate
Proposed budget
RESULTS OF THE STUDY

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

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

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

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

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

<table>
<thead>
<tr>
<th>Decision Function:</th>
<th>Information Needs</th>
<th>Sources</th>
<th>Timing</th>
</tr>
</thead>
</table>

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

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

3. Data files can be designed by identifying clusters of information needs as they relate to board functions or categories of board decision areas. This can be done by developing a matrix classification of decision areas vs. associated information categories.
"Information categories" are those which can then relate to data files. The latter can be obtained from Appendix K and documentation of source files noted in Step 1 above. The following format can be used as a guide:

**INFORMATION CATEGORIES**

<table>
<thead>
<tr>
<th>DECISION AREAS</th>
<th>Personnel Adm</th>
<th>Staff Development</th>
<th>Staff Evaluation</th>
<th>Finance</th>
<th>Purchasing &amp; Supplies</th>
<th>Plant &amp; Facilities</th>
<th>Student Services (Special)</th>
<th>Instructional Program</th>
<th>Student Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Instruction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Budget</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Academic Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(See Table 6 for entire list of areas)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

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

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume II: Technical Appendices - School Level

Susan Padro

March, 1977

Department of Educational Planning
THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

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S. Padro

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| APPENDIX B | ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS |
| APPENDIX C | SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS |
| APPENDIX D | SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS |
| APPENDIX E | AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS, INFORMATION REQUIREMENTS, AND TIMING |

PART ONE: SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS

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

ELEMENTARY PRINCIPALS' AMALGAMATED DECISION

FUNCTIONS AND TIMING
CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

A. MAIN CATEGORIES

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

2. INSTRUCTION
   2.1 Curriculum
   2.2 Instruction Budget

3. STAFF
   3.1 Staff: Hire, Terminate, Assess, Allocate
   3.2 Staff Professional Development

4. COMMUNITY RELATIONS
   4.1 Community Relations - Parents
   4.2 Community Relations - Other

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

6. TRANSPORTATION
   6.1 Transportation
B. SUB-CATEGORIES

1. STUDENTS

1.1 Student Progress/Impediments

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

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

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

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

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

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

D1,1,7 - Communicable diseases

D1,1,8 - Student welfare - do they come poorly clothed, unclean, inadequate lunches, etc.

D1,1,9 - Discipline of misbehaving students

D1,1,10 - Attendance problems

D1,1,11 - Student progress problems

D1,1,12 - Individual level adjustment

D1,1,13 - Remedial instruction useful

D1,1,14 - Enrichment useful

D1,1,15 - Special service assessment useful

D1,1,16 - Psychological problems of the students

1.2 Student Guidance

D1,2,1 - Guidance decisions for grade 8 students re grade 9 options
1.3 Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities
D1,3,2 - Student breakage
D1,3,3 - Use of school equipment by the students

2. INSTRUCTION

2.1 Curriculum

D2,1,1 - Introduction of a new programme
D2,1,2 - Philosophy and implementation, policy type decisions
D2,1,3 - What will electives (if any) be?
D2,1,4 - Assessment of an ongoing programme
D2,1,5 - Decision on old/new programme
D2,1,6 - Adjustment of programmes
D2,1,7 - Adjustment brought about to or because of D2,1,2
D2,1,8 - Areas of school concentration
D2,1,9 - Extra class learning, school activities, athletics, assemblies, etc.
D2,1,10 - Field trips, cost, transportation, etc.

2.2 Instruction Budget

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

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

D2,2,3 - Budget, once yearly material - sports equipment
D2,2,4 - Budget, once yearly material
- audio-visual
- capital equipment
- oral French
- music
- remedial & enrichment
- science supplies/equipment
- art
- novels

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

3. STAFF

3.1 Staff: Hire, Terminate, Assess, Allocate

D3,1,1 - Assessment of probationary teachers
D3,1,2 - Teacher requirements
D3,1,3 - Hiring
D3,1,4 - Assessment of permanent teachers
D3,1,5 - Placement of teachers
D3,1,6 - Supply teachers
D3,1,7 - Dismissal of teachers

3.2 Staff Professional Development

D3,2,1 - Teacher request to visit
D3,2,2 - Consultants
D3,2,3 - In-service training

4. COMMUNITY RELATIONS

4.1 Community Relations - Parents

D4,1,1 - Decisions on open houses, parent nights, interviews, comments of parents, once a term
D4,1,2 - Parental complaints, how to handle
4.2 Community Relations - Other

D4,2,1 - Facility rental

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

5. PLANT

5.1 Relations with Custodian

D5,1,1 - Supervision of custodial staff

D5,1,2 - Custodial/staff relations

5.2 Maintenance

D5,2,1 - Cases of vandalism

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

5.3 Facility Requirements

D5,3,1 - Additional classrooms

D5,3,2 - Storage needs

5.4 Fire Drill

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

6.1 Transportation

D6,1,1 - Transportation, policy normal
D6,1,2 - Transportation, winter storm procedure, decide upon
D6,1,3 - Transportation, bus breakdown
D6,1,4 - Transportation, early dismissal (non-storm)
D6,1,5 - Transportation, pupils change bus
D6,1,6 - Transportation, implementation of D6,1,2, include billeting of students whenever necessary
C. TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

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1.3 Student, Relationship to Physical Plan/Equipment

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2. INSTRUCTION

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3. **STAFF**

### 3.1 Staff, Hire, Terminate, Assess, Allocate

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4. COMMUNITY RELATIONS

4.1 Community Relations - Parents

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APPENDIX B

ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS
D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES
- registers
- master class lists
- test results
- teacher assessment
- report card
- attendance summary

D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS
- medical report
- psychological report
- special equipment
- transportation
- O.S.R.
- special Ed. report.

D 1,1,3 ASSESSMENT OF SPEECH--Who require what help
- identification characteristics file
- referral file--Confidential Report
- health record
- O.S.R.
- teacher assessment

D 1,1,3 (b) ASSESSMENT OF HEARING
- health record
- O.S.R.
- public health nurse report
- teaching prescription

D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION
- candidate list
- psychological report
- academic report
- health record
- O.S.R.
- report card
- parent's permission
D 1,1,3 (c) ASSESSMENT OF VISION
- health record
- O.S.R.
- public health nurse report
- teaching prescriptions
- teacher assessment

D 1,1,5 (a) PROMOTION OF STUDENTS
- report card (student file)
- O.S.R.
- objective and teacher tests
- recommendations--teacher

D 1,1,5 (b) PLACEMENT OF STUDENTS INTO CLASS
- standardized tests
- objective and teacher assessment
- social relationship inventory
- class list
- June promotion data

D 1,1,6 (a) ACCIDENT AND/OR SICKNESS OF STUDENTS
- telephone number of parent and/or employer
- telephone number of alternate family
- telephone number of ambulance and hospital
  choice of hospital--doctor
- list of students with special medical problems
- accident report
- insurance--list

D 1,1,6 (b) ACCIDENT AND/OR SICKNESS OF STUDENTS
- telephone number (a) parent and/or employer
  (b) alternate
- insurance--list
- medical report
- parental information
D 1,1,7  COMMUNICABLE DISEASES
- health unit data—handling the disease
- previous precaution
- medical consultation

D 1,1,8  STUDENT WELFARE
- family background—nurse
- O.S.R.
- children Aid— if involved
- teacher notification

D 1,1,9  DISCIPLINE OF MISBEHAVING STUDENTS
- O.S.R.
- teacher assessment
- behavioural file
- confidential report
- psychological report

D 1,1,10  ATTENDANCE PROBLEMS
- Board Policy
- register
- teacher report
- attendance officer telephone number
- attendance officer report

D 1,1,11  STUDENT PROGRESS PROBLEMS
- O.S.R.
- report card
- standardized test
- nurse report

D 1,1,12  INDIVIDUAL LEVEL ADJUSTMENT
- See D 1,1,1

D 1,1,13  REMEDIAL INSTRUCTION USEFUL
- O.S.R.
- report card
- standardized test
- special education recommendation
- remedial class list and waiting list
D 1,1,14 ENRICHMENT USEFUL
- O.S.R.
- standardized test
- special education recommendation
- teacher assessment and recommendation

D 1,1,15 SPECIAL SERVICE ASSESSMENT USEFUL
- teacher's assessment and report
- referrals
- O.S.R.
- report card
- health record

D 1,1,16 PSYCHOLOGICAL PROBLEMS OF THE STUDENT
- teacher assessment
- psychological reports
- O.S.R.
- medical and/or health record
- children's Aid If Involved
- Community Psychiatric Hospital-Guelph

D 1,2,1 GUIDANCE DECISIONS FOR GR. 8 STUDENTS
- data from Secondary Schools
  (Calendar)
- progress reports
- O.S.R.

D 1,3,1 POLICY ON STUDENT CARE OF FACILITIES
- Board policy
- school policy

D 1,3,2 STUDENT BREAKAGE
- Board policy
- school policy
- maintenance requisition form
D 1,3,3, USE OF SCHOOL EQUIPMENT BY THE STUDENTS
- Board Policy

D 2,1,1 INTRODUCTION OF A NEW PROGRAMME
- Cost factor
- General ability level of children and their needs
- Resources available and required
- Social implications
- Community implications

D 2,1,2 PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DIVISIONS
- Needs of the school and community
- Factors affecting the change
- Resource needed for change
- Physical requirements of the school to adapt to such a change
- Community cooperation

D 2,1,3 WHAT WILL ELECTIVES (IF ANY) BE?
- Interest of teachers
- Interest of pupils
- Facilities
- Parent involvement (community)
- Time--during day
- Economic requirements

D 2,1,4 ASSESSMENT OF ONGOING PROGRAMME
- Efforts (a) written (b) oral
- Objectives
- Resources
- Suited to individual
- Creativity
- Interest
- Use of time
- Involvement
- Skills acquired
D 2,1,5 DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR
- use of D 2,1,4, information sheet
- new situations which have developed

D 2,1,6 ADJUSTMENT OF PROGRAMME
- cost
- adaptation to physical plant
- assessment of present programme
  \((2,1,4) + (D 2,1,5)\)

D 2,1,7 ADJUSTMENT BROUGHT ABOUT TO OR BECAUSE OF D 2,1,2
- nothing extra

D 2,1,8 AREAS OF SCHOOL CONCENTRATION
- grade concentrations--numbers
- academic needs of students
- qualifications of teachers
- physical capabilities of the school plant

D 2,1,9 EXTRA CLASS LEARNING--ATHLETIC ASSEMBLIES
SCHOOL ACTIVITIES
- plant capabilities
- timetable available time in learning areas
- number of classes
- age and/or grade levels
- staff needs

D 2,1,10 FIELD TRIPS, COST, TRANSPORTATION ETC.
- objectives of trip
- length of trip
- learning activities--before after
- cost of bus
- cost of activity
- fund raising activities
- parent involvement
D 2,2,1 BUDGET, TWICE YEARLY MATERIAL--texts
  library
  consummables
  spec.ed.

  - number of pupils--regular class
  special ed.

  - special needs of teachers for special programme
  - existing supplies
  - projection of needs

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

  - number of boys
  - programme objectives as set out by teacher
  - material needed for projects
  - equipment available
  - suppliers--cost

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

  - equipment inventory
  - needs as related to proposed programme
  - projected cost factor

D 2,2,4 BUDGET ONCE YEARLY MATERIAL

  - inventory of present equipment
  - objectives of the programme
  - number of students to take part
  - replacement or new

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

  - long range plans
  - short term plans
  - number of students involved
  - suppliers--cost
D 3,1,1  ASSESSMENT OF PROBATIONARY TEACHERS
- test marks of students (compared to previous)
- test marks of students (compared to other students of same level)
- attitudes (measurable) of students
- curriculum development involvement
- professional development involvement

D 3,1,2  TEACHERS REQUIREMENTS (NO. OF)
- no. of students
- pupil/teacher ratio for county
- county policy for para-professionals
- general intellectual level of students of school area
- no. of special education classes in school
- type of programme to be operated
- type of school facilities e.g. open space

D 3,1,3  TEACHER HIRING
- educational background of applicants (degree, special courses etc.)
- teachers' college or former school rating
- advertise (type of)
- type of Information sheets to be completed by applicants
- interviewing procedure--where, when, who involved, how
- specific needs of each school
- ratio of experienced to inexperienced
- male or female
- age of applicant

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

D 3,1,5  PLACEMENT OF TEACHERS
- teacher's desire and interest
- programme requirements
- education and qualifications of teacher
- experience of teacher
- type of students
- type of facility
- type of programme with which she/he has had experience
D 3,1,6 SUPPLY TEACHERS
- experience
- qualifications
- type of programme worked in
- level preference
- previous performance

D 3,1,7 DISMISSAL OF TEACHERS
- Negative reports using D 3,1,1 or D 3,1,4 as assessment criteria
- Visits of superintendent to teacher in question will occur a number of times
  He will make written reports, seen and signed by teacher
- Numerous principal written reports will be in existence (dated and signed by teacher in question).

D 3,2,1
- reason for request
- can her class be covered (other teacher's timetable).
- how can her class be covered
- can arrangements with place to be visited be made?
- no. of previous visits

D 3,2,2 CONSULTANTS
- does principal or staff decide whether consultation
- which consultant
- for how long—when?
- type of workshop, lecture, etc.
- with other schools, single staff, division, or individual
- no. of visitations
- exact follow procedures

D 3,2,3 IN SERVICE TRAINING
- measure student progress
- measure student attitudes and interests
- measure student behaviour
- who will receive (whole staff, individual)
- in which areas e.g. subject, class management, etc.
- who will provide training
- format of training
- no sessions
DECISION ON OPEN HOUSE
(Parents Night, Interview, etc.)
- staff wishes
- parental wishes
- administration wishes
- children's wishes

PARENTAL COMPLAINTS, HOW TO HANDLE
- nature of the complaint
- whether to call the person complaining on the phone or have them come in
- the number of complaints
- if the complaint involved pupils, where they were at the time of the problem

FACILITY RENTAL
- what groups should pay for the facility and what groups should not
- how groups make application for use of facility
- procedure to follow in case of damage to facility
- rules to follow while facility is being used (e.g. use of type of footwear, school equipment, etc.)
- storage of group's equipment
- responsibility of Board in case of accident or personal injury
- who is responsible for facility while group is using it
- when the facility is available

OTHER PROBLEMS IN SCHOOL--COMMUNITY RELATIONS
- the nature of the problems with these projects
- who should represent the school in the project
- how to stimulate interest in school--community activities
- how and who deals with the complaints
- what the interest of the community is in community--school activities
D 5,1,1 SUPERVISION OF CUSTODIAL STAFF
   - work habits, notes on (i.e.--lazy)
   - recommendations
D 5,1,2 CUSTODIAL/STAFF RELATIONS
D 5,2,1 CASES OF VANDALISM
   - Board policy
D 5,2,2 MAINTENANCE, REPAIRS (by who)
   - due to vandalism
   - who to call for glass, hydro, etc.
D 5,3,1 ADDITIONAL CLASSROOMS
   - survey of subdivision
   - projected enrolment
   - teacher-pupil needs
D 5,3,2 STORAGE NEEDS
   - presently permanent
   - additions:
     1) what is there now?
     2) caretaker needs
     3) teacher/pupil supply needs
     4) order procedure (supplies)
        - once, or twice
     5) type of storage--central or dispersed
D 5,4,1 FIRE DRILL--when, etc.
   - school routines
APPENDIX C

SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS
ADJUSTMENT OF PUPILS TO CLASSES

-REGISTERS:
  Class Registration Book usually kept by class teacher during term.

-MASTER CLASS LISTS:
  PM "Class Lists" Sept. 72, Organization" - (list of students by room No.)
  PM "Teachers class lists 1972-73". - (unstandardized class lists from teacher to secretary gives name, address, tel., religion, parents' occupation.)
  PE list of class allocations - "Kindergarten (72-73).
  EG "classroom lists (72)"

-TEST RESULTS:
  PC "Marks-Report Cards;" at end of each term each teacher provides principal with class marks, then back in file until next term.
  PM "Term Report Cards and Mark Sheets (for 2 Years)." (one term per folder, 3 terms per year, copies of Individual Student Progress Report filed by class.
  PM "Standardized Tests":- (lists of student scores on various standardized tests - usually reading, Gates McGuity etc.)
  PE "Continuous Progress-Reading:" "(checklists of Kindergarten progress & achievement in level system. - skills tests now recorded by group achievement and transferred to individual record when student leaves or transfers.) See OSR folders.
  PE "Testing":- (correspondence, notes and forms re standardized tests and scoring service).
  EG "Special Test Results" (Binder File):- Gates McGuity etc. standardized tests for selected grades.
  EG "C.T.B.S." (=Canadian Test of Basic Skills):- memo from Board Office on schedule of tests 1972.
-TEACHER ASSESSMENT:-

(mainly found on "Student Achievement Form") in OSR folder - PC.

PM See above.

PE "Student Achievement Records": - "Binder file)?

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

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

-REPORT CARD-

PC (see above)

PM (see above)

-ATTENDANCE SUMMARY:-

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

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


PE: contains teacher absences, supply teachers used &

EG student inventory.

D1,1,2 STUDENTS WITH PHYSICAL HANDICAPS

- MEDICAL REPORT
-PSYCHOLOGICAL REPORT
-SPECIAL EQUIPMENT
-TRANSPORTATION
-OSR
-SPECIAL Ed. REPORT
-MINOR ALLERGIES -

Presumably kept by the nurse or therapists concerned.

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

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

D1,1,3 ASSESSMENT OF SPEECH

-IDENTIFICATION CHARACTERISTICS FILE

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

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

PC Principals' personal binder files "Confidential Special Ed., students 'test results etc."
maintained by visiting specialists. PE, PM, EG. "Special Services Log." - current student lists for students undergoing therapy, under investigation, review, dismissals, referrals.

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

PE Principals anecdotal File - Pupils.

-HEALTH RECORD:- In nurses files.

-OSR:- O.K.

-TEACHER ASSESSMENT:-

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

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

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

D_1,1,3_ ASSESSMENT OF HEARING:

-HEALTH RECORD:- Nurses Files.

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

-PUBLIC HEALTH NURSE REPORT:- Nurses Files?

-TEACHING PRESCRIPTION:- Special Services Log (see PM above)

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

D_1,1,4_ WHO ENTER SPECIAL ED OR PRE-OCCUPATION: (This is not primarily the Principals' Decision)

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

PM Special Education":- list of applicants being "-Pre-occ. Nomination" considered for Pre-Occ. programs (standard board form)
PM, EG, PE. "Special Services Log": Special & Remedial class Lists.

-PSYCHOLOGICAL REPORT:-

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

-ACADEMIC REPORT:-

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

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

PE Binder File "Student Achievement Records".

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

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

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

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

D₁₁₃ (c) ASSESSMENT OF VISION

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

D₁₁₅ (a) PROMOTION OF STUDENTS (Not too applicable in continuous Progress Environment except for Gr. 8).

-REPORT CARD (STUDENT FILE) - PC, PM. see above
-OBJECTIVE AND TEACHER TESTS:- PC on OSR folder. (space for standardized tests)

PC, PM. Term Reports & Mark Sheets.

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

PE "Student Achievement Records" binder.

EG "Special Test Results" - Gates-McGuity etc. standardized tests for selected grades.
- RECOMMENDATIONS-TEACHER

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

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

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

- AWARDS:

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

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

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

"CLASS LISTS" - see above.

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

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

- OBJECTIVE AND TEACHER ASSESSMENT -

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

PE. "Student Achievement Records" binder.

PE. Skills test booklets.

- SOCIAL RELATIONSHIP INVENTORY - Nothing

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

- JUNE PROMOTION DATA - PC. "Grade 8 - Promotion lists"

PM. "Promotion Sheets". Gr. 8 Promotion to CDSS Also names & comments on special learning difficulty pupils.

EG. "Promotion Reports 1972" - (see above) - also shown on C.R folder.

- CURRENT REGISTRATION DATA (Particularly Kindergarten)

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

EG.PE. "Kindergarten (72-73): registration slips, list of class allocations.

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

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

D 1.1.6 (a) ACCIDENT AND/OR SICKNESS OF STUDENTS.
(Emergency).

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

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

- TELEPHONE NO. OF ALTERNATE FAMILY -

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

- TELEPHONE NO. OF AMBULANCE & HOSPITAL -

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

- CHOICE OF HOSPITAL-DOCTOR -

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

- LIST OF STUDENTS WITH SPECIAL MEDICAL PROBLEMS -

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

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

- ACCIDENT REPORT -

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

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

  EG. "Student Accident Records & Policy" - as above
- INSURANCE - LIST - PC. "Insurance" - student policies & list of those covered.
  + accident claims forms.
  + blank insurance application forms.

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


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

D,1,6 (b) ACCIDENT AND/OR SICKNESS OF STUDENTS:- (RESULTS FROM)

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

- INSURANCE LIST - as in (a) above.

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

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

- "HOME INSTRUCTION"-
  PC. Blank Request forms. (rarely used)
  PM. Summary of time allocated to Home Instruction (1970) + costs for tutoring & transportation
  EG. Current request forms (completed) for H.I. plus records of time spent thereon.

- CORRESPONDENCE WITH INSURERS-
  EG. matters arising from accident claims, principal acting for parents usually.

D,1,7 - COMMUNICABLE DISEASES -

- HEALTH UNIT DATA - HANDLING THE DISEASE -

- PREVIOUS PRECAUTION

- MEDICAL CONSULTATION

(no information found in files)
STUDENT WELFARE:

- FAMILY BACKGROUND - NURSE

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

  PE Background notes on one particular student

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

- CHILDREN'S AID - IF INVOLVED:

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

  EG. "Words of children's Aid Society" - list of students applicable.

- TEACHER NOTIFICATION:

  Nothing recorded.

- "WATER EXAMINATION REPORT":

  EG. Certificates of school water supply satisfactories

- "NUTRITION REPORT -

  EG Nutritive value of chocolate milk report.

- "DENTAL HEALTH EDUCATION"

  EG Curriculum guide for program in dental health.

- DRUG ABUSE INFORMATION:

  EG. Pamphlets on use & abuse of various drugs.

DISCIPLINE OF MISBEHAVING STUDENTS.


- TEACHER ASSESSMENT:

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

- BEHAVIOURAL FILE:

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

PE. See above.

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

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

-DIAGNOSTIC GUIDE: -

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

-RULES OF CONDUCT: -

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

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

-INFRONCTIONS AND PUNISHMENTS FILE: -

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

D1,1,10 ATTENDANCE PROBLEMS

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

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

-TEACHER REPORT -

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

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

-ATTENDANCE OFFICER REPORT: -

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

ATTENDANCE PATTERN - EG. Summary of absenteeism for selected students.
- LATE SLIPS – 68. Blank forms for sending to parents as warning re repeated lateness.

STUDENT PROGRESS PROBLEMS:

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

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

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

- NURSE REPORT – Nurses Files?

- EXPECTED ACHIEVEMENT LEVELS –

  PE.PC. "Reading Program" – includes Gates reading survey, literature on pre-reading achievement and how acquired.

  PE. Diagnostic advice to teachers.

- TEACHERS ASSESSMENT –

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

INDIVIDUAL LEVEL ADJUSTMENT

See D1,1,1

REMEDIAL INSTRUCTION USEFUL

(See Central Office, Special Ed. files and forms)

- O.S.R. – O.K.

- REPORT CARD – (see D1,1,11 above).

- STANDARDIZED TEST –
  (see D1,1,11 above + Special services Logs) PM.PE.EG.
-SPECIAL EDUCATION RECOMMENDATION -

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

PE Requests for "individual examination by specialist"

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

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

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

-REMEDIAL CLASS LIST AND WAITING LIST.

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

- also those under review.

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

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

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

D₁,₁,₁₄ ENRICHMENT USEFUL.

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

D₁,₁,₁₅ SPECIAL SERVICE ASSESSMENT USEFUL.

-TEACHER'S ASSESSMENT AND REPORT -

PE. "Special Education" - current copies of "Request for Individual Examination by Specialist" forms.

-REFERRALS - (Special Services Logs.)

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

-REPORT CARD - (See D₁,₁₁₁)

-HEALTH RECORD - (Nurses Files)
- CORRESPONDENCE WITH CONSULTANTS - PC.PM.

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

D 1,1,16 PSYCHOLOGICAL PROBLEMS OF THE STUDENT.

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

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

-O.S.R. O.K.

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

-CHILDREN'S AID IF INVOLVED -
  EG. "Wards of Children's Aid Society" - list of students
  EG. Catholic Children's Aid Society - Psychological Reports

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

-PRINCIPAL'S CONFIDENTIAL FILES -
  PM. "Confidential Reports":- From principal to board consultants.
  PE. "Principals' Anecdotal File" - notes re students needing his special attention, eg. discipline or emotionally disturbed.
  PE. File on an individual student with a behavioural problem. Includes notes, reports on interviews with teacher, parents, etc.
  EG. "confidential" - includes variety of correspondence re disturbed students.

-CHECKLIST FOR IDENTIFICATION OF EMOTIONALLY DISTURBED CHILDREN.
  PE. "Aids for Teachers":- includes a checklist for the identification of emotionally disturbed children.
D1,2,1 GUIDANCE DECISIONS FOR GR. 8 STUDENTS

-DATA FROM SECONDARY SCHOOLS-

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

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

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

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

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

-PROGRESS REPORTS ) as described previously.

-OSR

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

-TEACHERS RECOMMENDATIONS -

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

-GUIDANCE LITERATURE -

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

D1,3,1 POLICY ON STUDENT CARE OF FACILITIES

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

D1,3,2 STUDENT BREAKAGE:

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

D1,3,3 USE OF SCHOOL EQUIPMENT BY THE STUDENTS

-BOARD POLICY - Principal's Board Policy Manual.
INTRODUCTION OF A NEW PROGRAMME

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

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

-RESOURCES AVAILABLE AND REQUIRED -
  (For Inventories of existing equipment held and supplies see under INVENTORY D2,2,4)

For Resources required:-
  PC. "Reading Program," - order forms for texts.
  PE. "Art":- outline of elementary Art program with suggested classroom equipment and supplies.
  PE.PE. "Science Curriculum" (see above in cost factor).

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

-SOCIAL IMPLICATIONS - nothing filed.

-COMMUNITY IMPLICATIONS -

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

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

-BOARD CURRICULUM COMMITTEES' REPORTS -
  PM. "Curriculum Committees etc." - membership lists, addresses, notices of meetings.
  PE. "Curriculum Development":- literature re local curriculum development.
  PE. "Curriculum Committee Reports:" - set of minutes of a meeting.
  PE. "Science Curriculum":- includes science curriculum Committee minutes and inventory of equipment needed.
  PE. "Science":- science teacher's correspondence re curriculum development.
PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DECISIONS

-NEEDS OF THE SCHOOL AND COMMUNITY -

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

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

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

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

-FACTORS AFFECTING THE CHANGE -

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

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

-RESOURCE NEEDED FOR CHANGE -

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

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

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

-COMMUNITY COOPERATION - mainly circulars informing parents of changes.

-RESEARCH FINDINGS & REPORTS OF CURRICULUM COMMITTEES. -

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

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

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

-GENERAL CURRICULUM GUIDELINES & DIRECTION -

Curriculum guides, notes, papers, etc. re various programs e.g. Art, Maths, Music, Lang. Arts, Science. Also more general directions for program development, i.e. objective setting, testing, curriculum planning 'for teachers and curriculum committees' use).
WHAT WILL ELECTIVES (IF ANY) BE?

-INTEREST OF TEACHERS -

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

-INTEREST OF PUPILS -

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

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

-FACILITIES -

-PARENT INVOLVEMENT (COMMUNITY) - EG. PM. "Parent-Teachers Aid," =

-TIME DURING DAY -

PC. "Timetables" :- All schools have teachers' timetables available.

-ECONOMIC REQUIREMENTS:- nothing found.

ASSESSMENT OF ONGOING PROGRAMME

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

-OBJECTIVES:-

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

similarly

EG "Language Arts", EG. "Reading Program"

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

-RESOURCES -

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

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

PM. "Equipment: Capital & Replacement Requests 1969": - now mostly obsolete except to answer such questions as, how old is the typewriter?
PM. "Film strips, records, etc.":- list of films reviewed (mostly 1969).

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

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

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

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

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

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

Also evaluation slips for films viewed.

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

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

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

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

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

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

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

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

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

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

PC "Audio-Visuals" - correspondence & Advertising from Film Suppliers.

PC "Supplies":- Summary of capital requisitions + set of consumable order forms, e.g. for paper, plasticene, newsprint paint.
59. "Instructional Supplies"—forms supplied to teachers for them to indicate class supply requirements (from catalogues). These are collected by vice-principal, aggregated and sent to central office.

For teachers considered as programme resources, see D\textsubscript{1,1,2} for lists, evaluations, etc.

-SUITED TO INDIVIDUAL -

PE. "class profiles:"—from teachers to principal, problems of a group or individual nature.

-INTEREST-

-USE OF TIME - PE. PM. PC. "Timetables:"—one per teacher.

PE. "Home Instruction:"—summary of time spent on Home Instruction in 1970.

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

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

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

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

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

PE Student Achievement records:-

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

PE See INVOLVEMENT above.

- PRE-PROGRAMME ACHIEVEMENTS -

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

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

D\textsubscript{2,1,5} DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR

- USE OF D\textsubscript{2,1,4} INFORMATION SHEET — We have not found such a sheet anywhere.

- NEW SITUATIONS WHICH HAVE DEVELOPED -

PM "Additions to School"—progress of present buildings and plans; Proposed uses of additional space.
- ADVICE OF REGIONAL PROGRAMME CONSULTANTS -

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

- TEACHERS' COURSE OUTLINES/PLANS

PE Informal submissions of long range plans from some teachers.

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

ADJUSTMENT OF PROGRAMME

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

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

- ADAPTATION TO PHYSICAL PLANT

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

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

- ASSESSMENT OF PRESENT PROGRAMME -

No summary of the disaggregated data described in D\textsubscript{2,1,5} and D\textsubscript{2,1,4}

- ADAPTATION OF TEACHER TIME -

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

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

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

    Also for newly hired teachers:

    PC. "Teacher Applications":- Copies of board "Teacher Interview
    Forms
    - principals confidential report on applicants who had been interviewed

"Teacher Information"

PM.EG. "Summary of Resource Personnel":- list of teachers' specialists.
- ALTERNATIVE INSTRUCTIONAL MATERIALS - (e.g. lists and catalogues of films, textbooks, equipment, etc.)

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

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

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

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

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

- COMMUNICATION OF SCHOOL CONCERNED POLICY TO PARENTS, TEACHERS, STUDENTS

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

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

   EG PE "Letter to Parents - Level system":

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

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

D$_{2,1,8}$ AREAS OF SCHOOL CONCENTRATION

- GRADE (OR YEAR) CONCENTRATIONS - NUMBERS -

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

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

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

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

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

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

- ACADEMIC NEEDS OF STUDENTS -

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

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

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

- QUALIFICATIONS OF TEACHERS -

Main source is Teacher Record Cards file (see D2,1,6 (ADAPTATION TO SKILLS....) and September Reports

PC.PM.PM.PE.EG.

- PHYSICAL CAPABILITIES OF SCHOOL PLANT -

PM "Floor Plan of School" PE "School Map".

PM "Resource Centre":- Description of new library and resources available

PE "Rated capacity of each School":-

D2,1,9 EXTRA CLASS LEARNING - ATHLETIC ASSEMBLIES ETC.

- PLANT CAPABILITIES: -

PC "Swimming" - receipts for rental of pool

PM "Floor Plan" of school.

PM "Hockey Rules & schedules":-rental of rink correspondence.
- TIMETABLE AVAILABLE TIME IN LEARNING AREAS -

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

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

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

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

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

PE "Hockey":- inter-school schedules

PE "Playday 1971":- schedule

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

PE "Sports Rules":- Field day program

PE "Spring Concert" (72):- Programme

PE "Track & Field":- schedules

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

EG "Fall Fair-Orangeville": programmes

EG "Field Day Information":- timetable of events

EG "Playday":- old programmes for playday.

- NUMBER OF CLASSES:-
- AGE AND/OR GRADE LEVELS:-

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

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

- STAFF NEEDS (& ASSIGNMENTS):-

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

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

PE "Routines":- Booklet for opening week - general information for teachers on opening day.
- RESOURCE LITERATURE ON EXTRA-CLASS ACTIVITIES -

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

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

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

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

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

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

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

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

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

- OBJECTIVES OF TRIP:-

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

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

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

- PARENT INVOLVEMENT -

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

- WHO WENT WHERE?

PC Who went where last year - student lists.
- CORRESPONDENCE & LITERATURE ON POTENTIAL EXCURSIONS

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

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

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

PE "Ontario Science Centre": promotional literature from OSC

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

- schools own programme of field trips.
- memos from ODSS re the 'See Dufferin first' project.

D,2,1 BUDGET, TWICE YEARLY MATERIAL (TEXTS, LIBRARY, CONSUMMABLES, SPEC. ED.)

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

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

- SPECIAL NEEDS OF TEACHERS FOR SPECIAL PROGRAMME -

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

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

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

- EXISTING SUPPLIES -

PC "Supplies": summary of capital requisitions NOV 71

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

Also Quantity, ITEM, purchase date, original cost, of classroom equipment.
EG. PM. "Budget - Supplies & Texts (consumable)" - Computer printout from board giving school's monthly expenditure and remaining budget funds.

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

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

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

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

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

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

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

- PROJECTION OF NEEDS -

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

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

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

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


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

- ACCOUNTING -

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

D_2,2,2 BUDGET TWICE YEARLY MATERIALS/INDUSTRIAL ARTS.

Nothing found.
D,213 BUDGET ONCE YEARLY MATERIAL - SPORTS EQUIPMENT

- EQUIPMENT INVENTORY -

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

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

- NEEDS AS RELATED TO PROPOSED PROGRAMME -

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

- PROJECTED COST FACTOR -

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

  PM, etc. Equipment catalogues, giving prices.

D,214 BUDGET ONCE YEARLY MATERIAL

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

- INVENTORY OF PRESENT EQUIPMENT -

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

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

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

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

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

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

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

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

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

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

- PROFESSIONAL DEVELOPMENT INvolvEMENT -

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

- TEACHERS SELF APPRAISAL OF CLASS PROCEDURES.

  PM. Standard school form, probably obsolete.
- REPORT ON PROBATIONARY TEACHER (Board Forms). G.31

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

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

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

PE. Principals' Anecdotal File - Teachers.

- PRINCIPAL'S REPORT ON CLASSROOM VISITATION -

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

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

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

-D*3,11 ASSESSMENT OF PRACTICE TEACHERS.

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

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

D2,2,5 BUDGET, WEEKLY MATERIAL - HOME ECONOMIC:

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

But add:-

EG. PM. "Petty Cash: 72-73" - record of expenditures ($50 float) - monthly
statements to board -

EG. EG. "(Milk) Account":- receipts and cheques from Diary for student milk.

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

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

D3,1,1 ASSESSMENT OF PROBATIONARY TEACHERS & ASSESSMENT OF PRACTICE TEACHERS

- TEST MARKS OF STUDENTS (COMPARED TO PREVIOUS) -

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

PM. "Standardized Tests":- lists of student scores on various tests -
usu. reading.
EG. "Special Test Results": - standardized tests Gr. 4-7.

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

- particular standard tests:

- ATTITUDES (OBSERVABLE MEASURABLE) OF STUDENTS -

PE. Principals anecdotal file:-

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

-CURRICULUM DEVELOPMENT INVEOLVEMENT -

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

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

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

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

- OBJECTIVES OF THE PROGRAMME - see D2,1,4.

- NUMBER OF STUDENTS TO TAKE PART -

REPLACEMENT OR NEW -

This information could be obtained from current requisition forms, PC, PM, and Inventories, invoices etc.

Plus PM. "Equipment: Capital & Replacement Requests "1969":

- Now obsolete except for references such as how old is typewriter?"

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

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

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

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

EG. PE. "Maintenance - Budget" etc.: - Maintenance Budget requests - Capital Items.
EG.PE. "Requisitions (72-73)":- Current requisition forms from teachers - i.e., for JAN 73.

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

- SCHOOL BANK ACCOUNT (YEARLY STATEMENT) -

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

SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS
<table>
<thead>
<tr>
<th>Decision No.</th>
<th>Decision: give a name and a brief description</th>
<th>Frequency</th>
<th>Time of Year</th>
<th>Area of decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>What courses to list on the option sheet</td>
<td>once a year</td>
<td>Jan</td>
<td>Curricula</td>
</tr>
<tr>
<td>2</td>
<td>What format of option sheet</td>
<td>once a year</td>
<td>Fall</td>
<td>Curricula</td>
</tr>
<tr>
<td>3</td>
<td>What courses to offer when results of option sheets are known</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
</tr>
<tr>
<td>4</td>
<td>How many sections of each course to offer</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
</tr>
<tr>
<td>5</td>
<td>What rooms to assign to each course</td>
<td>once a year</td>
<td>Mar</td>
<td>Facilities</td>
</tr>
<tr>
<td>6</td>
<td>What teachers should be hired, based on teacher-pupil ratio</td>
<td>once a year</td>
<td>Mar</td>
<td>Recruitment</td>
</tr>
<tr>
<td>7</td>
<td>How many times to advertise each position</td>
<td>as needed</td>
<td>March - June</td>
<td>Recruitment</td>
</tr>
<tr>
<td>8</td>
<td>What ratio of teacher to paraprofessionals to fill teacher-pupil ratio</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
</tr>
<tr>
<td>9</td>
<td>How many classes should each teacher teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
</tr>
<tr>
<td>10</td>
<td>How many classes should Department Heads teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
</tr>
<tr>
<td>11</td>
<td>How many classes should Program Supervisor teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
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<tr>
<td>12</td>
<td>How many classes should Vice Principal teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
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<tr>
<td>13</td>
<td>How many classes should Chairman teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
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<td>14</td>
<td>How many classes should Assistant Department Head teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
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<tr>
<td>15</td>
<td>How many classes should Principal teach</td>
<td>once a year</td>
<td>Feb</td>
<td>Curricula</td>
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<tr>
<td>16</td>
<td>What classes each Vice Principal is responsible for discipline and attendance</td>
<td>once a year</td>
<td>June</td>
<td>Attendance</td>
</tr>
<tr>
<td>Decision</td>
<td>Description</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Area of Decision</td>
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<td>------------------------------------------------------------------------------</td>
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<tr>
<td>17</td>
<td>What classes is Principal responsible for discipline and attendance</td>
<td>once a year</td>
<td>June</td>
<td>Attendance</td>
</tr>
<tr>
<td>18</td>
<td>What subjects belong to each area of study</td>
<td>once a year</td>
<td>Spring</td>
<td>Curriculum</td>
</tr>
<tr>
<td>19</td>
<td>What should the format of course description booklet be</td>
<td>once a year</td>
<td>Fall</td>
<td>Curriculum</td>
</tr>
<tr>
<td>20</td>
<td>How many parents night should there be</td>
<td>once a year</td>
<td>Sept</td>
<td>Public Relations</td>
</tr>
<tr>
<td>21</td>
<td>Should there be a dress code for the school, for students</td>
<td>once a year</td>
<td>June</td>
<td>Student Service</td>
</tr>
<tr>
<td>22</td>
<td>Should there be a dress code for the teachers</td>
<td>once a year</td>
<td>June</td>
<td>Public Relations</td>
</tr>
<tr>
<td>23</td>
<td>Should attendance be compulsory for those over 16</td>
<td>once a year</td>
<td>June</td>
<td>Attendance</td>
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<tr>
<td>24</td>
<td>Should attendance be compulsory for those over 18</td>
<td>once a year</td>
<td>June</td>
<td>Attendance</td>
</tr>
<tr>
<td>25</td>
<td>Should classes be cancelled if teachers are absent</td>
<td>once a year</td>
<td>June</td>
<td>Attendance</td>
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<tr>
<td>26</td>
<td>Should Department Heads have autonomy on assigning classes to teachers</td>
<td>once a year</td>
<td>June</td>
<td>Profession</td>
</tr>
<tr>
<td>27</td>
<td>Should Department Heads have autonomy in curriculum</td>
<td>once a year</td>
<td>June</td>
<td>Profession</td>
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<tr>
<td>28</td>
<td>Should Department Heads have autonomy on field trips</td>
<td>once a year</td>
<td>June</td>
<td>Profession</td>
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<tr>
<td>29</td>
<td>What budget requirements should be submitted</td>
<td>once a year</td>
<td>Fall</td>
<td>Budget</td>
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<tr>
<td>30</td>
<td>What should be the ratio of capital to supplies budget</td>
<td>once a year</td>
<td>Fall</td>
<td>Budget</td>
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<tr>
<td>31</td>
<td>How should the budget be divided by department</td>
<td>once a year</td>
<td>Jan</td>
<td>Budget</td>
</tr>
<tr>
<td>32</td>
<td>Should Department Heads have autonomy on the budgets</td>
<td>once a year</td>
<td>June</td>
<td>Budget</td>
</tr>
<tr>
<td>Assignment No.</td>
<td>Decision: give a main and a brief description</td>
<td>Frequency</td>
<td>Fix of Year</td>
<td>Area of Decision</td>
</tr>
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<td>---------------</td>
<td>-----------------------------------------------</td>
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</tr>
<tr>
<td>Decision 33</td>
<td>When decisions are made by Senior Administration which you don't approve, when should you; (i) ignore (ii) follow without discussion (iii) protest mildly (iv) protest vigorously (v) blow your stack</td>
<td>as they occur</td>
<td>Personnel</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Should you have examinations</td>
<td>once a year</td>
<td>June</td>
<td>Curriculu</td>
</tr>
<tr>
<td>35</td>
<td>How often should you have examinations</td>
<td>once a year</td>
<td>June</td>
<td>Curriculu</td>
</tr>
<tr>
<td>36</td>
<td>When should you have examinations</td>
<td>once a year</td>
<td>June</td>
<td>Curriculu</td>
</tr>
<tr>
<td>37</td>
<td>Should evaluations be left to the Department Heads</td>
<td>once a year</td>
<td>Sept</td>
<td>Curriculu</td>
</tr>
<tr>
<td>38</td>
<td>Should there be promotion meetings</td>
<td>once a year</td>
<td>Spring</td>
<td>Curriculu</td>
</tr>
<tr>
<td>39</td>
<td>What should the promotion policy be</td>
<td>once a year</td>
<td>Spring</td>
<td>Curriculu</td>
</tr>
<tr>
<td>40</td>
<td>Should teachers be at school during examinations if they are not presiding</td>
<td>once a year</td>
<td>Fall</td>
<td>Personnel</td>
</tr>
<tr>
<td>41</td>
<td>Should summer school be encouraged</td>
<td>once a year</td>
<td>June</td>
<td>Curriculu</td>
</tr>
<tr>
<td>42</td>
<td>Should free time for students be encouraged</td>
<td>all year</td>
<td>Attendance</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Who should be given permanent contracts</td>
<td>once a year</td>
<td>Spring</td>
<td>Personnel</td>
</tr>
<tr>
<td>44</td>
<td>Who should be fired</td>
<td>once a year</td>
<td>Spring</td>
<td>Personnel</td>
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<tr>
<td>45</td>
<td>Who should build the time-table</td>
<td>once a year</td>
<td>Fall</td>
<td>Facilitie</td>
</tr>
<tr>
<td>46</td>
<td>Where should computer assistance be purchased</td>
<td>once a year</td>
<td>Fall</td>
<td>Facilitie</td>
</tr>
<tr>
<td>47</td>
<td>Should students be allowed to change or drop courses</td>
<td>once a year</td>
<td>June</td>
<td>Curriculu</td>
</tr>
<tr>
<td>48</td>
<td>Should school participate in sports</td>
<td>once a year</td>
<td>Spring</td>
<td>Ext. Curr.</td>
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<tr>
<td>Decision</td>
<td>Area of decision</td>
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<td>49. What sports should school participate in</td>
<td>Ext. Cur:</td>
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<tr>
<td>50. Can time be taken off class for an extra curricular activity</td>
<td>Ext. Cur:</td>
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<tr>
<td>51. Should the buses be called because of a snow storm</td>
<td>Transportation</td>
<td></td>
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<tr>
<td>52. When should there be a fire drill</td>
<td>Facilities</td>
<td></td>
<td></td>
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<tr>
<td>53. When should there be an assembly</td>
<td>Student Service</td>
<td></td>
<td></td>
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<tr>
<td>54. How many school dances are allowed</td>
<td>Curricula</td>
<td></td>
<td></td>
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<tr>
<td>55. When should Commencement be held</td>
<td>Curricula</td>
<td></td>
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<tr>
<td>56. What should be the format of the Commencement</td>
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<td>57. Should approval from the Ministry be obtained for a course</td>
<td>Curricula</td>
<td></td>
<td></td>
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<tr>
<td>58. Should approval from the Ministry be obtained for a textbook</td>
<td>Curricula</td>
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<tr>
<td>59. How much autonomy should be given Department Heads for curriculum</td>
<td>Curricula</td>
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<tr>
<td>60. How much autonomy should be given the Librarian</td>
<td>Curricula</td>
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<tr>
<td>61. Should the library be opened at night</td>
<td>Student Services</td>
<td></td>
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<td>62. What procedures should be used for visitors to the school</td>
<td>Student Services</td>
<td></td>
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<tr>
<td>63. What Home Room system should be used</td>
<td>Student Services</td>
<td></td>
<td></td>
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<tr>
<td>64. How should attendance be marked</td>
<td>Attendance</td>
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<tr>
<td>Decision</td>
<td>How much say should the Department Heads have in selection of teachers</td>
<td>once a year</td>
<td>Spring</td>
<td>Recruiting</td>
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<td>---------------------------------------------------------------------</td>
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</tr>
<tr>
<td>66</td>
<td>How many sections should there be and what should each do? This is under guidelines.</td>
<td>once a year</td>
<td>Personnel</td>
<td></td>
</tr>
<tr>
<td>67</td>
<td>How should professionals be developed</td>
<td>various times</td>
<td>Professors Development</td>
<td></td>
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<tr>
<td>68</td>
<td>When should equipment be done</td>
<td>as needed</td>
<td>Professors Development</td>
<td></td>
</tr>
<tr>
<td></td>
<td>What inserts should take place as needed</td>
<td>Professors Development</td>
<td></td>
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<td></td>
<td>What duties should teachers do</td>
<td>once a year</td>
<td>Spring</td>
<td>Personnel</td>
</tr>
<tr>
<td>71</td>
<td>Who should run the school</td>
<td>once a year</td>
<td>June</td>
<td>Personnel</td>
</tr>
<tr>
<td>72</td>
<td>When should equipment be used</td>
<td>once a year</td>
<td>June</td>
<td>Facilities</td>
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<tr>
<td>73</td>
<td>When should the principal be sent to visit another school?</td>
<td>as needed</td>
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<tr>
<td>74</td>
<td>Should student pass a lower level successfully and move on to a more difficult course?</td>
<td>once a year</td>
<td>June</td>
<td>Curriculum</td>
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<tr>
<td>75</td>
<td>Should staff be aware of things like budget, planning, board policies, etc., or should the principal be the leader they know is better?</td>
<td>once a year</td>
<td>Anytime</td>
<td>Personnel</td>
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<td>76</td>
<td>Should the principal meet with the Student Council?</td>
<td>once a year</td>
<td>June</td>
<td>Student Services</td>
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<td>77</td>
<td>Should the principal send for the County in the Ship?</td>
<td>once a year</td>
<td>Sept</td>
<td>Curriculum</td>
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<tr>
<td>78</td>
<td>What recommendations go to the Senior Administration accounting or buying capital equipment?</td>
<td>once a year</td>
<td>Fall</td>
<td>Facilities</td>
</tr>
<tr>
<td>Decision</td>
<td>Question/Policy</td>
<td></td>
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<tr>
<td>11</td>
<td>What supervision of teachers policy should be followed</td>
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<tr>
<td>51</td>
<td>What policy changes should be recommended to senior administration</td>
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<tr>
<td>81</td>
<td>When should staff meetings be held</td>
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<tr>
<td>82</td>
<td>What committees should be appointed for non-teaching staff</td>
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<td>83</td>
<td>What salaries should be recommended for non-teaching staff</td>
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<tr>
<td>84</td>
<td>What salary increases should be requested for Principals</td>
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<tr>
<td>85</td>
<td>What innovations should be pursued</td>
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<tr>
<td>86</td>
<td>Should all students write final exams</td>
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<tr>
<td>87</td>
<td>Who should write final examinations</td>
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<tr>
<td>88</td>
<td>If a student requests an examination, should he/she receive credit for the course</td>
<td></td>
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<tr>
<td>89</td>
<td>What should be the first day of school</td>
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<tr>
<td>90</td>
<td>How much authority should be delegated to the head secretary</td>
<td></td>
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<tr>
<td>91</td>
<td>Should the school be open for 12 months of the year</td>
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<tr>
<td>92</td>
<td>Should a semester or trimester system be operated</td>
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<tr>
<td>93</td>
<td>What parking arrangements should be made for students</td>
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<tr>
<td>94</td>
<td>Who should have keys to the school and each area in the school</td>
<td></td>
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</tr>
<tr>
<td>95</td>
<td>How long should the periods be</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
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<td>How should lockers be issued to students</td>
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Name: D. G. Anderson  
Title: Principal

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<td>Changes in curriculum--course outlines to be used, new subjects to be offered</td>
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<td>Stud. Ser.</td>
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Name: D. Anderson
Title: Principal
Name:  D. E. Anderson
Title:  Principal

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APPENDIX E

AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS,
INFORMATION REQUIREMENTS AND TIMING

PART ONE: SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS

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

SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS
SECONDARY PRINCIPALS' INFORMATION REQUIREMENTS

DECISION

1. ORGANIZATION

A. To Open School

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

5. Student projections

6. Scheduling of exams

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

INFORMATION

Timetabling, Reporting, Recordkeeping

Recordkeeping - student achievement form (OSR)
   - student info sheet
   - courses

Dept. of Ed. - on tape/P.O. to school

Access frequency - updates ANA
   - sometimes from Board, i.e., non-resident list

Budget - from D of E.

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

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

Occupation recommendation - processed by Rogers - none at Center Duff. - decision based on availability of space at Orangeville.

Option sheets sent to elem.

Mfg. of feeder principals to get

Also pick-up info on migrants

Registration also in early Sept.

Info summarized for Board in connection with staffing (mfg. with Dir.)

Some projections from Board

Exam schedule compatible with other high school.

See 1A5
6. Ratio of Teachers to paraprofessionals

9. Who should build timetables?

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

B. Timetables

1. Exams, timetable.
2. Student handbook
3. List on option sheets - what is its format
4. Pupil course requirements
5. What courses to offer (includes study of econ. feasibility)?
6. How many sections per course, includes study of econ. fees?

C. Lockers

1. Method of locker distribution.

D. Home Room

1. What Home Room system.

E. Text Books

1. Method of Handling textbooks (distr.)
2. Method of handling textbooks (collection)

P-T ratio conformity (economics)
May require Bd. or Ministry approval (admin. council)
Family life/religion
Originates from Dept. Head, on option sheet, decision to go ahead depends on response

Teachers timetables submitted to Board for info - arranging visits, etc.

Some politics involved.
Counts ½-teacher & must conform to fit ratio
Salaries on ind. basis, discussed with Director
Principals' perogative.

Textbooks - "caution fee", money to Board or book rental fee.
2. DECISIONS

A. Budget

1. Budget requirements to be submitted.

2. Best ratio of capital to supplies.


4. Allocation of budget (to departments)

5. Review of budget spending

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

7. Maintenance of facilities.

B. Curriculum

1. Autonomy of Dept. Head re field trips

2. Changes in curriculum, modify outlines

3. Field trips

4. Approval of courses, get from Ministry

5. Approval of textbooks, get from Ministry

INFORMATION

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

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

Principals generally make decision based on advice from accts.

Monthly expense sheets from Board (prepared by EDP)

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

Ratio interval, total $ value important.

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

To supervisor of plant, industrial plant improvements

Included in maintenance budget

Informal request, perhaps memo, more often oral

Field trip (Form) - copy to Board

From Dept's budget (in supply budget)

See 2B1

Form from Director to Ministry

Form from Director to Ministry
C. Promotion

1. Should students be given a credit in lower level if unsuccessful at upper?
2. Should students be allowed to change/drop courses?
3. Promotion decisions.

STAFF

A. Hiring-Firing

1. Who should be fired?
2. Who should be given a permanent contract?
3. Hiring procedure.
4. How many secretaries (based on board guidelines)?
5. Salary of non-professional people.

B. Authority

1. How much autonomy do dept. Heads have in spending money?
2. How much autonomy to librarian.
3. How much say should Dept. Heads have in teacher selection.
4. Who should have keys to the school and what areas of the school.
5. How much authority delegated to head secretary.

C. Duties

1. Duties of paraprofessionals.

D. Promoting

1. Should all students write finals, who should write?
2. Pass final - gets credit?
3. Have promotion meetings.
4. What promotion policy.
5. Should there be exams?
6. How often should there be exams?
DECISIONS

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

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

INFORMATION

County budget (superintendents)
Request to superintendents (form)
(occasionally request from officials for teacher to attend conference)

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

4. PARENTAL & EXTRA CURRICULAR
STUDENT CONTROL + EXTRA CURRICULAR

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

Board policy.
Selling campaigns - discussed with Director
Attendance violations to attend social social counsellor.
See above.
4. PARENTAL & EXTRA CURRICULAR

STUDENT CONTROL + EXTRA CURRICULAR

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

12. Student assemblies.

Parents Night

13. How many parents nights?

14. Use of facilities.

Comment

15. Commencement arrangements

5. ONE SHOT DECISIONS

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

Parent-advisory committee - by Board.
Board policy
Requires school approval
Requests from Board office, school approval
Permit to caretakers
PART TWO

SECONDARY PRINCIPALS' DECISIONS

(STANDARDIZED) AND TIMING
CLASSIFICATION OF SECONDARY PRINCIPALS' DECISIONS

A. MAIN CATEGORIES

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

2. INSTRUCTIONAL PROGRAM
   2.1 Curriculum
   2.2 Budget
   2.3 Exams/Provisions
   2.4 Non-regular events, library

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

4. COMMUNITY RELATIONS
   4.1 Relations with Parents
   4.2 Use of Facilities

5. PLANT
   5.1 Plant

6. TRANSPORTATION
   6.1 Transportation
B. SUB-CATEGORIES

1. STUDENTS

1.1 Student Progress/Promotion/Courses

D1,1,1 - Exams, Timetable

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

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

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

D1,1,5 - Promotion decisions

1.2 Student Relations

D1,2,1 - Commencement arrangements (A)

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

D1,2,3 - Student handbook

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

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

D1,2,6 - What home room system

D1,2,7 - Number of school dances

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

D1,2,9 - Procedures for school visitors

D1,2,10 - Principal - Student Council meeting

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

D1,2,12 - Method of locker distribution

D1,2,13 - Student behaviour, problems

D1,2,14 - Activities/Projects of Student Council
1.3 Attendance
D1,3,1 - Should attendance be compulsory for 16+
D1,3,2 - Should attendance be compulsory for 18+
D1,3,3 - Cancellation of classes due to teacher absence
D1,3,4 - Should free time for students be encouraged

1.4 8-9 Transfer
D1,4,1 - Planning 8-9 integration

2. INSTRUCTIONAL PROGRAM
2.1 Curriculum
D2,1,1 - Participation in school athletics, yes or no in what sports?
D2,1,2 - Projects for County done in school shops
D2,1,3 - List on option sheets - what is its format
D2,1,4 - Pupil course requirements
D2,1,5 - What courses to offer, includes study of econ. fees?
D2,1,7 - How many sections per course, includes study of econ. fees?
D2,1,8 - What rooms to each course? (note special requirements)
D2,1,9 - Assign subjects to areas of study
D2,1,10 - How much autonomy to give department heads?
D2,1,11 - How long should periods be?
D2,1,12 - Use bells in schools?
D2,1,13 - Changes in curriculum, modify outlines
D2,1,14 - Should summer school be encouraged?
D2,1,15 - Student assemblies
D2,1,16 - Field trips
D2,1,17 - Approval of courses, get from Ministry
D2,1,18 - Approval of textbooks, get from Ministry

2.2 Budget
D2,2,1 - Budget requirements to be submitted
D2,2,2 - Best ratio of capital to supplies
D2,2,3 - Where should how much computer assistance be purchased?
D2,2,4 - What recommendation to Sen. Admin. for renting/buying capital equipment?
D2,2,5 - Allocation of budget (to departments)
D2,2,6 - How much autonomy do department heads have in spending money?
D2,2,7 - Review of budget spending

2.3 Exams/Promotions
D2,3,1 - Evaluations left to department heads?
D2,3,2 - Should all students write finals, who should write?
D2,3,3 - pass final - gets credit?
D2,3,4 - Have promotion meetings?
D2,3,5 - What promotion policy?
D2,3,6 - Should there be exams?
D2,3,7 - How often should there be exams?
D2,3,8 - Scheduling of exams?

2.4 Non-Regular Events/Library
D2,4,1 - Library open at nights?
D2,4,2 - How much autonomy to librarian?
D2,4,3 - Can time be taken off from class for extra curricular activities?
3. STAFF

3.1 Hire/Terminate/Promote (Regular)
D3,1,1 - Student projections
D3,1,2 - Evaluation of staff
D3,1,3 - How much say should department heads have in teacher selection?
D3,1,4 - How many teachers can be hired given teacher/pupil ratio?
D3,1,5 - What salary to request for principal?
D3,1,6 - Who should be fired?
D3,1,7 - Who should be given a permanent contract?
D3,1,8 - Hiring procedure

3.2 Hire/Terminate/Promote (Non-Professional)
D3,2,1 - Ratio of teachers to paraprofessionals
D3,2,2 - How many secretaries (based on board guidelines)?
D3,2,3 - Salaries of non-professional people

3.3 Professional Development
D3,3,1 - When should inservice training be done?
D3,3,2 - What inservice training should take place?
D3,3,3 - What special staff courses and for whom?
D3,3,4 - How should teachers be developed professionally?
D3,3,5 - When should teachers visit other schools?
3.4 Allocation of Staff

D3,4,1 - Who should build timetables?
D3,4,2 - Class load per teacher
D3,4,3 - Class load for department heads
D3,4,4 - Class load for programme supervisors
D3,4,5 - Class load for Vice- Principals
D3,4,6 - Class load for Chairman
D3,4,7 - Class load for assistant department heads
D3,4,8 - Class load for Principal
D3,4,9 - How much autonomy for Librarian?
D3,4,10 - Duties of paraprofessionals
D3,4,11 - What classes are each V.P. responsible for, re discipline and attendance?
D3,4,12 - Classes for which principal is responsible for discipline/attendance
D3,4,13 - Autonomy of department head re assigning classes to teachers
D3,4,14 - Autonomy of department head in curriculum
D3,4,15 - Autonomy of department head re field trips
D3,4,16 - Authorize who can use P.A.
D3,4,17 - How much authority delegated to head secretary.

3.5 Staff Relations

D3,5,1 - What supervision of teachers policy should be followed?
D3,5,2 - School open 12 months or not?
D3,5,3 - Who should have keys to the school and what areas of the school?
D3,5,4 - When should staff meetings be held on what subjects?

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

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

4. COMMUNITY RELATIONS

4.1 Relations with Parents

D4,1,1 - How many parents nights?

D4,1,2 - Method of reporting to parents

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

4.2 Use of Facilities

D4,2,1 - Use of Facilities

5. PLANT

5.1 Plant

D5,1,1 - Maintenance of facilities

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

D5,1,3 - Fire drills

6. TRANSPORTATION

6.1 Transportation

D6,1,1 - Normal busing procedures

D6,1,2 - Change in procedure due to storms
C. TIMING OF SECONDARY PRINCIPALS' DECISIONS

1. STUDENTS

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3. **STAFF**

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FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume III: Technical Appendices - Central Board Level

Susan Padro

March, 1977

Department of Educational Planning

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

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<td>APPENDIX K</td>
<td>INFORMATION NEEDS FOR DECISIONS - BY BOARD FUNCTIONS</td>
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APPENDIX F

LIST OF BOARD FUNCTIONS
1. **FUNCTION: ORGANIZATIONAL PLANNING**

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

   RESPONSIBILITIES:
   1. Developing a Planning Model for School Board Responsibilities.
   2. Develop a Model of Educational Planning.

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

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

   RESPONSIBILITIES:
   1. Structures and Procedures of the Board.
   2. Structure of the Administration.
   3. Defining the Organization.
   4. Committee Organization.

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

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

   RESPONSIBILITIES:
   1. Interaction among the School Board, the School System and the Community.
   2. Functions of the School Board and the School System.
   4. Evaluation.
4. **FUNCTION: PERSONNEL**

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

**RESPONSIBILITIES:**

2. Recruitment, Selection and Promotion.
5. Evaluating Personnel.

5. **FUNCTION: EXTERNAL RELATIONS**

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

**RESPONSIBILITIES:**

1. To develop a systematic approach to external relations so that the positive influences from both inside and outside the system can be utilized in the development of purposes and objectives of the school programs.
2. To convey decisions of the Board and the staff in an effective manner to concerned groups and organizations in the community.
3. To attempt to obtain positive community support in all areas necessary for a successful school program from such interest groups as: parents, ratepayers, religious organizations, labour groups, Ministry of Education Officials, local municipal officials, universities, teacher organizations, trustee organizations, business and industrial organizations, student organizations.
4. To be aware of the nature of external influences and the mechanisms for controlling them to the benefit of the school programs.
5. To make Board Members, Officials, and all staff aware of their responsibilities in this area.
6. FUNCTION: PLANT PLANNING DEVELOPMENT

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

RESPONSIBILITIES:

1. An ongoing analysis of the projected needs of the educational community for new buildings and facilities.
2. Consideration of community needs and co-operating, where practical, with the community on the inclusion of these needs.
3. Consideration of transportation needs and pupil walking distances.
6. Educational Program Requirements.
8. Site Acquisition.
10. Project Supervision and Control.

7. FUNCTION: PLANT MANAGEMENT

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

RESPONSIBILITIES:

1. Establishment of Objectives and Policies for Plant Management.
2. Custodial Services.

8. FUNCTION: LIAISON

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

RESPONSIBILITIES:

1. Municipalities.
2. Bussing.
3. Interjurisdictional Pupils.
FUNCTION: INSTRUCTIONAL MEDIA DEVELOPMENT

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

RESPONSIBILITIES:

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

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

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

4. Maintain a system of distribution for instructional media.

FUNCTION: ORGANIZATION - SCHOOL LEVEL

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

RESPONSIBILITIES:

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

FUNCTION: SUPERVISION AND EVALUATION

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

RESPONSIBILITIES:

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

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

FUNCTION: EDUCATIONAL PLANNING

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

RESPONSIBILITIES:

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

2. To organize the system so that it will be sufficiently stable to allow for orderly and rational planning and decision making, and sufficiently stable to prevent strong barriers to growth and change.
13. FUNCTION: ACADEMIC BUDGET PROCESS
Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:
1. Compilation of Academic Budget.
2. Control and Monitoring of Academic Budget.

14. FUNCTION: FINANCE
Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:
2. Long-Term Financing and Debt Management.
3. Accounting Systems.
4. Administrative Reporting.
5. Insurance Management.
6. Auditing.
7. Fixed Assets.

15. FUNCTION: TRANSPORTATION MANAGEMENT
Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:
1. Objectives and Standards.
2. Route Planning.
3. Operations.
16. **FUNCTION: DATA PROCESSING**

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

**RESPONSIBILITIES:**

1. To make a continuing analysis of the Board's requirements.
2. Review at regular intervals the existing systems for data processing and recording to determine their current effectiveness in meeting the Board's requirements.
3. Improving Present Data Systems.

17. **FUNCTION: PURCHASING AND STORES**

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

**RESPONSIBILITIES:**

1. Purchasing and Policy Standards.
2. Initiating and Validating Purchase Requisitions.
3. Supplier Selection.
4. Securing Quotations.
5. Issuing Orders.
7. Receiving and Verification for Payment.
8. Stores Control and Administration.
9. Purchasing and Stores Reports.

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

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

**RESPONSIBILITIES:**

1. Obtain Estimates of Revenue.
2. Prepare Tentative Operating Budget for Approval.
3. Review regularly all current or proposed projects on capital budgets.
4. Report at regular intervals revenues and expenses.
APPENDIX G

INDIVIDUAL DECISION FUNCTIONS
<table>
<thead>
<tr>
<th>Number</th>
<th>Decision</th>
<th>Frequency</th>
<th>Time of Year</th>
<th>Board Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>R01</td>
<td>Allocation of Director's time:</td>
<td>Continual</td>
<td>All</td>
<td>(1) Organizational Planning</td>
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<tr>
<td></td>
<td>a) Organization of time to various responsibilities</td>
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<td></td>
<td>- what can be delegated</td>
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<td>- to whom</td>
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<td>b) Priorities on personal time</td>
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<tr>
<td>R02</td>
<td>Interpretation of</td>
<td>continual</td>
<td>All</td>
<td>(2) Organizational-Executive Level</td>
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<tr>
<td></td>
<td>- Board policy</td>
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<td></td>
<td>- needs and wants of personnel; how to handle</td>
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<tr>
<td>R03</td>
<td>Budget preparation</td>
<td>yearly</td>
<td>Oct-Feb</td>
<td>(3) Administrative Relationships</td>
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<tr>
<td></td>
<td>- regular needs</td>
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<td></td>
<td>- special needs and projects</td>
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<td></td>
<td>147  - how much total budget can mill rate stand politically</td>
<td>yearly</td>
<td>Oct</td>
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<td></td>
<td>147  - how much total budget can ceiling stand</td>
<td>yearly</td>
<td>Oct</td>
<td></td>
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<tr>
<td>R04</td>
<td>How should budget be distributed among schools</td>
<td>yearly</td>
<td>Feb</td>
<td>(3) Administrative Relationships</td>
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<tr>
<td>R05</td>
<td>Budget control</td>
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<td></td>
<td>- day school regular</td>
<td>monthly</td>
<td>All</td>
<td>(3) Administrative Relationships</td>
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<tr>
<td></td>
<td>- conferences, courses during year</td>
<td>monthly</td>
<td>All</td>
<td></td>
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<tr>
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<td>- What summer courses for teachers should be subsidized by the Board?</td>
<td>yearly</td>
<td>Nov</td>
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<tr>
<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<td>R06</td>
<td>Teacher salary negotiations</td>
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<td>(4) Personnel</td>
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<td>R07</td>
<td>Striking County pupil/teacher ratio:</td>
<td>yearly</td>
<td>March</td>
<td>(3) Administrative Relation-hips</td>
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<td>- secondary</td>
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<td>- allotting number of teachers to</td>
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<td>i) two secondary schools</td>
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<td>ii) elementary schools</td>
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<tr>
<td>R08</td>
<td>Assessment of Secondary Principals</td>
<td>2</td>
<td>Jan and June</td>
<td>(4) Personnel</td>
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<td>R10</td>
<td>Organizational changes:</td>
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<td>(3) Administrative Relation-hips</td>
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<tr>
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<td>a) Review and changes of job descriptions to accommodate organizational changes</td>
<td>1</td>
<td>Jan</td>
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<td></td>
<td>b) Review of administration organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency</td>
<td>1</td>
<td>Oct-Jan</td>
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<td></td>
<td>c) Review of academic organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency</td>
<td>1</td>
<td>Oct-Jan</td>
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<tr>
<td>R11</td>
<td>Staff morale and welfare problems</td>
<td>Continual</td>
<td>All</td>
<td>(4) Personnel</td>
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<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<td>R13</td>
<td>Justification of spending</td>
<td>Continual</td>
<td>All</td>
<td>(5) External Relations</td>
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<tr>
<td>R14</td>
<td>Leaves of absence</td>
<td>as necessary</td>
<td>All</td>
<td>(4) Personnel</td>
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<td>R15</td>
<td>Board Office accommodation</td>
<td>Once</td>
<td>August</td>
<td>(1) Organizational Planning</td>
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<tr>
<td>R16</td>
<td>Items to be referred to Board's solicitor</td>
<td>as necessary</td>
<td>All</td>
<td>(3) Administrative Relationships</td>
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<tr>
<td>R17</td>
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<td>Monthly</td>
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<td>(3) Administrative Relationships</td>
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<tr>
<td>R19</td>
<td>Deciding whether items should be referred to Board or handled by the Administration</td>
<td>as necessary</td>
<td>All</td>
<td>(3) Administrative Relationships</td>
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<td>R19.1</td>
<td>Agenda items: Board/Executive</td>
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<td>a)</td>
<td>Officials meetings</td>
<td>10</td>
<td>All</td>
<td>(3) Administrative Relationships</td>
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<tr>
<td>b)</td>
<td>Administrative Council</td>
<td>10</td>
<td>All - summer recess</td>
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<td>c)</td>
<td>Executive Committee</td>
<td>10</td>
<td>All</td>
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<td>d)</td>
<td>Board</td>
<td>10</td>
<td>All</td>
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<td>e)</td>
<td>Principals' meetings</td>
<td>10</td>
<td>All - July recess</td>
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<td>f)</td>
<td>Board Committees</td>
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<td>All - July recess</td>
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<td>R20/S10</td>
<td>Assessment of Competency of experienced Teacher Applicants</td>
<td>20</td>
<td>Feb.-May</td>
<td>(10) Organization - School Level</td>
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<tr>
<td>R21/M04</td>
<td>Determination of items for inclusion in monthly financial reports to boards</td>
<td>Monthly</td>
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<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<tr>
<td>M01</td>
<td>Reporting - accommodation, maintenance</td>
<td>Monthly continual</td>
<td>All</td>
<td>(6) Plant Planning and Development</td>
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<tr>
<td>M02</td>
<td>Adult Education:</td>
<td>1</td>
<td>June</td>
<td>(8) Liason</td>
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<td></td>
<td>- selection of principals</td>
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<td>- what guidelines are necessary</td>
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<td>- what fees will be charged (with RB)</td>
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<td>- what lengths of courses</td>
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<td>- what supplies and facilities may be used</td>
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<tr>
<td>M03</td>
<td>Summer School:</td>
<td>1</td>
<td>May</td>
<td>(8) Liason</td>
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<td></td>
<td>a) Should Summer School be</td>
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<td>- operated locally</td>
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<td>- purchased (secondary)</td>
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<td>b) What fees, if any, should be charged (with RB)</td>
<td>1</td>
<td>May</td>
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<td>M04</td>
<td>Determination of recommendations regarding salary proposals for non-teaching staff (caretakers &amp; office personnel)</td>
<td>annual</td>
<td>Oct-Dec</td>
<td>(7) Plant Management</td>
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<tr>
<td>M05</td>
<td>Staff requirements for special projects such as S.O.L.E.</td>
<td>6</td>
<td>May-June</td>
<td>(8) Liason</td>
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<tr>
<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<td>M06/B01</td>
<td>Answers to public regarding requests for changes in operation of the</td>
<td>as necessary</td>
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<td>(15) Transportation Management</td>
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<td>transportation system.</td>
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<td>M07/B03</td>
<td>Determination of recommendations regarding capital construction</td>
<td>annual</td>
<td>September</td>
<td>(6) Plant planning and development</td>
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<td></td>
<td>forecasts.</td>
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<td>M08</td>
<td>Personnel's use of resources:</td>
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<tr>
<td></td>
<td>a) How should a continuing catalogue system for the materials be</td>
<td>1</td>
<td>August</td>
<td>(9) Instructional Media Development</td>
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<td></td>
<td>developed?</td>
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<td>b) How should personnel be</td>
<td>continuing</td>
<td>All</td>
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<td></td>
<td>- advised of available resources</td>
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<td>- encouraged to use resources</td>
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<td>- assisted in use of resources</td>
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<tr>
<td>M09</td>
<td>Problems referred by Plant Supervisor, Special Education and other</td>
<td>as necessary</td>
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<td>(7) Plant Management</td>
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<td>M10/S04</td>
<td>Necessary changes in attendance areas</td>
<td>once per year</td>
<td>March</td>
<td>(11) Supervision and Evaluation</td>
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<td>M11/B05</td>
<td>Determination of information required at various stages regarding</td>
<td>as necessary</td>
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<td>(14) Finance</td>
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<td></td>
<td>applications for building approvals</td>
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<td>M12</td>
<td>Accommodation requirements for schools</td>
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<td>Jan-Feb</td>
<td>(6) Plant planning &amp; Development</td>
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<tr>
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<td>- building proposals</td>
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<tr>
<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<td>S01</td>
<td>Staffing of elementary schools</td>
<td>as necessary</td>
<td>April-Sept.</td>
<td>(10) Organization - School Level</td>
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<tr>
<td>S02</td>
<td>Evaluation of Teachers (Probationary)</td>
<td>as necessary</td>
<td>Sept-June</td>
<td>(11) Supervision and Evaluation</td>
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<td>S03</td>
<td>Evaluation of Principals (Elementary)</td>
<td>Formerly once per year</td>
<td>April</td>
<td>(11) Supervision and Evaluation</td>
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<td>S04</td>
<td>Curriculum Development</td>
<td>once to four times per year</td>
<td>Spring</td>
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<td>S05</td>
<td>Teacher hiring</td>
<td>as necessary</td>
<td>Mainly spring</td>
<td>(10) Organization - School Level</td>
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<td>S06</td>
<td>Promotions of elementary teachers</td>
<td>as necessary</td>
<td>Spring</td>
<td>(11) Supervision and Evaluation</td>
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<tr>
<td>S07</td>
<td>Agenda items - Education Committee</td>
<td>ten times per year</td>
<td>Roth meet Sept.</td>
<td>(11) &quot; &quot; &quot; &quot;</td>
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<td></td>
<td>- Education Council</td>
<td>five times per year</td>
<td>to June monthly</td>
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<td>(sub-committee of education committee)</td>
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<tr>
<td>S09/M10</td>
<td>Necessary changes in attendance areas</td>
<td>once per year</td>
<td>March</td>
<td>(11) Supervision and Evaluation</td>
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<tr>
<td>S09</td>
<td>Resource material utilization/ involvement:</td>
<td></td>
<td>Continuing</td>
<td>(9) Instructional media development</td>
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<tr>
<td></td>
<td>a) What are the best ways of using resource materials by oneself/other teachers/participants?</td>
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<td></td>
<td>b) How can involvement in professional development programs be encouraged?</td>
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<tr>
<td>S10/R20</td>
<td>Competency of experienced teacher applicants following consultation with a superintendent of another board for recommendation</td>
<td>20</td>
<td>Feb-May</td>
<td>(10) Organization - School Level</td>
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<tr>
<td>Number</td>
<td>Decision</td>
<td>Frequency</td>
<td>Time of Year</td>
<td>Board Function</td>
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<td>S11</td>
<td>Planning of Professional Development Programs</td>
<td>2</td>
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<td>(11) Supervision and Evaluation</td>
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<td>S12</td>
<td>Resources for Professional Development Programs</td>
<td>Continuing</td>
<td>All</td>
<td>(11)</td>
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<td>S13</td>
<td>How to keep teachers updated in current trends, concepts and practices (information dissemination on P.D.)</td>
<td>Continuing</td>
<td>All</td>
<td>(11)</td>
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<tr>
<td>S14</td>
<td>Performance Criteria for principals/ Vice-Principals</td>
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<tr>
<td></td>
<td>a) What is the performance criteria for appraising</td>
<td>1</td>
<td>March</td>
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<td></td>
<td>- principals</td>
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<td>- vice-principals</td>
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<td>b) How do each of the above personnel meet the criteria</td>
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<td>S15</td>
<td>Program Modification</td>
<td>Ongoing</td>
<td>May/June</td>
<td>(12) Educational Planning</td>
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<td>S16</td>
<td>Assessment of Academic Program</td>
<td>Ongoing</td>
<td>Dec. (Gr.8)</td>
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<td>Elementary School Budget</td>
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<td>Oct. - Jan.</td>
<td>(13) Academic Budget Process</td>
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<td>S18</td>
<td>Secondary School Budget</td>
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<td>Total Academic Budget</td>
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<td>Jan. (to Board)-Feb. (revised)</td>
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<td>S20/R04</td>
<td>Budget Distribution among Schools</td>
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<td>Number</td>
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<td>Board Function</td>
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<td>B01/M06</td>
<td>Answers to public regarding requests for changes in operation of the transportation system.</td>
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<tr>
<td>B02/R21</td>
<td>Determination of items for inclusion in monthly financial reports to Board.</td>
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<td>B03/M07</td>
<td>Determination of recommendations regarding capital construction forecasts.</td>
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<td>September</td>
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<td>B04</td>
<td>Determination and review of suppliers and specifications for purchase of standard supplies and payments.</td>
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<td>B05/M11</td>
<td>Determination of information required at various stages regarding applications for building approvals.</td>
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<td>Answers to public to requests for information regarding school areas, bus routing, accident insurance claim problems, sale of school building, etc.</td>
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<td>Consideration of cost of operation of schools and resultant decisions concerning what should be done about problem indicated - monthly report inclusion if necessary.</td>
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<td>April-December</td>
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<td>Evaluation of non-teaching employees</td>
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<td>Sept-Dec</td>
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APPENDIX H

AMALGAMATED DECISION FUNCTIONS

PART ONE: DECISIONS BY CLASSIFICATION SCHEME

PART TWO: DECISIONS BY BOARD FUNCTIONS
PART ONE

DECISIONS BY CLASSIFICATION SCHEME
CLASSIFICATION OF CENTRAL OFFICE DECISIONS

A. MAIN CATEGORIES

1. INSTRUCTIONAL PROGRAM
   1.1 Budget
   1.2 Academic Program

2. STAFFING PROGRAM
   2.1 Staff Relations
   2.2 Hiring
   2.3 Professional Development
   2.4 Salary
   2.5 Organization

3. RELATIONS (Board/Community)
   3.1 Board
   3.2 Community

4. TRANSPORTATION
   4.1 Transportation

5. PLANT
   5.1 Problems Arising
   5.2 Accommodation
B. SUB-CATEGORIES

1. INSTRUCTIONAL PROGRAM

1.1 Budget

D1,1,1 - Budget Preparation (R03, S17, S18)

D1,1,2 - Budget Distribution among schools (R04, S19, S20)

D1,1,3 - Budget Control (R05, B07)

D1,1,4 - Determination and review of suppliers and specifications for purchase of standard supplies (B04)

D1,1,5 - Determination of local levies for education (B09)

1.2 Academic Program

D1,2,2 - Curriculum Development (S04)

D1,2,4 - Summer School (M03)

D1,2,5 - Adult Education (M02)

D1,2,6 - Assessment of Academic Program (S16)

D1,2,7 - Program Modification (S15)

2. STAFFING PROGRAM

2.1 Staff Relations

D2,1,2 - Evaluation of non-teaching employees (B08)

D2,1,3 - Evaluation of Teachers (Probationary) (S02)

D2,1,4 - Assessment of Secondary Principals (R08)

D2,1,5 - Evaluation of Elementary Principals (S03, S14)

D2,1,6 - Promotion of Elementary Teachers (S06)

D2,1,7 - Co-ordination and Supervision of Professional Development (S11.4)
D2,1,10 - Leave of Absence (R14)
D2,1,11 - Allocation of Director's Time (R01)

2.2 Hiring
D2,2,1 - Teacher Hiring (S05)
D2,2,2 - Staffing of Special Projects (M05)
D2,2,3 - Staffing of Elementary Schools (S01)
D2,2,4 - Assessment of Competency of Experienced Teacher Applicants (S10/R20)

2.3 Professional Development
D2,3,1 - Objectives for Professional Development Program (S11.2)
D2,3,4 - Planning of Professional Development Program (S11.1)
D2,3,5 - Resources for Professional Development Program (S12)
D2,3,6 - Personnel's Use of Resources (M08)
D2,3,7 - Information Dissemination on Professional Development
  - Distribution of Information on P.D. to Teachers (S13.1)
  - Information Distribution on Innovative Techniques to Teachers (S13.2)
D2,3,9 - Resource Material Utilization/Involvement (S09)
  Encourage Development of Resources (S09)
D2,3,10 - Distribution of Professional Development Overload (S11.5)
D2,3,11 - Encourage Innovation by Teachers (S13.3)
D2,3,12 - Evaluation System for Professional Development Program (S11.3)

2.4 Salary
D2,4,1 - Salary Negotiations, Non-teaching Staff (M04)
D2,4,2 - Teachers Salary Negotiations (R06)
2.5 Organization

D2,5,1 - Organizational Changes (R10)

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

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

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

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

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

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

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

3.2 Community

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

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

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

4. TRANSPORTATION

4.1 Transportation

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

5.1 Problems Arising

D5,1,1 - Problems Referred by Plant Supervisor, Special Education & Other Superintendents (M09)

5.2 Accommodation

D5,2,1 - Recommendation re Capital Construction Forecast (M07,B03)
D5,2,2 - Necessary Changes in Attendance Area (S08, M10)
D5,2,3 - Accommodation Requirements for Schools (Building Proposals) (M12)
D5,2,4 - Board Office Accommodation (R15)
D5,2,5 - Determination of Information Required at Various Stages Regarding Applicants for Building Approvals (B05, M11)
D5,2,6 - Striking County Pupil/Teacher Ratio (R07)
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<td>(1) Organizational Planning</td>
<td>R01 Allocation of Director's Time</td>
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<td>R15 Board Office Accommodation</td>
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<td>(2) Organization - Executive Level</td>
<td>R02 Interpretation of</td>
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<td>R03 Budget Preparation</td>
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<td>R04 How Should Budget be Distributed among Schools</td>
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<td>R07 Striking County Pupil/Teacher Ratio</td>
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<td>R16 Items to be Referred to Board's Solicitor</td>
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<td>R17 Information to Federations, Press and Public</td>
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<td>R18 Deciding Whether Items Should be Referred to Board of Handled by the Administration</td>
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<td>R19 Agenda Items: Board/Executive</td>
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<td>(4) Personnel</td>
<td>R06 Teacher Salary Negotiations</td>
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<td>R08 Assessment of Secondary Principals</td>
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<td>R11 Staff Morale and Welfare Problems</td>
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<td>R14 Leaves of Absence</td>
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<td>(5) External Relations</td>
<td>R13 Justification of Spending</td>
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<td>(6) Plant Planning &amp; Development</td>
<td>M01 Reporting - Accommodation</td>
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<td>M07/B03 Determination of Recommendations re Capital Construction Forecasts</td>
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<td>M12 Accommodation Requirements for Schools - Building Proposals</td>
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<td>(7) Plant Management</td>
<td>M04 Determination of Recommendations Regarding salary Proposals for Non-Teaching Staff (Caretakers &amp; Office Personnel)</td>
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<td>Development of Maintenance Budget</td>
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<td>Monitoring, controlling maintenance budget allocations</td>
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<td>M09 Problems Referred by Plant Supervisor, Special Ed. and other Superintendents</td>
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BOARD FUNCTION

(8) Liaison
M02 Adult Education
M03 Summer School
M05 Staff requirements for Special projects such as S.O.L.E.

(9) Instructional Media & Development
M08 Personnel's Use of Resources
S09 Resource Material Utilization/Involvement

(10) Organization - School Level
R20/S10 Assessment of Competency of Experienced Teacher Applicants
S01 Staffing of Elementary Schools
S05 Teacher Hiring

(11) Supervision and Evaluation
S02 Evaluation of Teachers (Probationary)
S03 Evaluation of Principals (Elementary)
S06 Promotions of Elementary Teachers
S07 Agenda Items - Education Committee
S08/M10 Necessary Changes in Attendance Areas
S11.1- Planninng of Professional Development Programs
S11.5 S12 Resources for Professional Development Programs
S13.1- S13.3 How to Keep Teachers Updated on Current Trends, Concepts and Practices (P.D. Information Dissemination)
S14 Performance Criteria for Principals/Vice-Principals

(12) Educational Planning
S04 Curriculum Development
S15=ITM9 Program Modification
S16 Assessment of Academic Program

(13) Academic Budget Process
S17 Elementary School Budget
S18 Secondary School Budget
S19 Total Academic Budget

(14) Finance
B02/R21 Determination of Items for Inclusion in Monthly Financial Reports to Board
B03/M07 Determination of Recommendations regarding Capital Construction Forecasts
B05/M11 Determination of information required, Building Approvals
B06 Answers to Public in answer to Requests, School Users, Bus Routing
B08 Evaluation of Non-Teaching Employees
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<td>B01/M06 Answers to Public Regarding Requests for Changes in Operation of the Transportation System</td>
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<td>B04 Determination and Review of Suppliers and specifications for Purchase of Standard Supplies and Payments</td>
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<td>B07 Consideration of <strong>Cost</strong> of Operation of Schools and Resultant Decisions Concerning What Should be Done, Monthly Report</td>
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APPENDIX I

TIMING OF DECISIONS FUNCTIONS – BY CLASSIFICATION SCHEME
TIMING OF CENTRAL OFFICE DECISIONS

1. INSTRUCTIONAL PROGRAM

1.1 Budget

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2. STAFFING PROGRAM

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### 2.3 Professional Development

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### 2.5 Organization

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3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

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4. TRANSPORTATION

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5. PLANT

5.1 Problems Arising

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iii) Schools

- Print outs by area-over/un-incl. encumbered funds
- New requisitions - by area
- Note to principal
- Principal's request to overspend
- Admissible expend. E
- ACTIVITY G: Put on "stop payment" & get sup. auth.
- Grant overspend request H
- Authorize & order
- Order of material
- Modify amount
- Fixed amt. authorized
i) Courses, Conferences, Occasional Teach., etc.

ii) Maintenance Items
Teacher Proj

Ceilings

Proposed salary and finance benefit

Finding out costs for alternatives

Total costs, salaries

Estimating money from county

Revenue to be generated from county

Acceptable change

Mill Rate changeable

Better deal possible

Settle
i) Secondary

Dep'n of P/T ratio -- trustees' council

- Find out P/T R by schools
- P/T Ratio across province
- Composition - size of schools
- Propositions of programs

P/T Ratio by school

- Reasons for dev. from Prov. norm
- Special problems of sch. note special courses

Reasons for deviations

- Set new P/T Ratios by school

County P/T R

- Set county P/T Ratio

Get Board approval

- Approved

Extra personnel required

New P/T Ratios by school

ii) Elementary

P/T Ratio across Province

- Itinerant teachers - spec. ed., etc.

Projected enrollment

Size/Types of classes in each sch. next yr.

Determine P/T R for sch. & overall

P/T Ratio for county next year

Get county P/T Ratio approved

P/T Ratio for each sch. next year
System Objectives

Desired Changes in Objectives

System obj. related to school

Obj. of sys. translated to secondary school

Job description of principal

Principal Objectives

Method of Evaluation

Determine method of evaluation

What other boards do

Knowledge from course work, books etc.

Create Evaluation form

Create an anecdotal file & update periodically evalu. form

Evaluation form updated monthly

A final evaluation report

Evaluation form for that year

Anecdotal File

Principal's self-evaluation

Relationship of principal to objective

Obj. of sys. translated to secondary school

Common evaluation report

Method of evaluation
ORGANIZATIONAL CHANGES

Perceived problems

Analyse Structure

Deficiencies in structure

Take appropriate action

Revised Org. Structure
STAFF MORALE AND WELFARE PROBLEMS

Perceptions of others on problems

Perceived Problem

Take appropriate action

Previous Problems—causes & personalities

System-wide

Personal Scale?

Decision

New file on problems, etc.
JUSTIFICATION OF SPENDING

Board authorization--

Look up board authorization

Questions on expenditure

Yes

Questions satisfied

Board member requests report

No board member requests report

Stop

Resolution

Passes

Prepare report, present to approp. cttee

Recommend to board

Recommendations to board

Report on justification
LEAVES OF ABSENCE

Regulations of leaves

Request from teacher

Covered by regulations

Yes

Refer to Admin. Council

No

Admin. Council Recommendation

Refer to Fed. Exec.

Fed. Exec. opinion

Refer to appro. B Com. get opinion

Recommendation to Director

Stop

Yes

Recommend

No

Prepare for B - put on agenda

Report on case

Recommend

No

Evaluation of teacher - P's - super
New staff (seemingly) required

Study to see if new staff required

Staffing report -acc. implic. req. internal required

Check with consultants

Staffing report -external

Send reports to Man.Com. get recommendation

Introduce new methods/more sophisticated machines rec.

Re-examine request and alternatives

Approve

Examine modified goals

System Goals

Re-examine goals in light of restrict. staff

Feasible system goals

Send recommendation to board for decision

Get staff and accommodation

Man. Com. recommendation

Send recommendation to board for decision
Evid. of incident poss. involv. Bd. in litigation

Prepare case history, send to solicitor

Case history (all corres. documents)

Give Advice

Solicitor's advice (in writing)

Examine Advice

Neg. Rec.

Pos. Rec.

Bd. passes/rejects recommendation not to follow advice

Another solicitor gives advice

New advice

Action

Reject

Accept

New Advice

Recommendation to Board

Bd. passes/rejects recommendation to follow ad.

Reject

Accept

Take non-advised action
Problem

Present to interested parties

External information from/other source

Comments of Exec. Com.

Comments of Adm. Council

Policy

Create any new policy

Board recommendations

Take nec. action

Present to Exec. Com.
AGENDA ITEMS: BOARD EXECUTIVE

- Item
  - Admin. Council Recommendation
  - Further Study by Officials
    - Solicitor's Advice
      - Get Solicitor's Advice
      - Report on Item
      - Present to Fed. Exec.
      - Fed. must's recommendations
      - Present to Board Exec.
    - Recommend appropriate action
      - Where to send
        - Take appropriate action
      - Assign to appropriate committee
      - Prepare rec. for board
    - Recommend on item
  - Place on agenda/distribute
    - Prepare report on information item
      - Report on item
      - Present to admin. council
ITEMS FOR MANAGEMENT COMMITTEE

Meeting Arranged

Regular

Initiate Agenda

List of Items

Create Tentative Agenda

Items from Director

Perceived problems in system

Forecast Agenda

Previous agenda items B.F. etc.

Determine non-special items

List of Items

Tentative Agenda

Prepare supporting documents & send out agenda

Get Chairman's Approval

Approved Agenda

Added items and support materials

Prepare any added items

Support material agenda
ASSESSMENT OF COMPETENCY OF EXPERIENCED TEACHER APPLICANTS

Applications

Evaluation of other Bd. by whom criteria used - assessment

Dufferin criteria

Assessment

Assessment of Applicants
What was to be done vs. what actually happened.

Reports on workshops.

Generate reports to teachers.

List of interested people

Those prin. in interested people

Create guidelines for staffing

Guidelines for staffing

Determine a desirable program

Cost by class and program

Interested people for staff

Interests of target population

A desirable program & its staffing

Determine fees and min class size

Final program

Hire staff/create program

Final response to program

Fees, by possible class

Determine any subsidy for fees

Min. class size by possible class size

Fees by possible class tentative

Amount to come off top of budget

Publicize program

Fees, by possible class

Cost by class and program

Min. class size by possible class size

Determine any subsidy for fees

Fees by possible class tentative

Amount to come off top of budget
i) Secondary

- Estimated demand for course
- Prog. fees of selected county
- Estimated transportation costs
- Fee schedule for program
  - Level of subsidy of fees - if any
  - Which county to get service from
  - Prog. fees for candidate counties

- What will demand be - publicize
- Bus Arrangements

- Demand for services
ii) Elementary

Need for program

Determine where & what program will be given

Program & Costs

Estimate of trans. costs

Fees, by offering

Determine Fees

Publicize (students & staff)

Staffing

Interested Teachers

Hire Staff

Staffing required

Demand for program

Bus Arrangements

Bus Arrangements
a) Caretakers

- Provide consultant with caretakers wages info.
- Determine additional info required for negotiations
- Assemble Required Information
- Assist consultant - advise ctee. of Proposed Bd. Recommendations - attend negotiation meeting
- Negotiations Progress Report
- Periodic Reporting to Committee
- Prepare document implementing negotiation decisions - wages - fringe benefit
- Implementation Document
Calculate contract caretaker salary based on agreement with CUPE

Prepare contracts for signatories

Contracts

Contract Signing

Implement terms of contract

New wage schedule → Payroll Dept.
b) Clerical & Secretarial Staff

1. Current C & S Salary Data
2. Review Current C & S Salary Data
3. Recommend Proposed Salaries
4. Advise Mgt. Committee of Proposals
   - No: Mgt. Cttee agreement obtained
   - Yes: Implement Agreement
5. Proposed salary settlement with cost summary
6. Mgt. Cttee, response to proposal
8. Individual notification of revised salary
9. Payroll
10. C & S Salary Schedule
11. C & S Staff
12. Payroll

Wage rates in local offices, ind. pub. ser.
STAFFING OF SPECIAL PROJECTS

1) Purpose of Project
2) Orientation - "people" or "product"
3) Assessment of needs
4) Responsibility determination
5) Appointment of person in charge - if applicable
6) Structure of project
7) Requirements for staffing - job requirements
8) Budgetary Responsibility
9) Responsibility of Budget
10) Hiring
Inquiry

Routine

Yes

Give info & file inquiry

No

File Activity Inquiry

Determine Problem

Obtain nec. information

Board Policy

Info from other sources
- Supt. curr. instruction
- Director
- Plant

Attendance Off. ME-Reg.
off.-specific office

Telephone

How to respond

Letter
DETERMINATION OF RECOMMENDATIONS REGARDING CAPITAL
CONSTRUCTION FORECASTS

1. Previous Forecasts
2. Principal's report to M of E - current enrollment statistics
3. M of E Cap. Requirements Information
4. Board Capital Construction Records
5. Experience from previous forecasts
6. Probable Effect of known Factors, e.g. - new subdiv. - new ind.
7. Assemble Required Information
8. Estimates of Future Enrollment
9. Transform Enrollment Forecasts to Facility Requirements
10. Estimated Future Facility Requirements
11. Board Capital Construction Records
12. Assemble Capital Construction Forecast
13. Determine long-range forecast
14. Forecasted Enrollment from new subdivisions
15. Advice from Superintendents
16. - Facilities Policy
17. - Analysis of factors influencing Fac. req.
18. Communication with M of E Regional Office
19. Communication with M of E Regional Office
20. Capital Construction Forecast
August Catalogue material

Catalogue of material

Update catalogue & inform personnel

P.D. Bulletin - new material available

Updated catalogue

Find new material

New Material

continuous
PROBLEMS REFERRED BY PLANT SUPERVISORS, SPECIAL EDUCATION AND OTHER SUPERINTENDENTS

- Problem explanation
- Determine Problem
- Problem Specification
- Referral or implementation
- Implementation
- Referral
Determination of information required re applications for building approvals

- Determine req. of Prov. Gov't.
- Info. req. of
  - M.E.
  - O.M.B.
  - O.E.C.A.
- Selection of Architect
- Final site, Info., etc.
- Site info. Final bldg. plan
- Architects Selected
- Local site requirements from lawyer
- Direction of Cttee. (Man. or Ad Hoc) re bldg. req.
- Direction re Architect
- Determine debentures needed
- Submit to M.E.
- Submit to C.M.B.
- Plans from Architect
- Debentures needed
- Final plans from architect
- By-law req. from O.E.C.A. for board approval
- Obtain by-law O.E.C.A.
- Develop Contract
- Tenders submitted
- Review of work progress
- Info. re progress to bldg. cttee.
ACCOMMODATION REQUIREMENTS FOR SCHOOLS - BUILDING PROPOSALS

1. Enrol. proj. - 5 yr. - by areas

2. Bldg. plans - OMB
   Expected starting date
   - housing
   - depletion

3. Catholic pop. trend press. to support sep. bd.

4. Live births children 0-5

5. Dropout factor

6. Present Capacity in both sys.

7. Find out building needs

8. Building needs

9. Special Ed. needs - voc. needs, etc.

10. Community use of schools

11. Get board approval

12. Available firms

13. Educational specifications for new building

14. Principal appointed for new school

15. Appoint a princ. if a new school

16. Choose an architect

17. Educational Specifications

18. Create plans

19. Building plans approved

20. Buy Site

21. Build
Determine skills, positions, etc. for implementation

Positions & skills req. for implementation

Determine Deficiencies

Unmet Personnel Needs

Skills, interest, experience required in applicants

Determine cost of adequate staffing

Costs of Staffing

Available Funds

Experience Qualification Responsibility Costs

ITM 14

Return to activity

Enough Funds?

Yes

Advertise Position

No

Go to decision S05
CURRICULUM DEVELOPMENT

1. Assessment of present program needs
2. Review of present curriculum in print
3. New Curriculum Needs
4. M.E. Guidelines
5. Priorities of Needs

Establish curr. needs.

Terms of reference of for committee

Create Committees

Assignment of people to committees

Available Personnel
TEACHER HIRING

1. Staffing Needs
2. Applications Note of skills exp. etc.
3. Positions Advertised

Recommend appointments (by school)

Recommended Appointments

Acceptance

Yes

No
Openings Available

Skills requirements by level

Super. & Prin.
annual report on teachers

Responses to internal advertising

Generate list of internal candidates

Adequate Internal

List of Candidates

Yes

No

Search outside

List of outside candidates

Yes

No

Pare down list

Pare down list the develop recommendation

Recommendations

Board Approval
AGENDA ITEMS FOR EDUCATION COMMITTEE

Agenda
Previous
Years

Analyse
previous
agenda

Topics not
dealt with

Interim
report
given

Completed
topics

Requests for
new topics

Create
tentative
agenda

Tentative
agenda topics
next year

Review by
Admin.
Council

Structure
into mo.
agenda

Structure
of Mo.
agenda
To Workshop Effectiveness of next strategy in getting people to use resources

Goals and needs

Courses Available

Courses which will have funding and eligibility

Who can take what

Time people can take off

Prepare for workshops

Updated materials list

To do Workshop

Who will take part

Personnel record

Which teachers to involve in planning, etc.

Teachers' opinions on workshops, goals, methods

Decision on course work re fundability and eligibility

Tentative demand for courses
PLANNING OF PROFESSIONAL DEVELOPMENT PROGRAMS

Resources - progress to date Admin. Council

Resources - progress to date Fed. Rep.

Resources - progress to date, Dept. heads, Prin. V.P.'s

Summary of resources & progress

Summary of perceived needs

Structure of new program (desirable)

Summary - needs priority

Ques/Dis. - needs, priorities of Prin.

Targets for P.D.


Estimation of time, resources, etc

Residual time - priority - resources available

Create total programme

Total programme - voluntary Below county level
OBJECTIVES FOR PROFESSIONAL DEVELOPMENT PROGRAM

1. Old goals by level and program
2. Generate Goals
3. Goals by level and program
4. Curriculum - new concept etc.
5. Create targets for P.D.
6. Weaknesses, strengths of staff
7. Targets for P.D.
CO-ORDINATION & SUPERVISION OF PROFESSIONAL DEVELOPMENT

1. Generate list of Weaknesses
2. List of problems & weaknesses
3. Set up a Workshop
DISTRIBUTION OF PROFESSIONAL DEVELOPMENT WORKLOAD

- Goals of workshop methods
- Others' suggestions re participants
- Enthusiasm, expertise of participants
- Who involved, time they have available

Decide on duties of personnel

- List of duties of workshop participants
- List of derivative duties for leaders, others
RESOURCES FOR PROFESSIONAL DEVELOPMENT PROGRAMS

Total Program

Personnel Resources Available

Decide on resource utilization

Resources req. from central budget

People Responsible

Desirable resource material

Dig around outside for clues on material

List of worthwhile material

Obtain worthwhile material

Materials

Reports of books, articles, films, tapes etc from conferences

List of courses outside

Working papers at conferences

Materials
DISTRIBUTION OF INFORMATION ON PROFESSIONAL DEVELOPMENT TO TEACHERS

- Strengths, weaknesses of staff
- Present methods
  - P.D. Bulletin
  - Supervision
  - Conference
  - Intervisitation
  - Have them review films, books, etc.

Modify info. delivery system

Modification of info. system

Structure of New program (desirable)
INFORMATION DISTRIBUTION ON INNOVATIVE TECHNIQUES TO TEACHERS

- Who knows what technique
- New Techniques

- Decide who needs what
- Ensure all relevant personnel know new techn.

- Prepare Program
- Program mix desirable

- List of target population

MOR
ENCOURAGE INNOVATION BY TEACHERS

New concepts & techniques

Find applicable new concepts

New concepts & Techniques applicable

Methods for possible encouragement

Set up for innovation

Set up goals, evaluation procedures, etc.
PERFORMANCE CRITERIA FOR PRINCIPALS/VICE-PRINCIPALS

Last year's criteria

Criticisms by Princ. & V.P.s

What should be modified

Criteria to be modified

Set up new standards

New set of criteria

Evaluation Process

Evaluation against criteria

Standards in industry
PROGRAM MODIFICATION

1. Last year's P.D. Program
2. Goals of P.D. Targets of P.D.
3. P.D. Program in other counties
4. Feedback from principals

Changes in curriculum

Develop Modifications

Suggested modifications

Develop new program

Structure of new program (desirable)
ASSESSMENT OF ACADEMIC PROGRAM

1. Standardized tests results by class
   - New vs. old
   - Analysis to develop question
   - Questions on anomalies
   - In-depth analysis
   - Tentative answers to questions
   - Decide on appropriate action
   - Decision on appropriate action
   - Prepare report to board

   - Comparison of performance with previous years
   - Comp. of sys. against norms - each grade level
ACADEMIC BUDGET PROCESS

Budget

Current Program Consideration

Board Objectives

Future Program Consideration

Special needs of students

Special Staff Requirements

Projected Enrollment

Availability of Monies

Review with Principals

Schools

No

Directors Review

Yes

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MONTHLY FINANCIAL REPORTS TO BOARD

- Computer Print-out sheets
- Revenue & Expenditure Items
- Balance Sheet Items

Review Monthly statement with account.

Determine exceptional items on which comment is indicated

Suggestions from Accountant

Compile Report

Monthly Financial Report to Board

Include in Board Agenda

Director Review & Comment

Accountant Review & Comment

Include in Financial Report Board Agenda
DETERMINATION AND REVIEW OF SUPPLIERS AND SPECIFICS FOR PURCHASE OF STANDARD SUPPLIES

1. Last year's quotation request form
2. Review of previous form
3. Advise re quality
   Suggested add/delet of items
4. Prepare new form
5. New quotation request form
6. Fill out form
7. Give quotations
8. Collate school requests
9. Decide on suppliers & order
10. Total Orders
11. Orders Issued
12. Filled out Q.R. forms
13. Quotations
14. Orders Issued
CONSIDERATION OF COST OF OPERATION AND RESULTANT DECISIONS RE REQUIRED ACTION

Print out for each school - by function

Review & Analysis

Prepare Report

Report (suggested action) to Man.Com

Decision

Prepare recommendation for board

Recommendation to Board

Divergencies from budget & causes (exp. items)

Man. Cttee. Decision
EVALUATION OF NON-TEACHING EMPLOYEES

Completed Evaluation Forms

Prepare previous forms

Forms for Sup. plant

Forms for Director's secretary

Evaluate

Completed Evaluations

File evaluations - take needed action
Other boards

ME

Grant Information

Assessment information - prior records

Budget Info. - from Dir. & Man.Com.

Assess Assessment Information

Bring preliminary budget up-to-date

Prepare Preliminary Budget

Prelim. budget estimate of local levy

Prepare final budget

Final Budget

Official Grant Regulations

Final Assessment Info.

Determine Levies

Levies
DETERMINATION OF TRANSPORTATION ARRANGEMENTS WITH BUS OPERATORS

1. Present Schedule
2. Arrangements in other Boards
3. Suggestions of Operators

- Revise present arrangements
- Proposed revision
- Prepare report for Committee
- Presentation to Committee
- Prepare report to board
- Report to Board
DETERMINATION OF METHOD OF BUDGET PRESENTATION

Methods of other boards → Wishes of P's and Trustees → Suggestions to Accountant → Form of presentation - previous years →

Prepare suggestions for Man.Com. →

Difficulties and new suggestions → Make suggestions re improvement to make feasible → Form in other boards → Opinion of Accountant →

Assess feasibility of form → Suggested Form → Determine final presentation method → Form of presentation
ATM 1
ENROLMENT PROJECTIONS (Twice Yearly)

Previous Projections vs. actual (comparison)

Census - age specific

Survey of present population

Formulae re housing vs. population

Present student enrolment

Staging plans by area (Munic. Affairs)

Calculate enrollment projections

Let go and pay fees

5 year proj. 3 year in Oct students by age and area

Expected no. into & out of county

Applications for outside
Projected Enrolments
- total elem.
- total sec.

ME Guess at Grant Structures

Present grant Structure

Board Policy
re payment of fees into & out of county

Calculate revenue projections

5 Yr. Proj. Total Grants
- tuition out + tuition in
MAINTENANCE COST PROJECTIONS

- Standard Costs
- Historical Data on School Maintenance
- Facilities Projection
- Expected Maintenance (Formulae)

Make maintenance cost projections

5 Yr. Proj. Maintenance costs 1 year activity
DEBT CHARGE PROJECTIONS (ANA)

1. Previous Debts
2. Consumables - trend per pupil
3. Estimates Revenue
4. Likely Salaries
5. Other Costs

Make Projections of Debt charges

5 Yr. Proj. debt charges - estimate rev. available
Busing Cost Projections

(Bd. Approval) end Sept./Oct.

Bus Routes

Size of Buses

Costs per Mile

Calculate current year busing costs

Sept.

Total cost by area (Formula)

Make 5-Year Projection of Busing Costs

Oct.

Orangeville
Other

Enrolment Projections by area

Previous Costs, enrolment by area


5-Yr. Proj. - Bus costs
ITM 6
TEACHER PROJECTIONS

Enrolment Projections by area

Bd. Approval Pupil/teacher

Formulae of Special vs. Normal

Individual School Needs

Paraprof./Teacher

Calculate demand for teachers

Special vs. Normal Demand

Courses being taken

Grid

Retirements - planned

Project numbers on current grid

Projection of current grid

Position of newly hired, past - same grid structure is assumed

Projection of future grid structure

Projection of future grid structure
Enrollment projections by area

Present Facilities Inventory

ME Policy on Facilities

Bd. Policy k-8, 9-13 system

School Attendance Boundaries

Make Facilities Projections

Oct.

Extra Facilities Required
AMOUNT AVAILABLE FOR SCHOOLS

Revenue Projections

Main Costs

Debt. Charges (estimate)

Busing costs (est.)

Ceilings

Calculate budget available for schools

95-5 split of amount available for schools

Salaries (est)

Mill Rate Decisions
ITM 10
REVIEW OF PRESENT CURRICULUM IN PRINT

M.E. present
Guidelines

Institution
Objectives

Local Pro-
gram aims
at county
level

Teacher obj.
& validity
in light of
Institution
objective &
county's aims
& Guidelines
from ME

Report on
present
curriculum
Supervision
May

Report of
Review
ITM 11

NEW CURRICULUM NEEDS

Student needs - social, academic physical

Research study which indicates need

What behaviour changes sought

Reasons for rejection

Costs in training personnel & re-organization to accommodate a new program

Report on needed curriculum Supervision

Report on possible new program

Approved Admin. Council

Approved by Board

Yes

Report to curriculum committee
Compare with present program

Present program - flexibility

Changes from old guidelines

Prepare report (for committee) on necessary changes/costs

Changes required and costs
ITM 13

PRIORITY OF NEEDS

Director/Supt. B&F

Total cost of possible curr. modif. and new project

Amount available for curriculum dev't.

Total Cost of other Ed. program

Political considerations:
- parental demands
- student demands
- government demands

Create priorities given constraints

Supervision

Priorities
ITM 14  DETERMINE MONEY AVAILABLE FOR ELEMENTARY SCHOOL STAFFING

Total elementary institution budget → Present Demands → Possible additional funds → Present funds available

Generate possibilities (S.R.)

Possible redistribution of funds → Determine likely available amount (S.R. & Board) → Board Approval

Money Available
(1) Programs

- Generate Program Data
  - S.R. & Principal
  - Innovations
  - Learning outcomes
  - Suitability
  - Student services avail.
  - Outside resources used
  - Results standardized tests
  - Extracurricular available

(2) Teacher Development

- Generate teacher development data
  - S.R. & Principal
  - #Staff in
    a) Professional courses
    b) Academic courses
    c) Workshops
  - #Kind of study groups
  - Prof. jour.
  - Library added to school
  - Staff involvement in county curriculum development

(3) Administration of School

- Generate data on Admin. of school (S.R. & Prin. & other central office staff)
- Accuracy, punctuality of reports
- Within Budget?
- Budget based on school needs
- Plant maintenance accurate, up-to-date records
(4) Influence

Effect on County S.R.-

Involvement in:
- P.D. program
- Curr. dev. program
- Principal association
- Admin. Council

(5) Public Relations

Public Relations S.R.&Princ.

Parent's advisory council
Meeting with the parents
Parent counselling
Civic clubs
Community use of schools
Use of community resources

(6) School Organization

Data generation on school organization S.R. & Princ.

Use of school personnel
Use of space
Governing structure
- Staff involvement in
  - Budgeting
  - Policy
  - Student council
  - Etc.
  - Scheduling

Performance

Performance
APPENDIX K

INFORMATION NEEDS FOR DECISIONS -
BY BOARD FUNCTIONS
(1) ORGANIZATIONAL PLANNING

201 Allocation of Director's Time

Documents

Objective of System
Time management of resources
Time by major area
Time management of personnel
Department of Educational Meeting
Teachers federation
OAEAN and other educational resources
Municipal officials
Prof. Development of opportunities for Director
Priorities for conflicting activities
Personnel by major areas
Previous years time spent
Time required by person

Estimated time for trustees
Estimated time for trustees association
Estimated time for chairman etc.
Estimated time for "in-tray"
Estimated time for board meetings
Estimated time for public
Tentative time schedule
Board Office Accommodation

Documents

New staff (seemingly) required
Staffing report accommodation implication - internal
Staffing report - external
New methods and machines recommended
Feasible system goals
System goals
Management Committee recommendation
(2) ORGANIZATION - EXECUTIVE LEVEL

Analysis

Statement of problem

M.E. regulations

Law

Board policy

Analysis
(3) ADMINISTRATIVE RELATIONSHIPS

R03 Budget Preparation

Documents

Accumulation file on desired budget expense
Basic form from central office
Desired items with priority attached
Principals opinion
Superintendents prior assess. of needs
Estimated amount for main budget
Supervisor of plant - estimate of prices
Budget for main (implied)
Proposed main budget

Consumable/Cap. Alloc.
Principal's consumable and capital allocation requests
Goals of county system progress
Average per pupil allotments across province
P/T ratios by school
Econ. milieu inflation
Per pupil allotments
Needs of spec. ed. music etc.
Total req.
ME grant regulation
Assessment (by area)
Mill rate
Proposed budget
Revised Budget

Grants ME

Necessary Budget changes approved

R04/S20 How Should Budget Be Distributed Among Schools?

Documents

Amount available

Average in Ontario Boards - consumables

Cost of living

Consumables per pupil

Principals' priorities

Library situation re-equalization

Consumable categories by school

Principal's priorities capital allocation

Formulae for capital equipment

Capital allocation budget totals

Priorities for whole system

Principals' opinions

Capital allocation budget

R05 Budget Control

Documents

Requests

Criteria (P.D.) policy on occasional teacher

Authorized expenditure - item area

Desired expenditures

Printouts by area--over/un-incl. encumbered funds
New requisitions - by area
Principal's request to respond
Fixed amount authorized

**R07 Striking County Pupil/Teacher Ratio**

(a) Secondary
Definition of P/T ratio - trustee's council
P/T ratio by school
P/T ratio across province
Composition - size of schools
Special problems of schools - note special courses
Proportions of program
Reason for deviations
New P/T ratio by school
Extra personnel required
County P/T ratio
Approved T/PARA

(b) Elementary
P/T ratio across province
Projected enrollment
Size/Types of classes in each school next year
Itinerant teachers - special education, etc.
P/T ratio for each school next year
P/T ratio for county next year
R10 Organizational Changes

Documents
Organizational structure
Perceived problems
Deficiencies in structure
Revised organizational structure

R16 Items to be Referred to Board Solicitor

Documents
Evidence of incident, possibility of involving board in litigation
Case history (all corresponding documentation)
Solicitor's advice (in writing)
Recommendations to board
New advice of solicitor (in writing)

R18 Deciding Whether Items Should be Referred to Board or Handled by Administration

Documents
Problem
Presentation to Executive Committee
Presentation to Federations
Presentation to Administration Council
External information source/other boards
Comments of Executive committee
Comments of federations
Comments of Administration Council
Committee recommendations
Board recommendations and policy
R19 Agenda Items

Documents

Item

Administration Council recommendation

Solicitor's advice

Report on item

Further study by officials

Recommendation on item

Fed. Executive's recommendations

Recommendation re appropriate action
(4) PERSONNEL

R06 Teacher Salary Negotiations

Documents

Teacher projections
Ceilings
Proposed salary and fringe benefits
Total costs salaries
Revenue to be generated from county

R08 Assessment of Secondary Principals

Documents

Desired changes in objectives—Director and Principal
System objectives
Objectives of System translated to secondary school
Job description of Principal
Relationship of Principal to objectives
what other boards do
Principals objectives
Knowledge from coursework ... etc.
Method of evaluation
The evaluation form for that year
Anecdotal file
Evaluation form updated mo.
Principal's self-evaluation
Relationship of principal to objective
Common evaluation report

Needed revisions of the procedure

System objective/Principal objective

Problem identification

**R11 Staff Morale and Welfare Problems**

Documents

Perceived problem

Perceptions of others on problem

Previous problems raised and personalities

New file on problems, etc.

**R14 Leaves of Absence**

Documents

Request from teacher

Regulations of leaves

Evaluation of teacher-principal's-supervisor's

Report on case

Admin. council recommendation

Fed. Executives opinion

Recommendation to director
(5) EXTERNAL RELATIONS

R13 Justification of Spending

Documents

Question on expenditure

Board authorization--minutes

Report on justification of spending

Recommendations to board
PLANT PLANNING AND DEVELOPMENT

M12 Accommodation Requirements for Schools - Building Proposals

Documents

School population by area
Tentative boundary change
Frequency of prior changes
Space, personnel available in other schools
Effects on other schools
Effects on bus transportation and walking distances
Effect on socio-psych. makeup of children
Criteria - priorities
Tentative changes
Cost estimates
Political implications
Presentation to board - implications, needs, etc.
Decision

MO9 Problems referred by Plant Supervisors, Special Education and Other Superintendents

Documents

Problem explanation
Problem specification
101  Accommodation and Maintenance

Documents

Time schedule for year

What was to be done vs. what accomplished during the month
(succ. vs. fail)

107  Determination of Recommendations Regarding
      Capital Construction Forecasts

Documents

Previous Capital Construction Forecasts

Principals Report to M of E - Current enrollment statistics

Forecasted Enrollment from new subdivisions

M of E Capital Requirements Information

Advice from Superintendents

Facilities policy

Analysis of factors influencing facility requirements

Estimates of future enrollment (from all sources)

Estimated future facility requirements

Board Capital Construction Records

Communications with M of E Regional Office

Experience from previous forecasts

Probable effect of known factors, e.g., new subdivisions, new industries

Capital Construction forecast
(7) PLANT MANAGEMENT

M04 Determination of Recommendations Regarding Salary Proposals for Non-Teaching Staff
   (i) Caretakers
   (ii) Clerical and secretarial staff

Documents

(i) Caretaker wage schedule, benefits
   Comparable schedules in other Boards and industry

(ii) Clerical and secretarial staff salaries
   Teacher settlement
   Caretaker settlement
   Salaries in local offices, public service etc.

M09 Problems Referred by Plant Supervisors, Special Education, and Other Superintendents

Documents

Problem Explanation
MO2  Adult Education

Documents

List of interested people for principal
Interests of target population
Guidelines for staffing
Interested people for staff
Criteria for course offering
Cost by class of program
A desirable program and its staffing
Min. class size by possible class
Fees by possible class (tentative)
Amount to come off top of budget
Fees by possible class
Final response to program
Staffing final program

MO3  Summer School:

Summer School Program (Secondary)

Documents

Program, fees (for candidate counties)
Program, fees (of selected county)
Estimated demand for course
Estimated transportation costs
Fee schedule for program
Demand for services
Bus arrangements

Summer School Program (Elementary)

Documents

Tentative demand for program
Program and costs
Where program will be given
Estimate of transportation costs
Fees-by-offering
Demand for program
Bus arrangements
Interested teachers
Staffing decisions
Staffing requirements

MO5 Staff Requirements for Special Projects
Such as S.O.L.F.

Documents

Purpose of project
Orientation ("people" or "product")
Appointment of person in charge if applicable
Structure of project
Requirement for staffing in job description
Responsibility of budget
INSTRUCTIONAL MEDIA DEVELOPMENT

Personnel's Use of Resources

Documents

Material available (on hand)
Catalogues of material
New material available (on hand)
P.D. bulletin--new material available
Updated catalogue

Resource Material Utilization/Involvement

Documents

Raw material
Annotated material
Effectiveness of next strata in getting people to use resources
Updated materials list
(Teachers) opinions on workshop goals, methods
Which teachers to involve in planning etc.?
Who will take part in workshop?
Courses available
Tentative demand for courses
Time people can take off
Courses which will have payment
Who can take what?
Personnel records (of those involved)
R20* Assessment of Experienced Teacher Applicants

Documents

Evaluations of other board - by whom
- criteria used
- assessment

Applications

Dufferin criteria
Assessment of applicants

S01 Staffing of Elementary Schools

Documents

Administration and service programs, descriptions and plans
Policy on requirements (staffing)
Skills, experience, interests of all people in system
Positions and skills required for implementation
Unmet personal needs
Skills, interest exp., etc. of applicants requirements
Experience and qualifications, and responsibility, costs
Costs of staffing
Money available
Positions to advertise
Applications, their skills, interests, B & P, etc.
Assignment of selected to schools
Teacher Hiring

Documents

Staffing needs (interests, experience, skills required, etc.)

Applications---note of skills, experience, etc.

Recommended appointments

Positions advertised

S10* Competency of Experienced Teacher Applicants

Following consultation with a Superintendent of another board for recommendation

Documents

Evaluations of other board---by whom

- criteria used
- assessment

Applications

Dufferin criteria

Assessment of applicants
(11) **SUPERVISION AND EVALUATION**

**S02 Evaluation of Teachers (Probationary)**

Documents

Principal's evaluation
Principal's recommendation
Superintendent's evaluation
Second Superintendent's evaluation--if S.R. rejects
Recommendation to Director

**S03 Evaluation of Principals (Elementary)**

Documents

Criteria for evaluation
Data by criteria
Evaluation against criteria
Recommended P.D. program
ITM 15

**S06 Promotions of Elementary Teachers**

Documents

Openings available
Skill requirements of levels
Superintendent plus principals annual report on teachers
Responses to internal advertising
List of candidates (internal)
List of outside candidates
Short list of internal candidates

Recommendations

S07 Agenda Items - Education Committee
- Education Council

Documents

Agenda previous years
Topics not dealt with
Interim report given, final still expected
Completed topics
Requests for new topics
Tentative agenda, topics next year
Structure of monthly agenda

S08/M10 Necessary Changes in Attendance Areas

Documents

School pop. by area
Tentative boundary change
Freq. of prior changes
Space, personnel available in other schools
Effects on other schools
Effects on bus transportation and walking distances
Effect on socio-psych. make-up of children
Criteria - priorities
Tentative changes
Cost estimates
Political implications
Presentation to board--implications, needs, etc.
Decision

**S11 Planning of Professional Development Programs**

Documents

Resources--progress to date Administrative Council
Resources--progress to date Fed. Rep.
Resources--progress to date Department Heads, Principals, Vice-Principal's
Summary--resources -- what's been done
Time required for regular duties (super/leader)
Needs and priorities of Principal
Advice of Administrative Council
Summary of needs and priorities
Residual time--priority, resources available
Total program (voluntary below county level)
Needs and priorities (Federal Reps.)
Targets for P.D.
Structure of new program (desirable)

**S12 Resources for Professional Development Programs**

Documents

Total program
Personnel resources available
Resources required from central budget
People responsible
Desirable resource material
Reports of books, articles, films, tapes, etc. from conferences
List of courses outside
Working papers at conferences
List of worthwhile material

S13 How to Keep Teachers Updated in Current Trends, Concepts and Practices

Documents

Present method - P.D. Bulletin
- supervision
- conferences
- intervisitation
- have their review book films etc.

Strengths, weaknesses of staff
Structure of new program
Modification if information dissemination system

S14 Performance Criteria for Principals/Vice-Principals

Documents

Last year's criteria
Criticisms by P's and V.P.'s
Criteria to be modified
Standards in industry
New set of criteria
Evaluations against criteria
(12) EDUCATIONAL PLANNING

S04 Curriculum Development

Documents
Assessment of present program (ITM 9)
New needs (ITM 11)
Priorities of needs (ITM 13)
Review of present curriculum in print (ITM 10)
M.E. guidelines (ITM 12)
Terms of reference for committees
Available personnel
Assignment of people to committees

S16 Assessment of Academic Program

Documents
Standardized test result (by class) - new results and previous years
Questions on anomalies
Answers (tentative) to question
Decision on appropriate action
Comparison of performance with previous years
Comparison of system against norm (by grade level)

S15 Program Modification

Last year's P.D. program
Goals of P.D./targets of P.D.
P.D. program in other counties
Feedback from principals
Changes in curriculum
Suggestions for modifications
13  ACADEMIC BUDGET PROCESS

S17  Elementary School Budget/S18 Secondary School Budget

Documents

Board objectives

Special needs of students

Special staff requirements

Projected enrollment

Availability of monies

S19  Total Academic Budget

Documents

Advertising estimate

Professional development estimates

Cost of resources

Subscription costs - distribution cost, etc.

Estimate of cost for program modification
  - materials
  - new staff
  - retraining staff

Curriculum development

Assessment of Academic program

School Budget - Elementary
  - Secondary

Monies available

Preliminary Academic Budget
**B02*/R21 Determination of Items for Inclusion in Monthly Financial Reports to Board**

Documents

- Computer print-out sheets
- Revenue and expenditure items
- Balance sheet items
- Suggestions from Accountant
- Monthly Financial Report to Board

**B03*/M07 Determination of Recommendations Regarding Capital Construction Forecasts**

Documents

- Previous Capital Construction Forecasts
- Principals Report to M of E - Current enrollment statistics
- Forecasted enrollment from new subdivisions
- M of E Capital Requirements information
- Advice from superintendents
- Facilities policy
- Analysis of factors influencing facility requirements
- Estimates of future enrollment (from all sources)
- Estimated future facility requirements
- Board Capital Construction records
- Communications with M of E Regional Office
- Experience from previous forecasts
- Probable effect of known factors, e.g., new subdivisions, new industries
- Capital Construction forecast
Determination of Information Required at Various Stages Regarding Applications for Building Approvals

Documents

Information required of - M. of E., O.M.B., D.E.C.A.C.

Direction of CMTE. (man. or Admoc.) re building required

Direction re architects

Local site requirement--from lawyer

Site information - final building plan

Debentures needed

Plans from architect

Information to M.E. re a) building proposal
    b) sketch plans
    c) working plans
    d) final approval

Submission to O.M.B.

By-law required from O.E.C.A.C. for building approval

Final plans from architect

Tenders submitted

Information required progress to building committee

Documents

Inquiry

Board policy

Information from other sources - Superintendent of Curriculum instruction
    - director
    - plant
    - M.E. - Pen. Office
    Special Office
    (Pertinent to problem)
P08 Evaluation of Financial Accounting Department Staff

Documents

Previous evaluation forms
Revised forms for Supt. Plant
Revised forms for Director's Secretary
Completed evaluation
Performance Review Document
TRANSPORTATION MANAGEMENT

B01*/M06 Answers to Public Regarding Requests for Changes in Operations of the Transportation System

Documents

Inquiry

Board Policy

Information from sources - sup. curr. instr.
- director
- plant
- M.E. - Regional Office
- Special Office (Perintent to problem)
- levy information
- school bookings

R10 Determination of Transportation Arrangements with Bus Operators - Routing, Loading, Payment

Documents

Present schedule

Arrangements in other boards

Suggestions of operators

Proposed revisions

Presentation to committee

Report to board

M06 Answers to Public Regarding Requests for Changes in Operation of the Transportation System

Documents

Inquiry

Board Policy
Information from other sources
- sup. curr.
- director
- plant
- attn. office M.E. - Rep. Office
  - Special Office
- levy information
- school bookings
(16) DATA PROCESSING
(17) PURCHASING AND STORES

Determination and Review of Suppliers and Specifications for Purchase of Standard Supplies and Payments

Documents

Last year's quotation request form
Advice re qualified suggested addition or deletion of items
New quotation request form
Filled out O.P. form
Total orders
Quotations
Orders issued
BUDGETING AND BUDGETARY CONTROL


Documents

Print out for each school by function
Divergences from budget and causes (expenditure items)
Report (suggested action) to MAN. CMTE.
Report on Man. Cmte. decision
Recommendation to board

309. Determination of Local Levies for Education

Documents

From other boards, ME/Grant information
Budget information from director and MAN. CMTE.
Assessment information prior records by area
Assessment information (from assessment department) present assessment by area
Preliminary budget - estimate of local levy
Official grant regulations
Final assessment information
Final budget
Levies
Budget Compilation

Documents

Methods of other boards

Wishes of Principals and trustees

Suggestions to Accountant

Form of presentation - previous years

Form in other boards

Opinion of Accountant
INFORMATION TRANSFORMATION MODULES

ITEM 1  Enrolment projections (Twice Yearly)

Documents

Previous projections; etc.
Census - area specific
Survey results
Formulae re census
Present student enrollment
Staging plans
Applications from outside
5 year project - 3 years in October; student by age and area
Expected number into and out of county

ITEM 2  Revenue Projections (Twice Yearly)

Documents

Projected enrollment - total elementary - total secondary
Within county or outside county, expected number in and out of county
M.E. guess - grant structures
Present grant structure
Board policy - payment of fees into and out of county
5 year projection - total grants and tuition in - tuition out
Maintenance Cost Projections

Documents
- Historical data on school maintenance
- Standard costs
- Facilities projection
- Expected maintenance formulae
- 5 year projection - maintenance costs - year actual

Debt Charge Pro

Documents
- Previous debts
- Estimate revenue
- Likely salaries
- Other costs
- Consumables - trend per pupil
- 5 year proj. - debt charges - est. rev. available

Bussing Costs Projection

Documents
- Pupil/teacher ratio
- Enrol. proj. by area
- Formula of special vs. normal
- Individual school needs
- Para professional/teacher
- Courses being taken
Special vs. normal demand

Grid

Retirements planned

Position of newly hired, past (same grid. structure is assumed)

Projection of grid structure

**ITEM 7 Facilities Projection**

Documents

Enrol. proj. by area

Board policy K-8, 9-13 system

Present facilities inventory

School attendance boundaries

M.E. policy on facilities

Extra facilities req.

**ITEM 8 Amount Available for Schools (Jan.-Feb.)**

Documents

Revenue projection

Ceilings

Main costs

Salaries (est.)

Mill rate decisions

Debt charges est.

Russian cost est.

95-5 split of amount available for schools
Assessment of Present Practice

Documents

Parents:

1. Social beh.
2. Reports
3. Employability practical skills
4. Teacher's comments
5. Preparation for next acad. level

Principal:

1. Social beh.
2. Academic - standard tests
   - teacher constructed tests
   - report cards
3. Past achievement records
4. Parents comments:
5. Superintendent's comments

Teacher:

1. Social beh.
2. Academic beh.
3. Anecdotal reports of teacher
   - psychologists
4. Comments of principal/superintendents

Informal report on home assessment

Formal report on school assessment

Formal report on classroom assessment

Interests, employability pract. skills, prep. for next level

Report on student assessment

Superintendents' assessment

1. Achievement tests county wide
2. Achievement trends
3. Employability
4. Dropout rates
5. Interschool comparisons
6. Community impressions re-board
7. Social beh. - common level
ITM 10 Review of Present Curriculum in Print

Documents
M.E. present guidelines
Local program aims at county level
Institutional objectives
Teacher obj. and validity in light of inst. obj. and county's aims and guidelines from M.E.
Report of review

ITM 11 New Curriculum Needs

Documents
Student needs - social, academic physical
What behavioural changes sought
Research study which indicates needs
Reasons for rejection or acceptance
Costs in training personnel and reorganizing to accommodate a new program
Report on poss. new program
Report to curriculum committee

ITM 17 M.E. Guidelines

Documents
Compare with present program
Present program flexibility
Changes from old guidelines
Change ren. and costs
ITM 13  Priority of Needs

Documents
Total cost of possible curr. mod. and new program
Total cost of other ed. prog.
Amount available for curr. dev.

Political considerations - parental demands
- student demands
- government demands

Priorities

ITM 14

Documents
Total elementary instit. budget
Possible additional funds

Present demands
Present funds available
Possible redistribution of funds
Board approval
Money available
15. Data by Criteria (Evaluation of Elementary Principals)

**Programs**

**Documents**

- Innovations
- Learning outcomes
- Suitability
- Student services available
- Outside resources used
- Test results
- Extra curricular available

**Performance**

**Teacher Development**

**Documents**

- Number of staff in a) professional courses
  - b) academic courses
  - c) workshops

**Performance**

- Numbers and kind of study groups
- Prof. journal and library added to school
- Staff involvement in county curriculum development

**Administration of School**

**Documents**

- Accuracy and punctuality of reports
- Within budget?
- Budget based on school needs
- Plant maintenance
- Accurate up-to-date records
Influence

\textbf{Documents}

Involvement in (a) Professional Development program
(b) Curriculum Development program
(c) Admin. Council

Public relations

\textbf{Documents}

Parents advisory council
Meeting with the parents
Parents counselling
Civic clubs
Comm. use of schools
Use of community resources

School Organization

\textbf{Documents}

Use of school personnel
Use of space
Governing structure - staff involvement in
(1) budgeting
(2) policy
(3) student council
(4) other

Scheduling