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Interviews with central office superintendents in the academic and business divisions, identification of user needs, and analysis of major management levels provided the data for designing an integrated information system for the Peel Board of Education in Ontario. A synthesis of the data into an overall framework representing the information structure of the Board relates user needs to information and its flow throughout the system. This framework identifies specific information requirements for the system as a whole, as well as key areas of information-utilization and information-generating activities. The study includes extensive technical appendices. (Author/WD)
INFORMATION SYSTEM: ANALYSIS FOR THE
PEEL BOARD OF EDUCATION

Volume I: Description

Susan Padro

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ACKNOWLEDGMENT

The author would like to acknowledge the many participants in the project who contributed to its development and completion. The author is indebted to all the key officials and staff of the central office of the local Board of Education for their excellent cooperation, in spending many hours in intensive interviews describing and analyzing their job functions. Without their generous contribution of time and energy, the outputs of this project would not have been possible. The key members of the project Task Force (Murray, Winter, Glen Whaley and Mr. Costigan) were especially helpful in providing guidance to the project and in contributing their insights and knowledge about the system. As Liaison Officer, Mr. Skinkle proved particularly helpful in coordinating the activities between the local and OISE project staff.

During the course of the project, the OISE membership on the project team varied. Special thanks are extended to two key staff members who made significant contributions to the project, but regrettably left prior to its completion. Ted Vangel, as co-principal investigator and Bryan L. S. V., The OISE Research Officer on the project team, Derry O'Malley, provided substantial inputs in all areas of the study, and especially in the development of the "synthesis" stage of the project. A final word of thanks goes to Mr. Tony Barone, an OISE student who took a special interest
in the project and conducted the analysis for several management
areas of the Peel Board with great success.

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

An information system is defined as a network of communication channels that acquires, processes, stores, retrieves and redistributes data for the individual and collective decision making process. The objective of a management information system is to provide timely, relevant, reliable and valid information upon which to base decisions.

OBJECTIVE AND SCOPE OF THE STUDY

It was the objective of this project to develop a general design for an integrated information system to support the managerial decisions and operational application areas at the central office level of the Peel Board of Education. Although the scope of the system is limited to central board functions, information to and from "external" bodies are dealt with as interfaces with the central board. These include flows of information between:

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

Two foci have been defined for the systems study: the planning function and computer operations. Both these areas have as their...
terms of reference a broad scope which cuts across departmental boundaries and that embraces the entire range of board operations. This made them particularly suitable to aid in the orientation of the system study at the outset of this project. In addition, at the time of study each department, both the above departments were relatively new at the board level, and it was expected that their role in the MIS study would aid in the definition and facilitation of their operations.

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 to 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. The computer is considered one component of the over-all system, in conjunction with other media for storage, processing and retrieval, including the manual component. This ensures that information areas which cannot be efficiently or effectively handled by the computer are not overlooked. 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, a major component was the identification of the "users" of the MIS and determination of their information needs, as related to their management functions.
Operationally, this included: (a) the definition of the major management areas with personnel responsible for them; (b) analysis of the processes in each area; (c) determination of relevant information requirements; (d) identification of source data and timing required to produce the information; and (e) analysis of information flows between the management areas.

Given this analysis, the data base can be designed and maintained in a way as to satisfy user requirements in the most efficient and effective manner, utilizing any combination of media (including 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 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
Figure 1

Management Levels and Information Flow

Director, Trustees, Superintendents

Superintendents & Administrators

Information Requests

Operating Management Information (Control)

Policy Management Information (planning)

Support for Decisions

Special Requests

Demand Reports

Administrative Support & Teacher

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

Scheduled Reports
are geared to the provision 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.

To ensure that the user's perspective was maintained throughout, a Task Force was established as the working unit of the project, consisting of both OISE and PEEL personnel, as follows:

PEEL: Mr. Murray Skinkle - Liaison Officer
       Mr. Tim Costigan
       Mr. Glen Whaley

OISE: Dr. Susan Padro - Principal Investigator
      Mr. Ted Vangel
      Mr. Bryan Elwood

The role of this Task Force was to define the system's objectives, scope and specifications, and to provide guidance and monitoring of the general direction of the project. Responsibilities of the Task Force members were divided such that the Peel Board component provided guidance for the general direction of the project and initiated the contacts with Board personnel while the OISE members provided the technical expertise and the staff for the detailed interviews with Board officials.

The Task Force approach has proved successful in allowing for a close working liaison with Board officials, especially in the

*Some of the personnel listed were not on the project for its entire duration. Dramatic changes occurred in the OISE group, which lost Mr. Vangel and Mr. Elwood in the winter of 1976.
intensive personnel-oriented first stages of the study, as well as providing insights into the operating areas of the Board with their constraints and priorities. This approach has been extremely useful in ensuring the relevance of the project to the needs of the Board and in establishing the confidence and close working relationship with the Board’s personnel essential to the success of the study.

It must be pointed out that the Task Force members, as defined above, were not the only people with major involvement in the project. All the key officials of the Board and many of their top-level staff contributed heavily to the analysis of their specific management areas. This involvement is reflected in the volume of materials presented in the analyses of the major management areas in Volume II of this report. The OISE Task Force component was augmented by Mr. Tony Barone, a student in the department of Educational Planning and Mr. Derry O'Mahony a Research Officer at OISE. Both contributed significantly to the analysis presented in the study.

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 major management areas there is detailed analysis of its components with flowcharts of these activities, and their relationship to other major Board functions.

2. Need analysis for information system design. Information needs of the major management areas are defined in terms of user requirements, reports and data sources.
3. Synthesis of the information structure of the Board. This is presented in terms of an integrated overview of Board functions related to the pattern of information flows, levels of decision-making and clusters of information.

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

A. Initialization

The initialization stage of the project consisted of the determination of the scope and approach of the project, Task Force designation 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. Functions external to it were to be included only in terms of their interface with that office.

At this stage of the project, the specific roles and responsibilities of the Task Force members were defined. The role of the Peel Board members of the Task Force was to provide their insights, understanding and knowledge of the system, to act as a liaison between the study team and Board personnel and to facilitate and actively participate in some of the critical stages of the study, especially those involving initial contacts with key board officials.

The OISE personnel contributed their technical expertise in the analysis and synthesis of the systems study. At the time that the study was initiated, the board had just completed a total change in organizational structure. It was necessary, at this initial stage of the project, for the OISE members of the Task Force to familiarize themselves with this new structure, as well as with the program areas and functions of the board. For this purpose, a general review of the system's operations was carried out.
This consisted of a series of interviews conducted by the OISE project staff with each of the Superintendents at the central office level in both the Academic and Business divisions. Appendix A presents the results of these interviews by Board department. In addition to providing the project team with information about the operations of the Board, these interviews also provided the key officials with the opportunity to acquaint themselves with the nature of the study and the OISE project staff.

B. Analysis: Procedures

In order to fulfill the objectives of the study, it was necessary to determine what information was actually required for activities and operations in the Board's decision-making processes and the channels through which information flowed within the organization. To identify these, user needs were defined in terms of major management areas of the Board office. A detailed analysis of these functions was conducted via a two-stage process: first and second level activity analyses.

Establishment of User Needs:

User needs were defined by the Task Force members in terms of twelve major management areas of the central office of the Board. It was agreed that these areas defined the major activities of the Board, and would form the basis for the Information System design. Table 1 provides a list of these major management areas. It must be noted
### TABLE 1: INFORMATION SYSTEM/PEEL COUNTY SCHOOL BOARD: MAJOR MANAGEMENT AREAS

1. **Budget Process:**
   - 1.1 Preparation
   - 1.2 Control

2. **Accounting Function:**
   - 2.1 Accounts Payable
   - 2.2 Accounts Receivable
   - 2.3 General Accounting
   - 2.4 Payroll

3. **Supply Function:**
   - 3.1 Purchasing
   - 3.2 Stores/Inventory
   - 3.3 Printing Services

4. **Accommodation Supply:**
   - 4.1 Capital Projects
   - 4.2 Facilities Inventory

5. **Plant Operations & Maintenance:**
   - 5.1 Operations
   - 5.2 Maintenance

6. **Transportation:**

7. **Personnel Administration:**
   - 7.1 Salary Administration
     - Job Evaluation/Description
     - Payroll
     - Benefits
   - 7.2 Personnel Allocation

8. **Staff Development & Relations:**
   - 8.1 Development
   - 8.2 Relations
   - 8.3 Evaluation
     - Academic
     - Non-academic

9. **School Curriculum (Program):**
   - 9.1 Development & Evaluation
   - 9.2 Operations

10. **Special Student Services:**
    - 10.1 Special Education
    - 10.2 Attendance
    - 10.3 Psychological Services

11. **Continuing Education:**

12. **External Relations:**
    - 12.1 Ministry Reports:
      - June Board Report
      - Financial Report
    - 12.2 September School Report
that these areas do not necessarily reflect departmental units within the system, but rather define management functions, many of which may cut across budgetary boundaries.

This was considered the most useful approach for the information system analysis, since it would prove to be more flexible in the face of organizational changes as a consistent set of functions which would have to be carried out regardless of where they were actually "housed". From the point of view of the information system, it is these functional areas which have greatest impact on the information structure of the system.

Analysis of the Major Management Areas: First Level

The first level of analysis of the major management areas was designed to provide an overall understanding of the operations of each management area. This analysis included a breakdown of each area into its main component parts, with associated inputs, outputs and key personnel identified.

Many of the initial interviews to collect the data required at this stage were conducted by the Peel members of the Task Force, using a standardized data sheet. This approach was successful in introducing key board officials to the details of the study, and in gaining their commitment to it. Due to the time constraints of overburdened key Board officials, OISE staff conducted a series of concentrated follow-up interviews to complete this stage of the
study. The preliminary outcomes of these interviews for each major management area were then validated by the officials involved. These activity analysis sheets were then used to develop flowcharts of the main processes in each major management area. These too were validated and updated by the relevant staff members. The finalized activity analysis documents are presented in Appendix B, and the flowcharts in Appendix C.

Analysis of Major Management Areas: Second Level

This level of analysis followed the first level interviews, providing a detailed description of each component of the major management areas. This included specific sequences of activities, timing, personnel, information requirements and associated data sources. These intensive interviews were rather technical in nature, and thus were conducted primarily by the OISE staff with assistance from the Peel Board members of the Task Force where necessary.

Flowcharts of these detailed processes were prepared from the interview data sheets and from follow-up discussions for clarification of the flows, where necessary. In some cases, flowcharts were prepared directly at the interviews, omitting the intermediate stage of completion of the detailed activity description forms. Both the detailed activity analysis documents and flowcharts were validated by the personnel responsible for the respective areas. Appendix B presents all the activity analysis documents—both for the first and second level analyses. Appendix C provides the flowcharts relating to the total set of activities as defined in the activity analysis documents.
C. Analysis: Outputs

To illustrate the type of outputs produced by the first and second level analyses, this section will present the major management area of the "Budget Process" as an example. This area is divided into two components: preparation and control. The "Budget Preparation" area is used in this example. For the first level analysis, the Superintendent of Administrative Services was interviewed and, as a result, the overview form presented in Table 2 was completed. This lists the major set of steps involved in the budget preparation process, along with the main inputs, outputs and participants. Using this document as a basis, a flowchart of the overall process was drawn, as illustrated in Figure 2. This flowchart illustrates in further detail the general flows of documents and information in the steps of budget preparation.

The second level analysis consisted of detailed analyses of each step in the process, as outlined in the first level analysis. To illustrate this, step 2 in the overview document (Table 2) has been selected: "Prepare school requests". Table 3 presents the breakdown of the activities involved in the preparation of school budgetary requests from the Field Office. Ten steps are listed in the process, along with their inputs and outputs. Input is defined as the information necessary to carry out the step. The source of the input information is noted on the document. On the output side, not only information, but actions or consequences of the step are itemized, along with their timing. The personnel with major responsibility for each step in
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
</table>
| 1       | Prepare budget guidelines | 1. Budget format  
2. Expenditures - current year to-date  
-instructions  
-expenditure summary (current year) | Supt. of Finance |
| 2       | Prepare school requests | 1. Cap-current requests  
2. Special requests  
3. Mtce. requests | 1. School requests | School staff |
| 3(a)    | Prepare Area Requests, priority rank | 1. School requests  
2. "Overheads"  
3. Budget Guidelines  
4. Consultation - Finance | 1. Area requests  
2. Requests to Departments | Superintendents - Families |
| 3(b)    | Prepare Department requests, priority rank | 1. Program requests - Dept.  
2. Program requests - areas  
3. "Overheads"  
4. Budget Guidelines  
5. Consultation - Finance | 1. Department requests (Forms BD-1, 1(a), 2(a)) | Department Heads |
| 4       | Prepare Superintendency Requests, priority rank | 1. Area requests  
2. Department requests  
3. "Overheads"  
4. Budget Guidelines  
5. Consultation - Finance | 1. Superintendent requests (Form BD-2) | Superintendents |
| 5       | Total Budget Compilation | 1. Superintendent Requests  
2. Dept. and Area Requests | 1. Budget Request | Superintendent of Finance |
| 6       | Budget Review - Internal (adjust, revise) | 1. Budget Request  
2. Consultation - Supts., Dept. Heads  
3. Revenue Estimates  
| 7       | Budget Review - F & B Comm. (Adjust, revise) | 1. Revised Budget Request  
2. Revenue Estimates  
3. Ceiling Calculations  
4. Consultation - Supts. | 1. Final Budget Request | F & B Committee |
| 8       | Get Approval | 1. Final Budget Request | 1. Approval Budget | Board |
FIGURE 2
1.1 (cont’d)
the process are also listed on this document. Figure 3 presents a flowchart based on this detailed activity analysis. Again, the flowchart allows for easier understanding of the flows of information with respect to the activities in the process.

It is not expected that all these documents and flowcharts would be of equal use to all Board officials. Those who head departments or have primary responsibility for an entire major management area would be most interested in the overview of their sphere of operations, and would study the detailed analyses only as required. Similarly, those who are responsible for a specific component of a major management area would receive greatest use from the detailed analysis of that component, with the overview analysis aiding in the understanding of how that component links to the others in that area.

The overview and detailed activity analysis documents have been compiled by major management area in Appendix B, while all the flowcharts (general and detailed) are presented in Appendix C. The rationale for separating the documents from the flowcharts is that one would expect these to be utilized by different groups of people. The activity analysis documents are easily readable and can be understood equally by technical and non-technical personnel. The flowcharts on the other hand, would probably be most useful as inputs to technical staff in the computer operations area.
### TABLE 3

**AREA:** 1.1.2.1  **BUDGET PREPARATION**  
**COMPONENT:** SCHOOL REQUESTS FROM FIELD OFFICE

**OBJECTIVES:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Prepare description of Budget Categories and Instructions</td>
</tr>
<tr>
<td>(a)</td>
<td>Set upper limit on cap. current and replacements</td>
</tr>
<tr>
<td>2</td>
<td>Cap. Current &amp; Replacement and Supplemental Budget prepared by schools</td>
</tr>
<tr>
<td>3</td>
<td>Meeting of Field Supt. with Principals for clarification, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DESCRIPTION</strong></td>
<td><strong>SOURCE</strong></td>
</tr>
<tr>
<td>Previous Budget Documents</td>
<td></td>
</tr>
<tr>
<td>Board per pupil and allocation policy</td>
<td>Planning</td>
</tr>
<tr>
<td>Enrollments (current Conditions &amp; Needs of Individ. Schools</td>
<td>Schools</td>
</tr>
<tr>
<td>Description Document</td>
<td></td>
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<tr>
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</tr>
</tbody>
</table>
**TABLE 3**

**AREA:** 1.1.2.1  **BUDGET PREPARATION** (Cont'd) **COMPONENT:** SCHOOL REQUESTS FROM FIELD OFFICE

**OBJECTIVES:** 1.  
2.  
3.

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS / LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Requests from school generated at any time and reviewed by Supt. or designate (Admin. Assist.) (upto 50%)</td>
<td>Request from school Upper limits Educational relevance to program</td>
<td>Requisition</td>
<td>A.N.A.</td>
<td>School and Field Office</td>
</tr>
<tr>
<td>4(a)</td>
<td>Non-allocable requests--to Construction Dept.</td>
<td>&quot;&quot; + Rationale for need</td>
<td>Request for Estimate to Construction Department</td>
<td>4 Mons. lead-time</td>
<td></td>
</tr>
<tr>
<td>4(b)</td>
<td>Major Requests to Supt. of Plant</td>
<td>+ Rationale for need</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Requests over 50% and Supplemental held until Budget Approval</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Consider Requests over 50% of Budget--Approved Subject to Board Approval</td>
<td>Budget Approval by Board</td>
<td>Requisitions out automatically</td>
<td>A.N.A.</td>
<td>Following Budget Approval by Board (Spring)</td>
</tr>
<tr>
<td>6(a)</td>
<td>Consider Supplemental Requests</td>
<td>Budget Approval by Board Budget Balance (incomitted)</td>
<td>Requisitions for Approval items</td>
<td>Following Budget Approval by Board (Fall)</td>
<td></td>
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</table>
1.1.2.1 BUDGET PREPARATION: School Requests From Field Office

Conditions at individual schools—needs

Prepare description of budget categories: includes upper limit for cap. current and replacements, to which schools should adhere

Board approved per pupil allowance (polic

Schools prepare Cap. Current and replacement budget within guidelines and supplemental items—in priority order and major requests (over $300)

Determine % of Cap. Current (a) allocable (e.g. Instr.) (b) non-allocable (Bldg.)

Principals Meeting to discuss descriptions and procedures and clarify

Requests submitted to Area Supt.

Requests reviewed

Requests Cap. Current Replacement
FIGURE 3
1.1.2.1 (cont’d)

Superintendent

Request for estimate

YES — Non-allocable

Request legitimate?

NO

Send back for revisions

Revised requests

YES

Request up to 50% of total — forward to Budget Control and Purchasing

Budget Finalisation

Budget approval

Requests over 50% of budget held by Field Office

Final approvals on requisitions

Purchase requisition

Construction dept.

Consider Supplemental Budget requests

Approve Supplementals up to budget allowance

Supplemental

Estimate of project

4 mths.

Field Supt. approval

To Construction dept. for tendering and job completion

Supt. of plant approval and set priorities

Plant dept. budget (regional)

Planning and Building Committee

Stop
D. Synthesis: Information Structure

The completion of the activity analyses provided a detailed systems study of the organization in terms of major management areas. The next step was to synthesize the disaggregated data into an overall framework representing the information structure of the Board. This consisted of the development of the flowchart presented in Figure 4. Here, information sources and destinations, external to the management process are distributed around the circumference of a circle, and are arranged according to the following scheme (reading clockwise around the circle from centre left).

(a) Agencies generating Demand for school board services and resources, i.e., the clients of the board.
- The local community, Adult, special and regular students.

(b) Agencies generating the Supply of services and resources to meet the needs of school board clients.
These are - the Provincial program and financial resource agencies;
- the board teaching and support staff;
- the suppliers of goods and services from outside the school system.

The three levels of decision-making are represented by the three main concentric circles in the diagram: the outer circle represents operations and operational control, the middle one management (tactical) control and the central core houses activities concerned with strategic planning. At the centre of system is the area of "Board
Direction & Approval. The main components of the major management areas have been placed on the diagram (in bubbles) at decision levels most representative of their major functions, with some overlapping two areas as necessary. Thus, the management areas which can be classified under the "planning" level of decisions include budget preparation, accommodation supply, school curriculum (planning and evaluation), a portion of contract negotiations and of special student services. At the "management control" level are management areas such as general accounting (capital), budget control, personnel allocation, timetabbling and grade reporting, transportation and so on. It is clear that most of the management areas fall within the category of "operations and operational control". These include most of the accounting functions, external relations, staff development functions, some areas of special student services, some activities in transportation, plant operations and maintenance, supplies and so on. The arrows indicate flows of information between the management areas themselves and also between the management areas and the main information clusters within the board. These latter are indicated in the diagram by rectangles. Flows of information are also noted between the board office and agencies external to it, both within the jurisdiction of the Board (e.g., area offices, schools, teachers) and those external to it (e.g., other Boards, Ministry of Education, etc.).

The synthesis provides the general design of the Board's information structure. It relates user needs to information and its flows throughout the system. It is from this frame of reference that specific information requirements can be defined for the system as a whole.
Table 4 summarizes the relationship between the management areas and clusters of information as defined on Figure 4, in terms of the principal sources of information used by each area. Locations in the table marked with an asterisk denote a potentially useful information source not currently used by the management area indicated. Table 4 provides, along with the synthesized flowchart, the basis for the specific design of data files for the information system.
<table>
<thead>
<tr>
<th>Management Areas</th>
<th>Personnel</th>
<th>Admin.</th>
<th>Staff Placement</th>
<th>Staff Development &amp; Evaluation</th>
<th>Accounting Files</th>
<th>(b) Payroll</th>
<th>Purchasing Files</th>
<th>Plant &amp; Facilities</th>
<th>Transportation Data</th>
<th>Registration Data</th>
<th>Special Files</th>
<th>Decentralized Files</th>
<th>Capital Outlay</th>
<th>Current Program Evaluation</th>
<th>Budget, Timetables, Schedules, Departmental/Official Reports</th>
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<tr>
<td>1.0 BUDGET PROCESS:</td>
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<td>1.1 Preparation</td>
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<td>1.2 Control</td>
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<td>2.0 ACCOUNTING FUNCTIONS:</td>
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<td>2.1 Accounts Payable</td>
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RESULTS OF THE STUDY

The study reported in this document provides a comprehensive analysis of the major activities of the Peel Board's central office operations and the types, levels and flows of information related to these operations. Not only are the major management areas analyzed independently, but the relationship between these is synthesized to form an overall integration of Board activities and information. This provides a structure which would not be obvious in the analysis of specific management areas or departments alone. In so doing, it identifies key areas of information-utilization activities and information-generating activities (i.e., sources and sinks of information) which provides the basis for specific information system design.

RECOMMENDATIONS FOR USES OF RESULTS

The results of this study can be used in a variety of ways. The set of activity analyses represented by the documents in Appendix B can be particularly useful to superintendents and their staffs whose main responsibilities lie in specific major management areas. These can be used as a documentation of the general and detailed functions in those areas, and of their relationship to other areas. Where necessary, they can provide useful information for designing new procedures within management areas. It is recommended that the documents be updated as changes in organization
and functions occur within these management areas, so that they will continue to provide a detailed, up-to-date analysis of Board operations and information requirements.

The flowcharts in Appendix C can serve a similar function with respect to providing information about operations within activity areas. However, these have the additional advantage of representing flows of information within and between these areas in a manner which is impossible in the analysis documents. Although these can be used in conjunction with the documents by all interested staff, it is expected that the technical computer operations staff will be most interested in these outputs. To the systems analyst, these, along with the overall systems information provided in the flowchart in figure 4, and in Table 4 will provide the structure basis to:

1. Identify areas where computerized procedures could be designed to facilitate activities of the Board.
2. Determine information gaps and inadequacies.
3. Identify areas of information overload and redundancy.
4. Streamline overall information flows.
5. Design specific, integrated report generating procedures with the associated data base to meet the timing requirements of decisions or activities.
6. Design specific data files within the information categories defined in this document.

To the Planning Department, the outcomes of the study provide a unique overview of the range of Board operations. Since the
planning function relates to activities which cut across departmental lines, the perspective provided as a result of this study can be useful in identification of areas where the Planning Department can provide inputs for procedural designs, or which can provide useful information for planning purposes.
INFORMATION SYSTEM: ANALYSIS FOR THE
PEEL BOARD OF EDUCATION

Volume II: Technical Appendices

Susan Padro

March 1977
This volume presents the detailed, technical results of the information analysis at the Peel Board of Education as described in Volume I. A description of the contents of each appendix follows.

Appendix A

This appendix provides a preliminary overview of the departmental operations of the Peel Board. It is based on a series of interviews conducted at the outset of the study to provide the study team with a general understanding of the Board's functions.

Appendix B

This appendix contains the set of documents which provide the analysis of the major management areas. For each area, there is (a) an overview document, which lists the main activities or components in the area along with related inputs, outputs and participants, and (b) a set of detailed procedure analysis documents, which further break down each of the activities listed in the overview document. The detailed procedure analysis includes the steps in the process, associated input information and its source and resultant outputs and their timing. Participants and/or location are also presented for each step.

It must be noted that in some cases, a detailed procedure analysis document was not prepared for each component listed in the overview document. This may be due to the following reasons:
1. The overview document is sufficiently detailed, so that a detailed document for certain steps would be redundant.

2. Detailed flowcharts were prepared directly at the interviews, omitting the intermediate step of completion of the analysis document.

Appendix C

This appendix contains the flowcharts which relate to the analysis of the major management areas. For each area, an overview flowchart and detailed flowcharts are included, corresponding to the areas covered in the analysis documents. For some areas, however, flowcharts have not been prepared: these consist of areas which cannot be broken down into a series of steps which represent "flows" but suffice to have a listing of inputs and outputs for discrete components. In such cases, the analysis documents provide all the necessary information required for the analysis.
APPENDIX A

PRELIMINARY OVERVIEW OF DEPARTMENTAL OPERATIONS
LEVEL 1 MEETING: SCHOOL PROGRAM DEPARTMENT

(1) OVERVIEW

Superintendent of School Program: W. Douglas McVie

(a) Major Areas of Responsibility:

1. Curriculum development
2. Professional development
3. Education program research

(b) General

1. Doug McVie is a permanent member of the Curriculum Development Council.
2. Role still in a state of flux as a result of recent organizational changes.
3. Process for program change.
(2) MAJOR FUNCTIONS WITHIN EACH AREA

1. - Curriculum Development (Doug McVie)

1.1 - Interpretation of Ministry curriculum guidelines for schools' use.

1.2 - Monitoring school programs:
   - cataloguing secondary courses/programs and elementary program descriptions.
   - approving all new courses/programs (esp. 'experimental' programs) prior to Board and Ministry submission.
   - evaluating new courses/programs.

1.3 - Provision of guidelines for school program development:
   - minimum course content
   - program rationalization
   - program objectives

1.4 - Curriculum resource development:
   - non-certified 'teacher' resources for special programs
   - media/learning resources: guidelines for acquisition.

2. - Professional development (Charlie Brown)

2.1 - Teacher in-service program development:
   - perceive and anticipate teachers need in the field
   - disseminate, interpret Board and Ministry guideline releases.
   - leadership training
   - communication skills

2.2 - Liaison with teacher training institutions.

2.3 - Teacher courses and conventions: Catalogue and disseminate to schools lists of relevant courses and conventions.

3. - Education program research. (Judy Spigel)
3.1 - Monitoring of Questionnaire Type Studies:

- general concern in the areas of curriculum, school program, etc.
- Ministry-initiated studies cover students, teachers, parents.
- Internally initiated studies would look into areas such as:
  - sex, drugs, alcohol
  - open area
  - French

3.2 - Testing of Core Curriculum

- administration of standardized tests across the system
- data bank of test results has been generated but there is some difficulty to retrieve centrally (IBM).

4. - Priorities

4.1 - Aid to teachers where none has been available before — i.e. professional development probably most important as a result of curriculum changes.

- Inservice for all teachers in a given area — i.e. universability of coverage in a specific area.

4.2 - Evaluation of outputs of schools, e.g. what is the impact of the schools on the youth.

4.3 - French immersion program
LEVEL 1 MEETING: PLANNING DEPARTMENT

March 5, 1974

(1) OVERVIEW

Superintendent of Schools (Planning and Development): Bill Lambie

(a) Major Areas of Responsibility

1 - Enrollment Projections
2 - Budget Reporting
3 - Contingency Planning
4 - Information
5 - Development of Realistic Time-Schedules and Time-Management Practices

(b) General

1 - The Objective of the Planning Department is to:
   - develop planning information, and
   - assist in developing good criterion-referenced, consensus decision processes

2 - Role of Planning Department
   - The Planning Department currently is considered to be a short term function to:
     - analyze needs and design
     - act as a service and control function
     - serve as a training function
     - concentrate in the areas of facilities, contingency, evaluation and setting of objectives
     - the planning role will later be filtered down to other departments where it will be part of the on-going operations.
(2) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Enrollment Projections

- the development of expertise in enrollment projections is viewed as functional to the planning process - (refer to Bill Lambie's paper on Objectives of the Planning Dept., April 1, 1974)

- good enrollment projections allow for more accurate analysis for almost the whole spectrum of problem-areas in the system, e.g. - capital construction allocations
  - boundary changes
  - site location
  - facilities planning
  - transportation
  - budgeting, etc.

- requires organization and good communications with the other groups in the system

2 - Budget Reporting

- current involvement in the design and implementation of a new Budget reporting system

- Bill Lambie (Planning) is responsible for the design of the new system and Bill Keith (Finance) will take over the control aspects when developed

- objective of the system is the development of revenue/resource needs and information regarding costs of projects or studies.

3 - Contingency Planning

- anticipate and develop effective strategies for coping with specific contingencies that may arise

- part of the approach is to develop information for different simulations.
4 - Information

- the development of an accurate, responsive information system
  for the Board, the public, and the staff
- organized, relevant, timely and meaningful information would be
  most useful in areas such as transportation/bussing, accommodation
  planning, enrollment projecting, program planning, personnel,
  building, etc.

5 - Development of Realistic Time-Schedules and Time-Management

Practices

- especially in terms of major programme and administrative planning
  e.g., review process for Building Specifications
    - Resource allocation system - management/program/services
      - accountability of objectives of superintendent level

(3) PERSONNEL

- organizational structure and staff to be obtained at later meeting

(4) PRIORITIES

- Budget Reporting System
- Enrollment Projections and the methodology and organization
  associated with the role of enrollment projections for planning.
LEVEL 1 MEETING: BUILDING AND PROPERTIES

Superintendent of Plant: (Derek Wilkinson)

(1) OVERVIEW

Major Areas of Responsibility

1 - Design and Construction
2 - Maintenance
3 - Caretaking
4 - Cap from Current Projects

(11) MAJOR FUNCTIONS WITHIN EACH AREA

(a) 1 - Design and Construction

   Supervisor of Design and Construction: (Harley Phillips)
   - has 1 assistant and 2 technical assistants
   - his job is to convert educational briefs to reality
   - must get Ministry and O.M.B. approvals
   - recommends architect to Superintendent of Plant for Board approval
   - tenders contract
   - site supervision of construction
   - recommends approval of progress payments

1.1 - Site Selection (D. Wilkinson, J. Greenlaus, H. Phillips)
   - planning dept. chooses locations and is concerned with obtaining approval of need from the Ministry
   - buildings and property people rule on the suitability of the location
   - currently the County owns ninety sites
1.2 Plans/Specification (new Construction)

- planning; developer dedicates site
- eventually give site approval prior to dedication
- site evaluation (See 1.1)
- sketch plans based on planning dept. specifications and traditionally developed architectural standards/construction with area superintendents and principals.
- final plans and approval

2. Maintenance and Operations (Jim Ellison)

- 5 area supervisors of maintenance and operation – correspond to each area office, (i.e., family of schools)
- each area supervisor has a crew of 3 men; they tend towards general handyman rather than specialists
- there is a regular maintenance routine and in between minor repairs are handled as they occur
- there are two assistant supervisors – Stuart Lee and Peter Boesener. Mr. Boesener handles the current capital budget responsibilities. Mr. Lee is in charge of the central maintenance staff.

3. Caretaking

- large amount of caretaking done by contract and, part-time cleaners
- permanent staff small compared to other boards

(b) Breakdown on Activities by Budget

1 - current: repairs

2 - Capital/current: alterations, programmed upgrading of facilities, i.e. fire standards, lighting levels, etc.

3 - capital: new construction
(111) PERSONNEL

(a) Organization chart pending

(b) Responsibilities: Defined in Section (11)

(IV) PRIORITIES

1 - all three major areas of responsibilities have approximately the same priority except that there is a tendency to emphasize Design Construction

2 - all current projects and needs

3 - data bank project
LEVEL I MEETING: PERSONNEL DEPARTMENT

(1) OVERVIEW

Department Head: R. Steadman

(a) Major Areas of Responsibility

1. Recruitment, Transfers & Separations (Non-teaching staff)
2. Teacher Recruitment
3. Salary Administration
4. Employee Benefits & Safety
5. Performance Appraisal, Promotion, Organization (in cooperation with line management)
6. Negotiations (Resource department for Board)
7. Collective Agreements
8. Training & Development
9. Communications & Counselling
10. Personnel Records

(b) General

1. The inter-relationship between the major areas of responsibility are apparent since they are functions normally associated with personnel departments.
2. Mr. Steadman is directly responsible to the Superintendent of Business Affairs but also functionally reports to the Superintendent of Academic Affairs.
MAJOR FUNCTIONS WITHIN EACH AREA

1 - Recruitment, Transfers & Separations of Non-Teaching Staff

1.1 - Recruitment: (Mrs. Chapman/Mrs. Ward)

- office and secretarial staff - (Mrs. Chapman)
- supervisory and administrative staff
  )
- custodial and maintenance staff
  ) (Mrs. Ward)
- lay help (A.V. technicians)

1.2 - Transfers:

- arrange suitable transfers
- CUPE involved
- all processing done by the personnel dept

1.3 - Separations:

- process termination and inform payroll
- conduct exit interviews for staff who leave voluntarily

2 - Teacher Recruitment (S. Pawloski /S. Colbert/Pat Morgan)

2.1 - Recruitment:

- request from principal for new person; (need for new teachers
  established by Mr. Dobson)
- Advertisement placed in newspapers
- all applications sent to principal and area superintendent whether
  in answer to an ad or a drop-in at the central office
- appointments must be approved by Mr. Dobson and the Board;
  information must be sent to Mr. Dobson for this purpose
- following approval, all processing done by the personnel dept
  e.g. - acceptance of position form prepared, signed, etc.
- personnel dept must approve of the salary arrangements
  (initially determined by Sharon Pawloski and Pat Gordon)
2.2 - Transfers/Terminations:
  - transfers processed by personnel dept
  - process terminations and inform payroll

3 - Salary Administration (Rick Meade)
  - position descriptions
  - job evaluations (e.g., determination of salary range)
  - classification of positions; nb. CUPE negotiates classification for all office, clerical, personnel lay assistants
  - salary surveys
  - administration and interpretation of teaching and non-teaching salary schedule
  - payroll documentation

4 - Employee Benefits and Safety (TBA)
  - administration of group insurance plans
  - workmen's compensation
  - liaisoning with Insurance Companies
  - providing statistical data - a report prepared manually on a regular basis for Insurance Co.
  - benefit counselling of teaching and non-teaching staff (priority item)

5 - Performance Appraisal, Promotion, Organization (R. Steadman/Lloyd Dobson)
  (in cooperation with line management)
  - assessing performance: - Chiefly non-academic personnel
    - Steadman evaluates non-academic personnel
    - Dobson evaluates teaching personnel
- recommending promotions
- recommending organizational changes
- suggest policies of constructive discipline

6 - Negotiations (Resource Department for Board) (R. Steadman)
- act as resource people to the Salary and Staff Relations Committees of the Board since administration has no authority to speak for the trustees. e.g., Steadman & Townsend provide liaison between personnel and academic affairs
- provide statistical data and advise on salaries, costs, policies and procedures to Salary Committee and Staff Relations Committee (Mrs. Pawloski)
- liaison with Chairman and members of staff negotiating committees
  - Steadman - member of salary committee acting as resource person.

7 - Collective Agreements (R. Steadman)
- administer provisions
- conduct grievance hearings for non-academic staff
- suggest revisions in content and language (in new agreements)

8 - Training and Development: Non-teaching staff
- staff induction
- safety training
- supervisory training
- staff development

9 - Communications and Counselling (R. Steadman)
- communications with staff
- provide information of changes in legislation, Board policies and other matters of mutual consent
- provide counselling services on request on job opportunities and personnel problems relating to work situations
- liaise with line staff and supervisors, principals, superintendents, etc. to determine needs and provide service

10 - Personnel Records (Mrs. Ward/Mrs. S. Pawloski)
- Request, receive and maintain in confidence comprehensive records on all employees, i.e., official files:
- duplicate (may be triplicate) files on teachers; area office and schools may also have copy
- file locked and restricted to all
- accessed only with people in personnel dept

(III) PERSONNEL

(a) Organization chart: pending

(b) Responsibilities
- department staff divided into academic and non-academic staff
- 3 academic staff: Mrs. S. Pawloski (sr. person)
  Sharon Colbert (assistant to Mrs. Pawloski)
  Pat Morgan (new)
- non-academic staff: Mrs. Chapman - office & secretarial staff
  Mrs. Wei - paraprofessionals, lay assistants, etc.
- R. Steadman in charge of senior staff

(IV) PRIORITIES
- essentially equal priorities on all major areas of responsibilities but special emphasis on:
  - Negotiations
  - Employee Benefits
  - Personnel records (very important for the academic affairs office)
LEVEL 1 MEETING: FINANCE

Superintendent of Administrative Services: Bill Keith

(1) OVERVIEW

(a) Major Areas of Responsibility

1. Budget and Expenditure Control
2. Revenue
3. Payroll
4. Purchasing

(b) General

1. The interrelationship between the areas of responsibility is in the purchasing and ordering for all materials used in schools which forms the major operational link, i.e.,

Budget: allotment of monies to schools → approved by board

<table>
<thead>
<tr>
<th>Requisitions</th>
<th>Budget Control Dept: checks → EDP: encumbers order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase order</td>
<td>Purchasing Dept: purchase order</td>
</tr>
<tr>
<td>Invoice sent to accounts payable</td>
<td>Accounts Payable Dept: sends duplicate invoice to purchasing</td>
</tr>
<tr>
<td>Invoice from school</td>
<td>Receiving report sent to EDP</td>
</tr>
<tr>
<td>EDP: encumbrance deleted; sets up chart of accounts to be paid</td>
<td></td>
</tr>
<tr>
<td>Listing of accounts payable weekly</td>
<td>Checked by accounts payable</td>
</tr>
<tr>
<td>Cheques printed and sent out to suppliers</td>
<td></td>
</tr>
</tbody>
</table>
MAJOR FUNCTIONS WITHIN EACH AREA:

1. Budget and Expenditure Control (Shirley Harrison/Ken Dudman - chief accountant)
   1.1 - Budget Control:
       - board establishes budget
       - finance people control expenditures to keep within the budget
       - budget officer clears all encumbrances to budget after items received and charged to accounts payable
   1.2 - Budget Process:
       - contribution is primarily one of inputs to the process
       - i.e. provision of historical data
       - information on ceiling and revenue via liaison with the planning academic people, enrollment projections, with ministry on available funds, other sources.
   1.3 - Accounts Payable:
       - weekly listing of accounts payable - EDP

2. Revenue (Ken Dudman - chief accountant)
   2.1 - Accounts Receivable:
       - primarily billings for community use of schools
   2.2 - Acquisition:
       - ensure maximum benefit from provincial aid; i.e., find existing sources of revenue and utilize them.
       - revenue from fares, etc.

3. Payroll (Marion McDonald)
   - EDP operation
   - linkage with personnel dept. (espec. fringe benefits)

4. Purchasing (P. Porter)
   4.1 - Inventory:
       - this includes the operation of the warehouse and stockroom
4.2 - Courier Service:
   - deals with the distribution from warehouse to schools, etc.

4.3 - Printing Shop:

4.4 - Service:
   - mailroom; duplicating; switchboard
   - office services under supervision of the purchasing officer

(III) PERSONNEL

1 - Organizational chart is pending

2 - Responsibilities
   - personnel responsible for the major areas are given in Section (II)
   - detailed responsibilities will be identified in subsequent meetings

(IV) PRIORITIES

1 - Annual budget to the Board, to the Ministry

2 - functioning financial system for 1974 - especially payroll system

3 - systems development for financial system

4 - review of the manual routines and paper flow for accounts payable and purchasing, and interfacing with the computer

(V) NOTES

1 - GEAC:
   - no documentation, no run schedules
   - no run manual to determine how to extract information
   - insufficient programming ability
   - ad hoc operation
2 - Budget:
   - '74 system expanded to allow budget accounts to be broken down by
dept. and families
   - new account numbering causing problems in bringing EDP system up
to date

3 - EDP Operation:
   - payroll
   - accounts payable; weekly listings
   - general ledger: expenditure accounting, including encumbrance
system
LEVEL 1 MEETING: TRANSPORTATION

1 - Organization: - J. Brown: Superintendent of Business Affairs
    - Enid Britten: South Area Business Officer
    - Willa Woodill: North Area Business Officer

2 - General
    - contract buses; $1.5 mill expenditures
    - 11 contractors, 170 buses
    - own 2 buses
    - route design - plot with pins on map

3 - Bus Contracts
    - tender on number of buses, not students; number of students used to
determine the number of buses
    - contracts let
    - routes redesigned and assigned

4 - Operations

4.1 - Regular Runs:
    - have list of bussed students but is not up-to-date except for periodic
      head counts; list is prepared in October
    - list of special education kids always up-to-date
    - small operators handle their own routes, complaints, etc
    - otherwise complaints, regular transportation problems, etc. handled by
      Enid Britten
    - policy: - under 2 miles 'no bussing' except for
      - danger areas, illness, and K to 3 for Dec to Mar if greater
        than 1 mile
4.2 - Special Runs:
- special or extra runs over and above contractual tender
  e.g. - kindergarten
- home economics run
- special runs to the city for the handicapped
  - leave morning, return afternoon
  - mini buses deliver students to embarkation point and 2
    buses deliver students to the city

4.3 - Taxis:
- for special education kids
- handicapped
- temporary disability, i.e., broken limbs, etc.

5 - Grants:
- principals provided number of students; forms are sent directly to the
  principals from the Ministry for this purpose
- bus operators submit number of miles; forms are given to them by the
  Board
- Enid Britton compiles grant application
- recover 86% of transportation costs by the grant

6 - Problem Areas
- would like information from Special Education people earlier
- poor communication when migration - from principal
  - from spec. ed.
  - from parents
- where classes are set up.
LEVEL 1 MEETING: COMPUTER OPERATIONS

Murray Skinkle

(1) OVERVIEW

(a) Major Application Areas

1 - Financial System
2 - Payroll
3 - Tests
4 - Scheduling Reports

(b) General

- Murray Skinkle responsible for computer operation; essentially a one-man operation
- Contract out to GEAC for all services
  - Computer (Hewlett Packard); physically located at the Board
  - All support staff, programmers, systems analysts, operators, etc. provided by GEAC.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Financial Systems (B. Keith)

1.1 - Purchase Order - Routine: (P. Porter)
  - Responsibility of the purchasing dept.

1.2 - Payment of Invoices - Routine: (B. Keith)
  - Account Payable Dept

1.3 - Journal Entries - Routine: (Ken Dudman)
  - Budget/Accounting
1.4 - Trial Balances - Routine: (Ken Dudman)
   - Accounting Dept

1.5 - Ministry Reporting: (Ken Dudman)
   - Accounting Dept
   - Not a program but uses the output from the other routine to prepare the report

1.6 - Inventory Control or Stores Order: (M. Skinkle/P. Porter)
   - under development; target date Sept/74

2 - Payroll (Marion McDonald)
   - cheques produced via master program
   - new employee routine - create new records
   - proposed development of a new Payroll/Personnel file (B. Steadman)
     Ministry has tapes on all teachers' certification
   - The following reports and routines to produce them are given below:
     - TD4 routine
     - Superannuation routine
     - OMERS: Ont. Munic. Employees Retirement System (i.e., non-teaching pension plan)
     - UIC routine
     - Group Life Ins. routine
     - Taxable Benefits
     - OHIP
     - Distribution: distributes pay according to function or panel charged to
- Calculation of pay for negotiation purposes, update of
  - Payroll grid new salary levels, etc.

3 - Tests (M. Skinkle)
  - Scheduling program
  - Mark Reporting - as of Sept 1/74)

4 - Scheduling Reports (M. Skinkle)
  - secondary teacher analysis wrt periods, number of students
    taught, free-time, etc.
  - program analysis by school, by superintendent, by board

(III) PERSONNEL
- M. Skinkle is responsible for computer operations at the Board. GEAC is
  responsible for supplying all hardware and software services
- the people responsible for setting up the runs for various applications
  are given in selection (II).

(IV) PRIORITY:
- Priorities for the various applications are (1) Financial System, (2.a)
  Inventory control, (2.b) Scheduling, (3) Payroll, (4) Mark Reporting
LEVEL 1 MEETING: SPECIAL (Student) SERVICES

(1) OVERVIEW

Superintendent of Special Services: Bill Quance

(a) Major Areas of Responsibility

1 - continuing Education Services
2 - Psychological Services
3 - Attendance Counselling
4 - Special Services

(b) General

1 - The linkage between the areas is that they all are outside the normal range of services
2 - The orientation is countywide rather than school level
3 - Decentralization is occurring, consequently all field representative now answer to the field supervisors. The central officers (with the exception of Continuing Education) act as consultants to the field office
4 - Special Education is a service and not a discipline, deals with kids, teachers, parents, professional groups, etc.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Continuing Education (Walter Ward)

1.1 - administration of night school (ca.8000 registered)
   - summer school, both elementary and secondary (ca.3000 registered)
1.2 - handle referrals of drop-out students for follow-up
   - alternatives to education geared towards drop-outs or potential drop-outs (ca.125 stud)
1.3 - holiday travel/excursions:
   - mechanism for screening travel agencies:
   - credit travel program: credit course on trip abroad
     - carried out by Peel teacher staff overseas
     - usually summer school
1.4 - training of parent volunteers (elementary schools)
1.5 - coordination of correspondence schools; tutors available; use Ministry's correspondence courses
1.6 - liaison with community organizations
   e.g. community colleges to prevent overlap
   - General Council of Children's Services - representation by Board
   - regional gov't will help coordination
1.7 - career's orientation (Ernie Nielson); work experience and courses for credit

2 - Psychological Services (Ashton McKinnell)
2.1 - Traditional Function
   - psychological diagnostic service - learning difficulties due to psychological or learning disabilities (ca. 2 1/3 - 3% of student population)
   - make recommendations on instructional procedures
   - referral by principal, teacher or parents; written report accompanied by verbal discussion
2.2 - Home-School Liaison Function
   - for kids who require more intensive services
   - referred to community agencies with feedback
2.3 - General Consultative Service
   - the above 2 areas are treatment oriented, this area has impact
- on the whole system wrt all kids, with object of prevention
- workshops for teacher groups (primarily A. McKinnell)
- evaluation techniques; curriculum development
- various committees
  - e.g., Curriculum Development Council - trends, needs, implementation
  - Primary Education Task Force
  - Testing and Evaluation Program Committee - 3 to 4 year periodicity for county programs

2.4 - Volunteer Groups
- geared to a limited number of kids
- volunteers from various community organizations work individually with problem children (a one-to-one situation)
- these are lay people trained by Psychological Services
- volunteers supervised by staff
- volunteers go to the schools 2-3 times per week, mostly elementary schools
- they need all the information they can get concerning a child, therefore need parental consent
- very successful program, the support to the child is both emotional and academic
- with this kind of help over and above what a teacher can give, some children can stay in a regular class

3 - Attendance Counselling (Mrs. DesRoches)

3.1 - Counselling Services
- involves parents and students, assessing problems at home
- referrals come from principals, parents, community agencies, etc.; passed on to psychological services as necessary
- supportive casework counselling; object is to improve the living and
learning conditions of a child.

3.2 - Provincial Courts (Family Division)
- usually attendance problems - problems with parents
  - unmanageable children
  - etc.

3.3 - Liaison with Home, School and Community Agencies
- team approach, mixed disciplines
- Children's Aid, Public Health Nurse, Peel Family Services, etc.
- refer to "Annual Report of Attendance Councilling Service for 1972-73".

3.4 - Early School Leaves
- new legislation allows 14/15 year olds to leave school
- special committee set-up to handle this
- requests from parents go to this committee

4 - Special Services (Bill Quance, Bob King)
- special services is basically an accounting system for students in special programs

4.1 - Evaluation
- selection made by principal
- lack of resources requires principal to make evaluations and selections as to who will enter programs - special ed programs, summer school
- rank priorities on children entering programs
- psychological services and principals send data or child to Bill Quance (e.g. evaluation form submitted by principal)
- problem is lack of space; lack of data on teachers with special ed certificates
- nb: could use teacher file and computerized student cards.
4.2 - Budget Control
- need budget control to ensure money is used for special ed purposes;
  this money should be differentiated from the regular grant per student
- need monitoring to ensure money goes for what it was originally
  intended; this is the area superintendent's responsibility
- 1,500 vocational; 240 retarded; 1,400-1,500 in elementary; at
  least 3/4 of these schools have special ed program.

4.3 - Teacher Hiring
- make recommendations on teacher hiring

4.4 - Facilities
- could advise on type of supplies and equipment to be ordered
- where in system these are located, available and even if they exist
- monitor balanced use of facilities
- part of future planning as to requirement:

4.5 - Transportation
- establish list of special ed children before end of June - to be
  sent to transportation officer
- problem of change of address when special ed dept is not informed

(III) PERSONNEL
- Bill Quance has 4 people working for him. Their responsibilities are
  defined in Section (II).
LEVEL I MEETING : FAMILY OF SCHOOLS

1. OVERVIEW

(a) Major Areas of Responsibility

1. - Relationship with the Office of Academic Affairs
2. - General Responsibilities of the Superintendent of Family of Schools
3. - Staffing/Hiring
4. - Leadership/Development/Promotion
5. - Support Services
6. - Budget

(b) General

Family of Schools

- Pairs of Superintendents of Family of Schools are paired in field offices so that they can share the same resources.
- Each Family Superintendent handles the direct affairs of the schools in his family.
- Family Superintendents act as liaison between families, and also between schools and the Board.
- All information related to Family of Schools goes through Superintendent of Academic Affairs office (e.g. - resignations, moves, etc.)
- Each field office defines its own needs.

II. MAJOR FUNCTIONS WITHIN EACH AREA

1. - Relationship with the Office of Academic Affairs.

- Initially the function of the Office of Academic Affairs is one of monitoring and affecting change at the superintendent level and then a control function. In general, the central office is responsible for:

1.1 - Coordination and Supervision of the activities of the Family of Schools.

- The Superintendent of Academic Affairs (M. Townsend) supervises and his assistant (Lloyd Dobson) coordinates the activities of the Family of Schools.

- Lloyd Dobson chairs regular meetings of Superintendents - generates information.

1.2 - Evaluation and reporting to the Director on the performance of the Superintendent of Family of Schools.

- Lloyd Dobson chairs a committee to look at performance review, and develop a pattern relating to salary.
1.3 - Implementation of the Philosophy of the Board at the School Level.

- The Director is to develop a set of priorities based on the objectives of the superintendents.

- i.e. each family establishes its own objectives and the results are evaluated at the year's end.

2. - General Responsibilities of the Superintendent of Family of Schools.

- The emphasis in the Family of Schools: The Superintendent operates in a "democratic" fashion - feeling of "family."

- This has been done in capital expenditures, but may also go into staffing, programming, etc.

In general, the Superintendent of Family of Schools has the following responsibilities:

2.1 - Supervision, Staffing, Budgeting, as described in the previous sections.

2.2 - Professional development within the Family of Schools.

2.3 - Community Relations with:

- local trustees
- parents

2.4 - Control of Conference and Workshop Budget.

2.5 - Liaison: with other families, teacher groups.

2.6 - Evaluation of Principals:

- Part of a team of 3 members: - academic affairs representative
  - the Superintendent of the Principal
  - independent Superintendent

3. - Staffing/Hiring

3.1 - Staffing:

- Staffing requirements are based on enrolment projections supplied by the planning department and which may be modified by the Academic Affairs Office.

- Must operate within the pupil/teacher ratio set by the Board; included in the ratio are non-teaching personnel, special education and special teacher pools.
- The number of staff for each family is determined and then the
  enrollment and staffing figures are given to each Superintendent
  of a family who then distributes and assigns his staff at his
discretion.

3.2 - Hiring:
- Superintendent's office sets up process for hiring and recruitment.
- The principal does the actual interviewing and selection of a
candidate.
- The field office does the screening and official hiring.
- The problem of surplus teachers at mid-year is handled by
curtailing hiring on a discipline basis until the surplus teachers
are placed. (Handled by the central office?)
- Elementary teacher surplus is usually handled by the Family
  Superintendents.
- Requests for transfer are handled after placement of surplus
teachers but before needs for new teachers are posted.

4. - Leadership/Development/Promotion

4.1 - Promotion:
- Primary responsibility for staff evaluation rests with the
  Superintendent of Schools and principals.
- The policy is that every staff member must be evaluated every
  2 years.
- Principals evaluate teachers, then the Superintendent reviews
  and comments.

4.2 - Leadership Development:
- Leadership Development Program: Teams made up of central office
  personnel (Superintendent etc.) plus Family Superintendents and
  Principals evaluate Principals and Vice-Principals in terms of
  expectations.
- Team selects and evaluates candidates; sets tasks (experiences)
  required for development.
- The central office plays a coordinating role in the "Leadership"
  Development Program.

5. - Support Services
- Each field office has its own support services and personnel
  e.g. - consultants for specific academic areas and resource teachers
  are housed in the field offices. (Liaison with central office
- Program Superintendent responsible for area coordinators)
- Maintenance Supervisor; phys ed; etc.

- Business Officer who is responsible to the Superintendent of Business Affairs but is housed at the field office level.

6. - Budget

- Superintendent of Family of Schools responsible for budget for field office budget and review of Principal's expenditures.

- Assures it reflects the priorities of the schools art programs, etc.

- There are two main budget categories: capital current and consumable supplies.

6.1 - Capital Current:

- Distributed to schools by the field offices.

- Equipment purchases

- Minor renovations; (structural change requires approval from the central office, i.e. the Plant Office)

- Special expenditures for large items can be skimmed of the top for the Family of Schools needs.

- Allotted to an area on a per pupil basis.

- Superintendent of Schools has flexibility in allocation to specific schools.

- Formula recommendation goes through Academic Affairs and Business Office jointly.

- Staff budget committee - reviews priorities for budget items. Next year the Superintendents will present their own budgets to include all categories.

6.2 - Consumable Supplies:

- Schools receive a global budget based on a formula.

- Principal spends it to reflect priorities.

- Superintendent of Family monitors this spending.

- Also the Superintendent receives a small allocation to provide flexibility for special programs.
III. PERSONNEL

- Office of Academic Affairs:
  
  Superintendent of Academic Affairs  -  Marvin Townsend
  Assist. to Superintendent of Academic Affairs  -  Lloyd Dobson

- Family of Schools:

  There are 10 Superintendent of Schools (Family of Schools)
LEVEL 1 MEETING: SUPERINTENDENT OF ACADEMIC AFFAIRS OFFICE

(1) OVERVIEW

Superintendent of Academic Affairs: Marvin Townsend

(a) Major Areas of Responsibility

The main concern is with the quality of the academic program in the system, especially the following areas:

1 - Direction
2 - Program
3 - Assessment

(b) General

The superintendent of academic affairs has the following roles:

(1) operational - in connection with Mr. Cobson; (2) leadership - e.g. coordinat the activities of all of the superintendents of schools. Currently the operational role is emphasized rather than leadership. Once the reorganization is over, the concentration will be on leadership;

(3) interaction with Executive Committee and Board of Education (collectively/individually).

(1i) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Direction

1.1 - Major Direction:

- Major direction is with the Superintendents of the Family of Schools and to a lesser extent, the principals.

Essentially a field oriented job.
- usually a one-to-one situation where the superintendent of academic affairs talks to the superintendent of the family of schools, to discuss the board's views and coordinate superintendents' goals with the board's.
- generally try to stay away from the schools per se, the responsibility of the Family of Schools' superintendent but, periodically sit with the Headmasters' Association, refer to Section (1.2).

1.2 - Staff Involvement:
- heavy involvement with staff by informal visits to the schools with Superintendent of Schools.
- meet with the secondary principals through the Headmasters' Association executive
- meet with the elementary principals and vice-principals through the Elementary Principals' and Vice-Principal's Association
- meet with executives of E.A. and OSSTF through Executive Council.

1.3 - Evaluation:
- continuing reassessment of evaluation procedures for teaching staff to be developed in 1974-75
- nothing formal, especially after one is already on staff
- secondary principals' evaluation - a committee consisting of Headmasters, representatives, Superintendents, and L. Dobson
- elementary principals' evaluation - usually a team which includes a superintendent from the central office (Mr. L. Dobson).
- a committee is in process of developing a formal procedure
for evaluation of the Superintendents of the Family of Schools.

1.4 - Leadership Program:

- ongoing review of need for various leadership roles
  (Planning Department and Leadership Superintendent Committee).
- MLT administers program and chairs leadership teams committee meeting.
- identification of candidates
- work directly with candidates in schools, principals and superintendent of schools.
- a team of 2 visits prospective candidate, 3-4 times per year to review needs, objectives, present progress.
- ongoing leadership training (carried out by Program Dept.) (D.McVie) after annual review and planning by superintendents of schools, Leadership Committees.
- an Evaluation Program Committee has been set up which defines leadership specifications for all positions. Mr. Lambie is responsible for the process and Mr. McVie for all of the in-service and professional development that parallels the process.

2 - Program:

- program evaluation done by the Program Department and then discusses, makes recommendations to (a) Mr. Townsend,
  (b) Administrative Council.

3. - Assessment:

- meeting of 4 superintendents weekly for short term goals, immediate problems.
- Long range planning and objectives is reviewed by this group

(III) PERSONNEL

(a) Organization

- All of the Superintendents of Schools (Family) and L. Dobson, B. Quance, Bailey, D. McVie, report to M. Townsend
- The Superintendent of Planning (B. Lamble) reports directly to the Director's office but works closely with the Academic Affairs office.

(b) Responsibilities

1. Lloyd Dobson
   - Superintendent of Schools (Assistant to the Superintendent of Academic Affairs)
   - Plays the major operational role with the staff, e.g., staffing, principals' evaluation, funding of programs; chairman of the Academic Council.

2. Bill Quance
   - Superintendent of Schools (Special Services)
   - Directs chief psychologist, attendance counsellor; with his assistant B. King acts as a consultant, and with W. Ward deals with special educational services.
   - The reorganization has altered his job; he now assists the Superintendents of Schools in an advisory, consultative role. Because of the decentralized new structure, his duties now are:
     - Development of programs
     - Development of professional development program, in-service training, recruitment of staff (new).
- work in cooperation with and liaison with Superintendents of Schools
- less emphasis on operations and more on planning, policy and prof. development function in the area of special services.

3. Doug McVie
- Superintendent of school (Program)
- Involved in program and professional development
- supervision of consultative staff, recommendations re long range planning in this area.
- emphasis is to get into the schools for personal contact and input
- sharing of responsibilities with the Superintendent of Schools (Field) in determining needs, goals; concentrate more in leadership; need recognized to do more long range planning in the areas of professional development, leadership, needs re services
- supervision of Measurement and Research and Development (Judy Spigel)

4. John Bailey
- Superintendent of Schools, (Assistant to Academic Affairs Department)
- leadership role in adhoc committee work, e.g., alternatives to supply teaching, evaluation of teachers, surplus staff, interviewing of staff for responsible positions
- makes recommendations to Central Superintendents' Council re above
- liaison with OSSTF, EA etc. in ongoing studies.
5. Bill Lambie

- Superintendent of Schools (Planning)
- although is responsible directly to the Director's office, he is in close liaison with Mr. Townsend
- has the leadership role in the design to help principals and superintendents to look at long-term goals and planning
- his long-term planning activities include:
  - population projections - assistance in staffing, facilities
  - assistance of Area Superintendents on questions such as boundary changes, program, staff needs, planning for future, etc.
  - special ed. planning.

(IV) PRIORITIES

1 - Leadership Development:
- growing role in the future - as effective strategy for introducing change in system
- leadership role in education as a system rather than just school
- change in system must be at grassroots level and reflect staff needs, attitudes, input.

2 - Emphasis on the human element of administration
- must be aware that a large system can often be insensitive to many people's needs
- personalize role and contact of senior officials vis-a-vis teachers essential
3 - Quality of Program:
   - monitoring function
   - fill needs of kids and requirements of parents, Board of Education.

(V) NOTES:

1 - Possible Information Needs

1.1 - Staff Information - leadership
   - task force personnel

1.2 - Facilities Inventory:
   - upgrading of facilities - need systemwide review to establish priority for program of upgrading; library/resource

1.3 - Capability to Monitor School Expenditure: distribution of funds within family, within individual schools. Emphasis on physical rather than human resources.
LEVEL 1 MEETING: BUSINESS AFFAIRS

Superintendent of Business Affairs: Jack Brown

(1) OVERVIEW

Major Areas of Responsibility

1 - Supervision of business affairs of the Board
2 - Treasurer of the Board
3 - Executive

(11) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Supervision of Business Affairs

1.1- Functional Areas:

1.1.1- Directly report to the Superintendent of Business Affairs:

- Assistant to the Sup. of Business Affairs (Murray Skinkle); reports
directly to Jack Brown; responsible for computing services
- Personnel division
- Area Business Officers; North & South Areas; E. Britten & Willa Woodill

1.1.2- Superintendent of Business Affairs Accountable for:

- Administrative services (Bill Keith)
- Accounting services
- Plant Division (Derek Wilkinson)
- Report to trustees on all areas in the jurisdiction
- Transportation: responsible for policy and tenders. The day-to-day
  operations are handled by the 2 area business officers.

1.2 - General

- general philosophy is that academic needs must be taken into account
  and not just a business approach per se (e.g., resource allocation
based on academic needs)
- role of giving inputs to the educational program from the viewpoint of non-teacher
- Integration of educational facilities with the community:
  - view of total needs of community served by education
  - integration of community agencies to meet needs
  - advisor to Planning Dept who has the formal responsibility in this area
- Liaison with municipal agencies: knowledge of municipal personnel; contacts with municipal personnel retained; eventually Planning Dept will take over.

2 - Treasurer to the Board
- role of treasurer is to ascertain what the Board's eventual financial commitments will be
- negotiate and purchase school sites from developers
- liaison with the Ministry in obtaining financial resources.
  B. Keith is responsible for the administration of the money

3 - Executive
- executive role through membership on the executive committee and administrative council
- Executive Committee: - director, academic officer, business officer
  - held at end of each administrative council meeting and on call
  - salary negotiations (excluding the Director)
  - personnel matters, appointments
  - delicate matters
- Administrative Council:
  - executive committee members, auditor and all superintendents
meet weekly
anything to be presented to the Board is
dealt with here first

(III) PERSONNEL

3.1 - Organizational chart: available

3.2 - Responsibilities
- given in Section II

(IV) PRIORITIES

1 - all financial responsibilities

2 - provision of facilities and accommodation for growth needs

(V) GENERAL NOTES

5.1 - Linkages:

5.1.1 - Planning Department
- work with developers for yields, etc. The superintendent of
Business Affairs office is responsible for the purchase of sites.

5.1.2 - Field Offices
- administrative assistants are under the superintendent of that area
- little contact with the Superintendent of Business

5.1.3 - Internal
- Plant: design and construction people work together with Planning Dept
  Maintenance and Caretaking Dept linked to Purchasing Dept
- Payroll: linkages to everybody
- Personnel: authorizes payroll changes
- Budgeting & Accounting: administration of budget by field superintendents
  business office controls capital expenditures
- Business Superintendent & Board:
  - strong linkage
  - Board expects information from J. Brown
  - formal information transmitted via reports by operational areas

- Social linkages for good of Board:
  - Halton church extension council
  - Drug centre
  - Advisory Board of ERAS

5.2 - Critical Factors:

- School Trustees
LEVEL 1 MEETING: DIRECTOR'S OFFICE

June 5, 1974

(1) OVERVIEW

Director of the Peel Board of Education - Mr. John Fraser

(a) Major Areas of Responsibility

1 - Relationship Between Senior Administration and Elected Officials
2 - Developing Objectives and Structure of the Organization
3 - Relationship with the Community
4 - Relationship with the Ministry
5 - Leadership Role

(b) General Comment

- The Director is not responsible for the actions of the Board; he
  is not the Board's spokesman; that is the responsibility of the
  Chairman of the Board
- The Director is responsible for the operations of the system and
  implementation of the Board's policy

(2) Major Functions Within Each Area

1 - Relationship Between the Senior Administration and Elected Officials
   - most critical to develop an open relationship with trustees
   - relationship between trustees and administrators is developed
     through the following:

1.1 Standing Committees:
   - Director ensures that these committees function properly;
   - Members must be prepared for the meetings
   - Assignment of staff as members of these committees are usually
     related to staff members' areas of responsibility
1.2 Regular Board Meetings:
   - Director ensures that materials are prepared and sent to trustees in advance.

1.3 "Working Partnership" Between Board and Administrators:
   - Director's role to protect the staff in the face of the Board.
   - Director strengthens the role of the staff.

2 Developing Objectives and Structure of the Organization
   - Director has greater objectivity due to lack of vested interest.
   - Takes responsibility for the organization as it is now designed and for its productivity.

3 Relationship with the Community
   - Public relations, e.g., information to community organizations.
   - Explains what the Board is trying to do through the notion of "system", i.e., a common set of objectives for the organization as a whole.
   - Public inquiries usually come to the Director first, who then decides how and who should handle the issue.
   - Director tries not to be a member of any specific community committees, otherwise he would be inundated with these.
   - The rapid growth of the county has led to a proliferation of committees and many well-organized interest groups.
   - Director sits ex officio on committees.

4 Ministry
   - Director takes an active role when dealing with senior Ministry staff (i.e., Wells, Davis).
   - Depending on the issue, will participate in occasional meetings with regional Ministry staff.

5 Leadership
   - Issues arise which consume a great deal of time; often the Director has to react to a situation having too many unknowns.
often required to speak to federations and associations; also invited to speak in the standing committees.

- active role in leadership development of staff; he is one of two members on committees dealing with potential leaders in the system.

- handles serious personnel problems, especially when confidentiality is required.

- chairs the Administrative Council: involves setting up the agenda, sharing of information, integration of all components.

- Director coordinates all major meetings in the system to reduce conflicts; most meetings held at night.

- Director is the executive member at the regular Board meetings and also sits in on any other meetings that have important agenda items.

- attends special functions.

**Priorities**

1. Partnership with trustees - greatest need now
2. Relationship with staff
3. Relationship with the community
4. Catalyst for specific issues, e.g., major thrust in primary education.

**General Notes**

1. Circular Organization Chart:
   - information feeds in from the departments
   - system policy matters go directly to the Director
   - in cases of doubt as to whether administration or Board should take action - goes to Board as information
   - matters are referred to the standing committees for solution. If action is recommended by the committee it must be ratified by the Board. - All reports, committee resolutions, information, etc. must go via the Administrative Council before being sent to the Board.
- Director follows up on all Board resolutions.
- Ensure action is taken - a log of Board resolutions is kept.
APPENDIX B:

ACTIVITY ANALYSIS DOCUMENTS
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
</table>
| 1       | Prepare budget guidelines | 1. Budget format  
2. Expenditures - current year to-date  
-forms  
-instructions  
-expenditure summary (current year) | Supt. of Finance |
| 2       | Prepare school requests | 1. Cap-current requests  
2. Special requests  
3. Mtec. requests | 1. School requests | School staff |
| 3(a)    | Prepare Area Requests, priority rank | 1. School requests  
2. "Overheads"  
3. Budget Guidelines  
4. Consultation - Finance | 1. Area requests  
2. Requests to Departments | Superintendents - Families |
| 3(b)    | Prepare Department requests, priority rank | 1. Program requests - Dept.  
2. Program requests - areas  
3. "Overheads"  
4. Budget Guidelines  
5. Consultation - Finance | 1. Department requests (Forms BD-1, 1(a), 2(a)) | Department Heads |
| 4       | Prepare Superintendency Requests, priority rank | 1. Area requests  
2. Department requests  
3. "Overheads"  
4. Budget Guidelines  
5. Consultation - Finance | 1. Superintendent requests (Form BD-2) | Superintendents |
| 5       | Total Budget Compilation | 1. Superintendent Requests  
2. Dept. and Area Requests | 1. Budget Request | Superintendent of Finance |
| 6       | Budget Review - Internal (adjust, revise) | 1. Budget Request  
2. Consultation - Supts., Dept. Heads  
3. Revenue Estimates  
| 7       | Budget Review - F & B Comm. (Adjust, revise) | 1. Revised Budget Request  
2. Revenue Estimates  
3. Ceiling Calculations  
4. Consultation - Supts. | 1. Final Budget Request | F & B Committee |
| 8       | Budget Approval | 1. Final Budget Request | 1. Approval Budget | Board |
### BUDGET PREPARATION

**COMPONENT:** BUDGET GUIDELINES

**OBJECTIVES:**
1. Production of Effective Budget Guidelines for Whole System
2. 
3. 

### DETAILED PROCEDURE

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determination of Budget</td>
<td>Previous budget statements based on Code of Accounts, Program needs identified through feedback from Schools &amp; Superintendents, Policy Guidelines (Finance and Budget Committee)</td>
<td>Budget Categories</td>
<td>Aug. 15</td>
<td>Budget Officer and Superintendent of Finance (Central Office)</td>
</tr>
<tr>
<td>2</td>
<td>Sequencing of budget forms</td>
<td>Budget Categories, Priority determination</td>
<td>Budget preparation forms (Staff list), (Other components), (Department summary)</td>
<td>Sept. 1</td>
<td>Budget Officer and Superintendent of Finance (Central Office)</td>
</tr>
<tr>
<td>3</td>
<td>Preparing instructions</td>
<td>Budget forms</td>
<td>Instructions</td>
<td>Sept. 15</td>
<td>Budget Officer and Superintendent of Finance (Central Office)</td>
</tr>
<tr>
<td>STEP</td>
<td>DESCRIPTION</td>
<td>INPUT INFORMATION</td>
<td>OUTPUT INFORMATION</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Field Supt.</td>
<td>Field Supt.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Principal &amp; Principal for field, etc.</td>
<td>Field Supt.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Detailed Procedure Analysis**
### Detailed Procedure - Analyze S

**Area:** .1.2.1 Budget Preparation (Cont'd)  
**Component:** School Requests from Field Office

**Objectives:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input Information</th>
<th>Output Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Requests from school generated at any time and reviewed by Supt. or designate (Admin. Assist.) (upto 50%)</td>
<td>Request from school Upper limits Educational relevance to program</td>
<td>Requisition</td>
</tr>
<tr>
<td>4(a)</td>
<td>Non-allocable requests-- to Construction Dept.</td>
<td>&quot; &quot; + Rationale for need</td>
<td>Request for Estimate to Construction Department</td>
</tr>
<tr>
<td>4(b)</td>
<td>Major Requests to Supt. of Plant</td>
<td>&quot; &quot; + Rationale for need</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Requests over 50% and Supplemental held until Budget Approval</td>
<td>Field Office</td>
<td>Requisitions out automatically A.N.A. Following Budget Approval by Board (Spring)</td>
</tr>
<tr>
<td>6</td>
<td>Consider Requests over 50% of Budget--Approved Subject to Board Approval</td>
<td>Budget Approval by Board</td>
<td>Requisitions for Approval items Following Budget Approval by Board (Fall)</td>
</tr>
<tr>
<td>6(a)</td>
<td>Consider Supplemental Requests</td>
<td>Budget Approval by Board Budget Finance (Incommittted)</td>
<td></td>
</tr>
</tbody>
</table>

**Participants:**
- A.N.A.
- School and Field Office

**Location:**
- School and Field Office
<table>
<thead>
<tr>
<th>STEP</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>DESCRIPTION</td>
<td>SOURCE</td>
</tr>
<tr>
<td>1</td>
<td>Cap-Current Requests: Identification of needs, department.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Formulation of School list of facilities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Submission to Superintendent.</td>
<td>Requisition Form</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Review of Submission by Superintendent.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Special Requests: Request by Principal to Superintendent.</td>
<td>Requisition Form</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maintenance Requests: Request by Principal to Superintendent.</td>
<td>Requisition Form</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supplies: Principal submits requisition.</td>
<td>Requisition Form</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Department makes requisition.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- DETAILED PROCEDURE
- ANALYSIS

OBJECTIVE: 1 - Preparatory requests based upon budget allotment from Superintendent.

A. AREA: 1.1.2.7 BUDGET PREPARATION

COMPONENT: SCHOOL REQUESTS

SCHOOL REQUESTS:

- Superintendent
- Administrative Team
- Superintendent

TIMING:

- when budget approved
- immediately
- when budget approved
### OBJECTIVES
1. Preparation of Field Office Budget Requests
2. 
3. 

### DETAILED PROCEDURE

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Description and Definition of Budget Categories Preparation</td>
<td>Previous Budget Documents, Directives from Central Office</td>
<td>Description Document</td>
</tr>
<tr>
<td>2</td>
<td>Departments of Field Office Complete Forms</td>
<td>Description Document, Assessment of Need: (a) Past Budget, (b) Current experience, (c) Projection of needs</td>
<td>Standard Budget Form</td>
</tr>
<tr>
<td>3</td>
<td>Discussion and clarification of rationale for requests with Superintendent</td>
<td>Standard Budget Forms</td>
<td>Final Department Budget Request (Standard Form)</td>
</tr>
<tr>
<td>4</td>
<td>Collation into Field Service Budget &amp; Establish Priorities</td>
<td>Department Budget Requests (Final)</td>
<td>Field Office Request (Standard Form)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Field Office, Request Brief for Rationale of Budget Request</td>
<td>Nov.</td>
</tr>
</tbody>
</table>

### PARTICIPANTS/LOCATION

- Field Office Supt.
- Field Office Personnel
- Field Office Personnel & Supt.
- 2 Supts. & Admin. Assst. (Field Office)
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine staff</td>
<td>- Current Staff List: Staff file</td>
<td>BD1(a) completed</td>
<td>Oct.</td>
<td>Dept. Head</td>
</tr>
<tr>
<td></td>
<td>Requirements</td>
<td>- Number of New Schools: Board Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Complete Form BD1</td>
<td>BD1(a)</td>
<td>BD1 completed</td>
<td>Oct.</td>
<td>Dept. Head</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Previous Years Budget: Approved Budget Printout</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Expenditures to-date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Anticipated inflation: Business Publications and supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Anticipated needs: Age of equipment New projects current state of equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Complete Form BD2(a)</td>
<td>BD1, BD1(a)</td>
<td>BD2(a)</td>
<td>Oct.</td>
<td>Dept. Head</td>
</tr>
<tr>
<td></td>
<td>Priorities</td>
<td>- Job performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Environmental Requirements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Budgetary requests: BD1(a) BD1, BD2(a)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Detailed Procedure

### Analysis

**Area:** 1.1.5 Budget Preparation  
**Component:** Superintendent Requests

### Objectives:
1. Completion of Form BD-2  
2. Allocation of Priorities  
3. Recommended Deletions

### Step No.  
**Description**  
**Input Information**  
**Output Information**  
**Participants/Location**

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input Information</th>
<th>Output Information</th>
<th>Participants/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Compare area superintendent's request with previous year</td>
<td>Area Supts. request, Prev. years budget, Projected growth or decline in students and staff, Analysis of per pupil costs and % of budget</td>
<td>Area Supt. BD-1 etc, Budget Office, Plan Dept.</td>
<td>Approval, rejection or modification by Supt. Dec. Central Office</td>
</tr>
<tr>
<td>2</td>
<td>Submission of BD-2(a) to Budget Dept. for inclusion in draft budget</td>
<td>Back-up material from Budget forms BD-11 etc.</td>
<td>Supt.</td>
<td>For compilation into draft budget Jan. Central Office</td>
</tr>
<tr>
<td>3</td>
<td>Consideration of draft Budget</td>
<td>All budget documents</td>
<td>Budget Office</td>
<td>Submission of budget to Admin. Council and Staff Budget Comm. Feb. Central Office</td>
</tr>
<tr>
<td>4</td>
<td>Establishing priorities when reductions are required</td>
<td>Directive from Admin. Council on % or dollar reductions and from staff budget committee (specific suggestions for cuts)</td>
<td>Admin. Council Staff Budget Ctte.</td>
<td>Draft Budget recommended to Finance Committee Feb. Central Office</td>
</tr>
</tbody>
</table>

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**AREA:** 1.1.6 BUDGET PREPARATION  
**COMPONENT:** TOTAL BUDGET COMPILATION  

**OBJECTIVES:**  
1. Production of Total System Budget  
2.  
3.  

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
</table>
| 1        | Check Budget Submissions for accuracy | Budget Forms  
Staff Lists  
Payroll and Accounting Records | Corrected Budget Summaries | Nov. 1 | Budget Officer & Superintendent of Finance (Central Office) |
<p>| 2        | Compilation of summaries into a Total Budget | Corrected Budget summaries | Total Budget Request (Expenditure Summary) | Nov. 15 | Budget Officer &amp; Superintendent of Finance (Central Office) |</p>
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General Budget Overview Compilation</td>
<td>1. Budget Request</td>
<td>General Budget</td>
<td>Jan. 31</td>
<td>Supt. Finance &amp; Budget Officer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Consultation (at meeting)</td>
<td>Summary Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Revenue Estimates</td>
<td>Keith Verbal</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Ceiling Calculations</td>
<td>Accounting Dept (based on Min. Forms)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Examination of priorities</td>
<td>General Budget overview Consultation of Supts., etc.</td>
<td>Priorities established</td>
<td>Feb. 7</td>
<td>Admin. Council</td>
</tr>
<tr>
<td>3</td>
<td>Revisions of General Budget Overview</td>
<td>Priorities General Budget Overview Consultation, etc. Salary Schedule Commitments</td>
<td>Revised Budget Request</td>
<td>Feb. 14</td>
<td>Admin. Council</td>
</tr>
</tbody>
</table>

1.1.2
## DETAILED PROCEDURE

### ANALYSIS

#### OBJECTIVES:

1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>PARTICIPANTS/ LOCATION</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>DESCRIPTION</td>
<td>SOURCE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Review of priority listings and resulting revised budget request</td>
<td>1. Revised Budget Request</td>
<td>Recommend final Budget Request to Board</td>
<td>Feb. 21</td>
<td>F &amp; B Committee</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Revenue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Ceilings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Consultation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Priority Listings</td>
<td>Admin. Council</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Examination of Final Budget to Board</td>
<td>Final Budget Request</td>
<td>Approved Budget</td>
<td>Feb. 28</td>
<td>Board</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Admin. Council</td>
<td></td>
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</tr>
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</table>

*This year, steps 7 and 8 will be at one meeting of full Board + F & B Committee, so Board can vote approval at that meeting.*
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Process invoices for payment by computer systems cheque</td>
<td>Purchase Orders (copies) Invoices Receiving Reports Batches to Computer Vendor Numbers</td>
<td>lists from computer registers or listings standing Purchase Order lists Information for Budget Reports and Financial Statements</td>
<td>A/C Payable Staff A/C Payable Clerks Chief Accountant Purchasing Dept. Budget Schools Admin. Staff Gen'c Suppliers</td>
</tr>
<tr>
<td></td>
<td>Process Cheques Requisitions re: Petty Cash reports Mileage Claims Expense Claims Other Claims by computer systems cheques</td>
<td>Standard forms Batch to computer</td>
<td>Same as above and integrated in edit lists, etc.</td>
<td>As above</td>
</tr>
<tr>
<td></td>
<td>Manual Cheques by Typewriter</td>
<td>As above</td>
<td>As above</td>
<td>As above</td>
</tr>
</tbody>
</table>

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## 2.2 Accounts Receivable and Revenue

### Description

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input</th>
<th>Output</th>
<th>Participants/ Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Misc. Revenue</td>
<td>Memos, Forms</td>
<td>Official Receipts: Bank Statements, Edit lists from Computer, Revenue portion of financial statements, Reports to Ministry</td>
<td>Accounting Dept., A/C Rec., Cashier, Accountant, Chief of Account, Schools, Admin, Staff, Ministry</td>
</tr>
<tr>
<td></td>
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<td>Rental Permits, Caretakers overtime reports, Revenue from Rentals</td>
<td>Invoices for rental, Official receipts, Billing Summaries, Journal entries</td>
<td>Area Business Offices, Regional Business Officer and staff as above</td>
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<td>Schools &amp; Facilities</td>
<td>Regulations, form work sheets, Assessment Information, Enrolment Information</td>
<td>Grant calculation forms, portion of financial statements - Current Estimates for next year</td>
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<td>Deposits, Cheques issued, etc.</td>
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<td>Cheque Cancellations</td>
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<td>General Ledger Account Analysis</td>
<td>Computer Print-out of Trial</td>
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<td>Balances and Transactions</td>
<td>Back-up re: Financial Statement</td>
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<td>and year end</td>
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<td>Bank Reconciliations</td>
<td>Cheque cashed through bank A/C</td>
<td>Reconciliation Statements</td>
<td>A/C Rec.</td>
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<td>Capital Accounting for all Capital Projects financed by Debenture</td>
<td>Board resolutions re: Projects approval Borrowing Debentures Requests for payment for contract drawings, architect fees, etc. P.O.s for equipment, etc. Invoices for payment</td>
<td>O.M.B. Applications O.E.C.A. Applications Debentures Bank Borrowing Cheques Capital statements Trial Balances &amp; General Ledger Transactions from Computer</td>
<td>Planning Dept. Construction &amp; Design Supt. of Plant Supt. of Finance Supt. of Admin. Services Capital Accountant Chief Accountant</td>
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<td>Preparation of all input to Computer relative to issuing Salary Cheques</td>
<td>Reports and forms from Personnel Dept., Overtime reports, Absentee reports, Casual employee time reports, Various other reports and Standard Forms</td>
<td>Salary Cheques, T4 Slips, Various Reports</td>
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| Monitor Planned Development | 1. Developer's brief  
2. Plan for Sub-Div. registration  
3. Facilities inventory | 11. Facility Needs  
12. Site Analysis | Planning |
| Site Selection | 1. Facility Needs (A. 11)  
2. Site Analysis (A. 12)  
3. Inventory of Sites | 11. Site Designation Agreement  
12. Site Selection  
13. Site Purchase Agreement  
14. Ministry Approval  
(a) site  
(b) purchase  
15. OMB Approval (financing) | Planning |
| Establish Capital Program | 1. Facility Needs (A. 11)  
2. Demographic Stats  
3. Current Enrolment  
4. Facilities Inventory (A. 3)  
5. Facilities standards  
6. Enrolment Projections  
7. Reliable/replacement needs  
8. Ministry guidelines  
12. Capital Program  
(a) Project descriptions  
(b) Priorities  
(c) Cost est.  
(d) Need justification  
(e) Architects  
(f) F & E est.  
(g) Approvals | Planning |
| Project Proposal | 1. Project briefs (C. 11)  
12. Facility Proposal  
13. Cost Est.  
14. Ministry Approval  
15. OMB Approval | Planning/Buildings |
### 4.1 Accommodation Supply: Capital Program (Cont'd)

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<tr>
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<td>F &amp; E Specs. &amp; Costs (G. 14)</td>
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<td>12. Inspection Reports</td>
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<td>Construction Specs. (F. 12)</td>
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<td>6.</td>
<td>Ministry Approval</td>
<td>(a) site</td>
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<td>7.</td>
<td>(b) purchase (B. 14)</td>
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<td>(B. 15)</td>
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<td>Building Permits</td>
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### Area: 4.1.1 Accommodation Supply - Capital Component: Monitor Housing Development

#### Program

**Objectives:**
1. 
2. 
3. 

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<tr>
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<tr>
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<td>Project student yield (Greeniaus)</td>
<td>Housing yield factors, Local Planning Board</td>
<td>Projected Yield, Comment on Draft Plan (Letter)</td>
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<td>Facility Needs Analysis</td>
<td>Draft Plan of subdivision, Ministry of Housing</td>
<td>Planning</td>
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<td>2</td>
<td>Current Enrolment</td>
<td>Projected Yield, Planning Yield, Projectn, Schools</td>
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<td>Family of Schools</td>
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<td>Enrolment Projection (3 yr)</td>
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<td>Available facilities</td>
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<td>List of Proposed/Reg. Subdivisions</td>
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<td>Planning</td>
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**Participants/Location:**
- Planning
## AREA: 4.1.1 ACCOMMODATION SUPPLY - CAPITAL COMPONENT: MONITOR HOUSING DEVELOPMENT

### OBJECTIVES:
1. 
2. 
3. 

### DETAILED PROCEDURE ANALYSIS

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### OUTPUT INFORMATION

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**PARTICIPANTS**

1. Planning
2. Planning
3. Planning
## Area: 4.1.2.1 Accommodation Supply  
### Component: Site Purchase

### Objectives:
1. 
2. 
3. 

### Detailed Procedure Analysis

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<td>Prepare site purchase Res'n (Greeniaus)</td>
<td>Site Purchase Agreement</td>
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<td>Appr'd Capital Allocation (site $)</td>
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<td>Approval of Site Purchase (Board)</td>
<td>Site purchase resolution</td>
<td>Approved Site Purchase resolution</td>
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<td>Commission site appraisal</td>
<td>Approved site purchase resolution</td>
<td>Site Appraisal</td>
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<td>Prepare Instructions to Lawyer</td>
<td>Approved site purchase resolution</td>
<td>Legal Documentation</td>
<td>Lawyer</td>
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<td>Prepare OMB application (Chief Accountant)</td>
<td>Approved Site Purchase resolution</td>
<td>Request for $ OMB Application to approve site purchase</td>
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<td>OMB Approval to Purchase</td>
<td>Application to OMB</td>
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### Particpants/Location:
- Planning
- Board
- Planning
- lawyer
- Lawyer
- Finance
- OMB
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<td>Projected Yields from new development, Current Birth Rates, School Projections, Current 3-year Projections, Available Facilities, Current Enrolment (Separate), Current Enrolment (Public)</td>
<td>3-Year Enrolment Projection</td>
<td>Twice, Planning</td>
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<td>Estimate Cap</td>
<td>Facility Needs</td>
<td>Facility Needs Cost Estimate</td>
<td>Monthly, Planning</td>
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<td>Costs, Establish Priorities</td>
<td>Site Purchase Agreements, Grant Regulations (const. $, F/E $)</td>
<td>Facility Needs Priority Ranked</td>
<td>July-Sept., Planning</td>
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<td>Proposed Cap. Program, Board Revisions</td>
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<td>Approved Bldg. Allocation</td>
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<td>Approved Cap. Program, General Specs.: Educational</td>
<td>Project Briefs</td>
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<td>Planning</td>
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## AREA: 4.1.4 ACCOMMODATION SUPPLY  
## COMPONENT: PROJECT PROPOSAL

### OBJECTIVES:
1. 
2. 
3. 

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<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
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</thead>
</table>
| 1        | Prepare coop Needs (Planning) | Cap. Program (Interim or Final)  
Project Brief  
Needs Analysis  
Current Enrolment (Pub.)  
Current Enrolment (Sep.)  
Enrolment Projections  
Population Age Distri. | Cooperative Needs Study (Form) |
| 2        | Prepare Building Proposal (Design and const.) | Capital Program (Interim or Final)  
Project Brief  
Site Detail  
Con'1 Spec's: Educ.  
Capital Grands Plan | Building Proposal (Form)  
Site Detail  
Utility Requirements  
Building Detail and Notification |
| 3        | Prepare Project Proposal (Planning) | Coop. Needs Study  
Building Proposal | Project Proposal |
| 4        | Project Proposal Approval (Ministry) | Project Proposal | Approved Project Proposal |
| 5        | Establish Prov. Acct. (Finance) | Approved Proj. Proposal  
Planning | Project Acct. |
| 7        | Commission site Survey (D & C) | Site Detail  
D & C | Site Survey |

**Participants:** Planning  
**Location:**
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<th>OUTPUT INFORMATION</th>
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<td>3.</td>
<td></td>
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<td>8</td>
<td>Establish Site Development Requirements (D &amp; C)</td>
<td>Site Survey, Building Proposal</td>
<td>Site Development Requirements (To Architect)</td>
<td>Surveyor</td>
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<td>9</td>
<td>Instruct Architect</td>
<td>General Instructions to Architect, Site Development Requirements, Site Survey, Site Detail, Project Brief, Name of Architect, Unit Cost Guidelines, Required Date of Occupancy, Project Supervisor</td>
<td>Confirmation of Commission Instructions to Architect, Project Brief</td>
<td>Planning</td>
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**DETAILED PROCEDURE ANALYSIS**

**AREA:** 4.1.4 ACCOMMODATION SUPPLY **COMPONENT:** PROJECT PROPOSAL (Cont'd)
### Detailed Procedure

**Area:** 4.1.5 Accommodation Supply  
**Component:** Design I - Sketch Plans

**Objectives:**
1. 
2. 
3. 

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<tr>
<td>1</td>
<td>Approve Arch./Eng. Consultants (D &amp; C)</td>
<td>List of Proposed Arch./Eng. Consultants</td>
<td>Approved list of arch./eng. consultants</td>
<td>D &amp; C</td>
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</table>
| 2        | Prepare Sketch Plans | Approved Consultants  
Various buildings  
standards (const., health, etc.)  
Consultation-Bd. Staff  
Consultation-Pks./Rec. Library Board | Approved Sketch Plans | Architect  
Bd.-Arch.  
Library Board |
| 3        | Sketch Plan | Sketch Plans | | |
| 4        | Approval (1) P & B Comm  
(2) Board | Approved Sketch Plans  
Current Enrolments  
Coop Needs Report | Approved Sketch Plans | Board  
Planning |
| 5        | Update Needs Study (Planning) | Approved Sketch Plans | Enrolment Projection for new school | Planning |
| 6        | Prepare Ministry Submission | Approved Sketch Plans  
Enrolment Projection  
Capital Grants Plan  
Reference Const. Costs | Sketch Plan Submission | 1-Sketch Plans  
2-Projections  
3-Cost estimates | D & C |

**Notes:**
- **INPUT INFORMATION** includes the description of input information, its source, and timing.
- **OUTPUT INFORMATION** includes the description of output information and its participants and location.
- **PARTICIPANTS LOCATION** includes the names of the participants involved in the step and their locations.
**AREA: 4.1.6 ACCOMMODATION SUPPLY**  
**COMPONENT: DESIGN II - WORKING DRAWINGS**

**OBJECTIVES: 1.**

**2.**

**3.**

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Prepare Working Drawings Constr. Specs. (Architect)</td>
</tr>
<tr>
<td>2</td>
<td>Approval - Working Drawings Constr. Specs. (Board)</td>
</tr>
<tr>
<td>3</td>
<td>Update Needs Study (Planning)</td>
</tr>
<tr>
<td>4</td>
<td>Prepare Ministry Submission</td>
</tr>
</tbody>
</table>

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<tr>
<th>INPUT INFORMATION</th>
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<th>SOURCE</th>
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<tbody>
<tr>
<td></td>
<td>Approved Sketch Plans (Board and/or Ministry)</td>
<td>D &amp; C</td>
</tr>
<tr>
<td></td>
<td>Fire Marshalls Requirements Recommendation--other agencies</td>
<td>Fire</td>
</tr>
<tr>
<td></td>
<td>WOR Health Environ.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Working Drawings/Specs Approvals--other Agencies</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approved Drawings/Specs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Notification of approval of working/ drawings Coop Needs Study Current Enrolments</td>
<td>Board</td>
</tr>
<tr>
<td></td>
<td>Enrolment Projection</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Working Drawings Submission (to Ministry)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTPUT INFORMATION</th>
<th>DESCRIPTION</th>
<th>TIMING</th>
<th>PARTICIPANTS</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working Drawings/const. specs Approvals--other Agencies Approvals--Fire Marshalls Notification Required Fire Revisions</td>
<td>Architect</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Approved Drawings/Specs.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working Drawings Submission (to Ministry)</td>
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</tbody>
</table>
### Area: 4.1.7 Accommodation Supply

**Component:** Final Project Approval

**Objectives:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
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<tbody>
<tr>
<td>1</td>
<td>Call Tenders (D &amp; C)</td>
<td>Approved Drawings/Specs Standard Tender forms/Procedures Ministry D &amp; C</td>
<td>Tendered Bids</td>
<td>D &amp; C Contracts</td>
</tr>
<tr>
<td>2</td>
<td>Analyse Bids (D &amp; C)</td>
<td>Tendered Bids</td>
<td>Recommend Contractor</td>
<td>D &amp; C</td>
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<tr>
<td>3</td>
<td>Board Approval of Contract</td>
<td>Recommendations D &amp; C</td>
<td>Approved Contract</td>
<td>D &amp; C</td>
</tr>
<tr>
<td>4</td>
<td>Final Update Needs (Planning)</td>
<td>Approved Contract Coop Needs Study Current Enrolments</td>
<td>Enrolment Projection</td>
<td>D &amp; C</td>
</tr>
<tr>
<td>5</td>
<td>Prepare Ministry Submission (D &amp; C)</td>
<td>Approved Contract Enrolment Projection</td>
<td>Final Project Submission</td>
<td>D &amp; C</td>
</tr>
<tr>
<td>6</td>
<td>Ministry Approval (Ministry)</td>
<td>Final Project Submission</td>
<td>Approval of Project</td>
<td>D &amp; C</td>
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<td>---------------------------------------------</td>
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<tr>
<td></td>
<td>Operations</td>
<td>Budget</td>
<td>Ensuring cleanliness and efficient operations of Physical Plant and Grounds</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supervisor of Maintenance &amp; Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Area Supervisors of Maintenance &amp; Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Caretaking Staff</td>
<td></td>
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</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
<td>INPUT</td>
<td>OUTPUT</td>
<td>PARTICIPANTS/LOCATION</td>
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<td>---------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td></td>
<td>Central Cap/Current Projects</td>
<td>Budget</td>
<td>Various capital improvements to Buildings &amp; Grounds</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Principals and Field Superintendents</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maintenance Dept.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Detailed Procedure Analysis

#### Area: 5.1.3 Plant Operations

**Component:** Preparation of Department Budget Request

**Objectives:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input Information</th>
<th>Output Information</th>
<th>Participant/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine salary cost of present personnel</td>
<td>Payroll print-out</td>
<td>Total committed salary cost</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>2</td>
<td>Determine future personnel requirements and salary costs</td>
<td>List of new facilities, Date of completion</td>
<td>List of new personnel required and salary cost</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>3</td>
<td>Determine supply requirements for future facilities</td>
<td>Monthly budget print-out, Design &amp; Const.</td>
<td>Total committed supply cost and inflation factor</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>4</td>
<td>Determine supply requirements for future facilities</td>
<td>List of new facilities, Date of completion</td>
<td>Total supply cost for future growth, including inflation</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>5</td>
<td>Determine equipment to be replaced</td>
<td>Survey report on existing equipment</td>
<td>Total cost of replacement equipment</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>6</td>
<td>Determine new equipment needed</td>
<td>Survey report on existing equipment</td>
<td>Total cost of new equipment needed</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>7</td>
<td>Determine cost of sundry smaller budgets</td>
<td>Monthly budget print-out, Computer Service</td>
<td>Total committed cost plus inflation</td>
<td>Oct. 31</td>
</tr>
<tr>
<td>8</td>
<td>Determine committed cost of contractual services</td>
<td>Department Records, Sec.</td>
<td>Total committee cost plus inflation</td>
<td>Oct. 31</td>
</tr>
</tbody>
</table>
**AREA:** 5.1.3 PLANT OPERATIONS (cont'd)  **COMPONENT:** PREPARATION OF DEPARTMENT BUDGET REQUESTS

**OBJECTIVES:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Determine contractual services required for growth</td>
<td>List of new facilities&lt;br&gt;Date of completion</td>
<td>Total cost of future contractual services</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
</tr>
<tr>
<td>10</td>
<td>Prepare detailed budget forecast</td>
<td>All input previously listed</td>
<td>Total budget forecast</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
<td>INPUT</td>
<td>OUTPUT</td>
<td>PARTICIPANTS/ LOCATION</td>
<td></td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------</td>
<td>------------------------</td>
<td></td>
</tr>
</tbody>
</table>
| 2       | Maintenance of all Physical Plan and grounds | Supervisor of Maintenance & Operations  
Teaching Staff  
Caretaking Staff  
Asst, Supervisor Maintenance (Planned Maintenance)  
Maintenance Budget | Preservation of Capital Assets |                                                      |
<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.2.1</td>
<td>Project Request</td>
<td></td>
<td>Project File</td>
<td>Supervisor of Maintenance Engineering</td>
</tr>
<tr>
<td>5.2.2</td>
<td>Project Investigation</td>
<td>1. Breakdown Notification</td>
<td></td>
<td>Supervisor of Maintenance Engineering</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Cap-Current (Family) Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Maintenance Programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(a) Programmed Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(b) Cap-Current (Cent)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Capital Programs Sub-Contracts</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Project File (P.F.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.3</td>
<td>Project Authorization (optional)</td>
<td>Request for Authorization</td>
<td>1. Project Authorization</td>
<td>Originator of Project Request</td>
</tr>
<tr>
<td>5.2.5</td>
<td>Project Schedule</td>
<td>1. Specs/drawings</td>
<td>1. Project Authorization</td>
<td>Maintenance Engineering</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Contract award(s) (from P.F.)</td>
<td>2. Item for next year's Budget Consideration</td>
<td>Purchasing Dept.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3. Item for next year's Budget Consideration</td>
<td>Maintenance Engineering</td>
</tr>
<tr>
<td>5.2.6</td>
<td>Carry Out Works</td>
<td>1. Signed-off Work Order</td>
<td></td>
<td>Maintenance Engineering</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Work Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Work Schedule (P.F.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.7</td>
<td>Budget Preparation</td>
<td></td>
<td>1. Closed-out Project File</td>
<td>Maintenance Programs, Budgets</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2. Authorized final payments</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3. Closed-out Project File</td>
<td></td>
</tr>
</tbody>
</table>
### Detailed Procedure Analysis

**Area:** 5.2.7 Plant Maintenance  
**Component:** Preparation of Department Budget Requests

**Objectives:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
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<th>Source</th>
<th>Output Information</th>
<th>Timing</th>
<th>Participants/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine salary cost of present personnel</td>
<td>Payroll print-out</td>
<td>Payroll</td>
<td>Total committed salary cost</td>
<td>Oct. 31</td>
<td>Supervisor (Maintenance &amp; Operations)</td>
</tr>
<tr>
<td>2</td>
<td>Determine future personnel requirements and salary costs</td>
<td>List of new facilities, Date of completion</td>
<td>New Design &amp; Const.</td>
<td>List of new personnel required and salary cost</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
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<tr>
<td>3</td>
<td>Determine supply requirements for future facilities</td>
<td>Monthly budget print-out</td>
<td>M.S.K.</td>
<td>Total committed supply cost and inflation factor</td>
<td>Oct. 31</td>
<td>supervisor (M &amp; O)</td>
</tr>
<tr>
<td>4</td>
<td>Determine supply requirements for future facilities</td>
<td>List of new facilities, Date of completion</td>
<td>New Design &amp; Const.</td>
<td>Total supply cost for future growth, including inflation</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
</tr>
<tr>
<td>5</td>
<td>Determine equipment to be replaced</td>
<td>Survey report on existing equipment</td>
<td>Area Supervisors</td>
<td>Total cost of replacement equipment</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
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<td>Survey report on existing equipment</td>
<td>Area Supervisors</td>
<td>Total cost of new equipment needed</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
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<td>Determine cost of sundry smaller budgets</td>
<td>Monthly budget print-out</td>
<td>M.S.K.</td>
<td>Total committed cost plus inflation</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
</tr>
<tr>
<td>8</td>
<td>Determine committed cost of contractual services</td>
<td>Department Records</td>
<td>Sec.</td>
<td>Total committed cost plus inflation</td>
<td>Oct. 31</td>
<td>Supervisor (M &amp; O)</td>
</tr>
</tbody>
</table>
### Objectives:
1. 
2. 
3. 

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<th>OUTPUT INFORMATION</th>
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<tr>
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</tr>
<tr>
<td>10</td>
<td>Prepare detailed budget forecast</td>
<td>All input previously listed, Dept. Records</td>
<td>Total budget forecast</td>
</tr>
</tbody>
</table>

**Timing:**
- Oct. 31

**Participants/Location:**
- Supervisor (M & O)

**Source:**
- New Design & Const.
- Dept. Records
## Overview

**Management Area:** 6.1 Transportation

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input</th>
<th>Output</th>
<th>Participants/Location</th>
</tr>
</thead>
</table>
| 1        | Prepare invitation to tender school and disseminate instructions, etc. | 1. School boundaries  
2. Transportation Policy  
- regular students  
- special  
- winter bus (additional)  
- Home Ec. & Ind. Arts  
- kindergarten  
- summer school | 1. Procedures for schools  
- forms  
- instruction | Business Officers |
| 2        | Prepare list of pupils eligible for transportation | School O.S.R. | List of pupils eligible for transportation | School |
| 3        | Plot pupils | List of pupils eligible for transportation | Plotted pupils (map) | Business Officers |
| 4        | Design Routes | Plotted pupils  
Bus loading factors | Designed routes | Business Officers |
| 5        | Determine number of buses | Designed routes | Estimate buses by route | Business Officers |
| 6        | Analysis of Tenders | Number of Buses  
Submitted tenders  
List of Contractors | Transportation tender spec.  
Recommended tenders | South Business Officer and Admin. Council |
| 7        | Tenders | Submitted bus tenders  
(Board accepts/rejects) | Recommendations | Business Officers |
| 8        | Transportation Contracts Awarded (promised) | Recommended Tenders | Contracts Awarded (promised) | Board 163 |
| 9        | Bus Routes Designated | Awarded Transportation Contracts | Distribution of Bus Routes | Business Officers |
| 10       | Adjustments of bus routes (extra buses) | Additional student enrollment | Distribution of Bus Routes | Business Officers |
### AREA: 6.1.1 TRANSPORTATION
### COMPONENT: REGULAR BUSING

**OBJECTIVES:**
1. Determination of Student Eligibility for Busing
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>DESCRIPTION</td>
<td>SOURCE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>1</td>
<td>STUDENT ELIGIBILITY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Map changes in school boundaries (if any)</td>
<td>School Boundary changes</td>
<td>Board Minutes</td>
<td>Updated school and road network map</td>
</tr>
<tr>
<td>1.2</td>
<td>Establish 2-mile limit for each school (on map)</td>
<td>Updated schools map</td>
<td>As above</td>
<td>Mapped 2-mile limit</td>
</tr>
<tr>
<td>1.3</td>
<td>Compile lists (by school) of streets eligible for transportation</td>
<td>Mapped 2-mile limit</td>
<td>&quot;</td>
<td>List of streets eligible for regular transportation, (by school)</td>
</tr>
<tr>
<td>1.4</td>
<td>Update Transportation Policy instructions to schools (if any)</td>
<td>Changes in transportation policy</td>
<td>&quot;</td>
<td>School Transportation policies forms (1), instructions to schools</td>
</tr>
<tr>
<td>1.5</td>
<td>Prepare request for Home Ec. &amp; Ind. Arts schedule</td>
<td>List of schools with H.E. &amp; Ind. Arts Facilities, changes in policy</td>
<td>Files, Board Minutes</td>
<td>Request for Home Ec. &amp; Ind. Arts Sept. schedule</td>
</tr>
<tr>
<td>1.6</td>
<td>Plot students on road map</td>
<td>Completed school lists (or maps) of students eligible for transportation - grouped either (by street preferably) of alphabetically</td>
<td>School Principals</td>
<td>Maps showing distribution of students eligible for transportation</td>
</tr>
</tbody>
</table>
## AREA: 6.1.2 TRANSPORTATION

### COMPONENT: REGULAR BUSING

#### OBJECTIVES:
1. Route Design
2. 
3. 

### DETAILED PROCEDURE

#### ANALYSIS

<table>
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<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/ LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Design bus routes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(1) Secondary</td>
<td>a) Plots of eligible students</td>
<td>Initial Design of Routes</td>
<td>End of</td>
<td>To school Principals</td>
</tr>
<tr>
<td></td>
<td>(2) Elementary</td>
<td>b) Current routes</td>
<td>- route maps</td>
<td>July</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Optimize bus usage</td>
<td>c) Route timing</td>
<td>- number of buses required</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>determine number of buses required</td>
<td></td>
<td>- number of students per bus</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>d) Bus loading factors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>e) Transit timetables, maps</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Compile Master Routes, Allocate Bus Privilege Cards</td>
<td>a) Output of 2.1</td>
<td>Master Routes</td>
<td>End of</td>
<td>To school Principals</td>
</tr>
<tr>
<td></td>
<td>Allocate Transit Tickets (Secondary)</td>
<td>b) Provisional designated routes &amp; operations</td>
<td>Bus privilege cards</td>
<td>August</td>
<td>Principals</td>
</tr>
<tr>
<td>3</td>
<td>Adjustment of Routes (because of increased quantity transients or immigration)</td>
<td>Master Routes</td>
<td>Adjusted Master Routes</td>
<td>Sept.</td>
<td>Designated Operators</td>
</tr>
<tr>
<td></td>
<td>- add new routes if required</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- inform operators</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- distribute extra Bus Privilege Cards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Excess students on buses</td>
<td>Driver survey</td>
<td>Information re new routes</td>
<td>End of</td>
<td>172</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sept.</td>
<td></td>
</tr>
</tbody>
</table>
**Area:** 6.1.3 TRANSPORTATION  
**Component:** REGULAR BUSING

**Objectives:** 1. Transportation Contract Negotiations  
2.  
3.  

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input Information</th>
<th>Output Information</th>
<th>Timing</th>
<th>Participants / Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Prepare invitation to tender for bus contracts</td>
<td>List of bus operators, Previous years' conditions of tendering</td>
<td>Conditions of tendering, Application forms</td>
<td>Early March</td>
<td>Advertise &amp; tender to current bus operators</td>
</tr>
<tr>
<td>2</td>
<td>Analysis of Tenders</td>
<td>Operators' Tenders, Current contracts, Records of Operators' previous service and performance</td>
<td>Recommended Tenders (Operators &amp; number of buses)</td>
<td>Early April</td>
<td>Tendering to Operators</td>
</tr>
<tr>
<td>3</td>
<td>Contracts Awarded &amp; Bus Routes Designated</td>
<td>Recommended and approved tenders</td>
<td>Notification of accepted tenders and provisional routes designated</td>
<td>End of April</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Adjust Accounting on Contracts (after route modifications)</td>
<td></td>
<td></td>
<td>End of Sept.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Contracts Finalized</td>
<td>Provisional contracts and adjustments</td>
<td>Final Contracts</td>
<td>End of Sept.</td>
<td>To bus operators</td>
</tr>
</tbody>
</table>
**AREA:** 6.1.4 TRANSPORTATION  
**COMPONENT:** REGULAR BUSING

**OBJECTIVES:**
1. Transportation budgeting
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total Expenditures Estimated and Compared with Projected</td>
<td>Projected Transportation Expenditures (last year)</td>
<td>Files</td>
<td>Estimate of percentage increase in operation prices</td>
<td>Mid-Oct.</td>
</tr>
<tr>
<td>2</td>
<td>Project next year's budget requirements</td>
<td>Estimate of percentage increase in operation prices above</td>
<td></td>
<td>Budget request for next year</td>
<td></td>
</tr>
</tbody>
</table>

**Detailed Procedure Analysis**

**Input Information**
- Projected Transportation Expenditures (last year)
- Files

**Output Information**
- Estimate of percentage increase in operation prices
- Budget request for next year

**Timing**
- Mid-Oct.
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>PARTICIPANTS, LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>DESCRIPTION</td>
<td>SOURCE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>1</td>
<td>1. Request special student information from special services</td>
<td>Special class student forms (5), names, addresses, birthdates, home, school</td>
<td>special services personnel</td>
<td>Plotted special students</td>
</tr>
<tr>
<td>2</td>
<td>2. Plot all special students</td>
<td>Current map</td>
<td>Files</td>
<td>Route maps and schedules</td>
</tr>
<tr>
<td>3</td>
<td>3. Design new routes, and/or adjust regular routes (rural)</td>
<td>Current Master routes (regular transportation), Route maps</td>
<td>Files</td>
<td>Drivers lists of special students, ie. names, addresses, school, of each</td>
</tr>
<tr>
<td>4</td>
<td>4. Draw up drivers' schedules and student lists</td>
<td>Operators' contracts, Route maps and schedules</td>
<td>Files</td>
<td>Individual instructions to special student&lt;br&gt;- route&lt;br&gt;- timing&lt;br&gt;- operator&lt;br&gt;- bus number&lt;br&gt;- telephone numbers</td>
</tr>
<tr>
<td>5</td>
<td>5. Write to all special students giving their instructions for transportation</td>
<td>Special student, names, addresses, routes</td>
<td>step above</td>
<td>To each driver on special route</td>
</tr>
</tbody>
</table>
### TRANSPORTATION (Cont'd)

**COMPONENT:** SPECIAL STUDENTS

#### OBJECTIVES:
1. 
2. 
3. 

#### DETAILED PROCEDURE ANALYSIS

<table>
<thead>
<tr>
<th>STEP 6</th>
<th>DESCRIPTION</th>
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<td>Input Information</td>
<td>Output Information</td>
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<tr>
<td>Description</td>
<td>Source</td>
</tr>
<tr>
<td>Update special student lists in accordance with responses to individual letters (previous step)</td>
<td>Correspondence re: changes of address, deceased, etc.</td>
</tr>
<tr>
<td>- Cross untraced/moved students off respective bus lists</td>
<td></td>
</tr>
<tr>
<td>- Make enquiries of special services to trace such students</td>
<td></td>
</tr>
<tr>
<td>- Inform operators of changes</td>
<td></td>
</tr>
</tbody>
</table>

**179**

**180**
<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>PARTICIPANTS, LOCATION</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Plot morning shift Kinderergarten students (with the regular students)</td>
<td>Kindergarten Registrations - names - addresses (or map) - shift</td>
<td>Morning take-home schedules and afternoon pick-up and take-home schedules</td>
<td>To each driver</td>
</tr>
<tr>
<td>2</td>
<td>Regular Route design (see Regular Busing 2.1)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Design take-home routes for morning shift, and afternoon collection and take home routes (if any)</td>
<td></td>
<td>Names, addresses (or map) of all kindergarten students on his route</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Compile Kinderergarten students list (or map) for bus drivers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### AREA: 6.4 TRANSPORTATION
### COMPONENT: WINTER BUS SCHEDULING

**OBJECTIVES:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
<th>TIMING</th>
<th>PARTICIPANTS, LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Establish 1-2 mile limit for each school</td>
<td>Current map with boundaries</td>
<td>Map with 1-2 mile limit plotted</td>
<td>After Sept.</td>
<td>To each school with (K-3)</td>
</tr>
<tr>
<td>2</td>
<td>Compile list of streets eligible for winter bus transportation</td>
<td>Output of step 1.</td>
<td>List of streets eligible for winter bus transportation (plus instructions, forms)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Plot eligible students on road map</td>
<td>Lists (or maps) of eligible student names, addresses</td>
<td>Plot of eligible students</td>
<td>End of Oct.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Design additional routes or make modifications to regular</td>
<td>Master routes or Bus Maps (3)</td>
<td>New routes and timing - number of buses required - number of taxis</td>
<td>End of Oct.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Inform contractors and allocate bus privilege cards to schools</td>
<td>New routes, etc.</td>
<td>Winter bus routes, time and instructions</td>
<td></td>
<td>To school principals &amp; bus and taxi operators</td>
</tr>
</tbody>
</table>
### Detailed Procedure Analysis

**Area:** 6.5 Transportation  
**Component:** Home Economics & Industrial Arts

**Objectives:**
1. 
2. 
3. 

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT INFORMATION</th>
<th>OUTPUT INFORMATION</th>
</tr>
</thead>
</table>
| 1        | Allocate Home Economics & Industrial Arts runs to Operators - i.e., lowest bids | Home Economics & Industrial Arts Program Schedule  
Operator's Tenders for prices tendered | Principal in Home Facility School  
Home Economics & Industrial Arts bus routes and timing |

**Timing:** April
### Detailed Procedure Analysis

**Area:** 6.6 Transportation  
**Component:** Ministry Reports

**Objectives:**
1.  
2.  
3.

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Description</th>
<th>Input Information</th>
<th>Output Information</th>
<th>Timing</th>
<th>Participants Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check and correct ME 301's</td>
<td>ME 301's - Principals Report on Transportation of Pupils</td>
<td>School Principal Corrected ME 301's</td>
<td>By Oct. 31</td>
<td>To Ministry of Education</td>
</tr>
<tr>
<td>2</td>
<td>Summarize ME 301's on ME 302</td>
<td>Corrected ME 301's</td>
<td>Step 2 Above ME 302 - Board Transportation Summary</td>
<td></td>
<td></td>
</tr>
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</table>
## MANAGEMENT AREA: 7.1 PERSONNEL DEPARTMENT: ADMINISTRATION

<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>OUTPUT</th>
<th>PARTICIPANTS, LOCATION</th>
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<tbody>
<tr>
<td>7.1.1</td>
<td>RECRUITMENT (Non-teaching staff)</td>
<td>1. Department Staff Requisition</td>
<td>1. Advertise/Internal Posting</td>
<td>Superintendents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1.2</td>
<td>SALARY ADMINISTRATION</td>
<td>Interview Evaluation</td>
<td>Job Description Salary</td>
<td>Evaluation Committee</td>
</tr>
<tr>
<td></td>
<td>- Job Evaluation</td>
<td>Survey Contribution</td>
<td>Classification</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Salary Surveys</td>
<td>Teacher's Documentation:</td>
<td>Survey Output</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Interpretation of Salary</td>
<td></td>
<td>Teacher's Salary</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Schedules</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1.3</td>
<td>EMPLOYEE BENEFITS</td>
<td>1. New Employee</td>
<td>1. Benefits Documentation-</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Insurance Claim, Workmen's</td>
<td>Group Insurance, Pension, OHIP</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Compensation Claim</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Terminating/Retiring Employee</td>
<td>2. Benefit (if acceptable)</td>
<td></td>
</tr>
<tr>
<td>7.1.4</td>
<td>NEGOTIATIONS</td>
<td>1. Contract Termination</td>
<td>3. Necessary Documentation</td>
<td>Salary Committee</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Staff Bargaining</td>
<td>Pension Cheque</td>
<td></td>
</tr>
<tr>
<td>7.1.5</td>
<td>COLLECTIVE AGREEMENTS</td>
<td>Grievance</td>
<td>Grievance Hearing</td>
<td></td>
</tr>
<tr>
<td>7.1.6</td>
<td>TRAINING AND DEVELOPMENT</td>
<td>Need and Selection of Candidates</td>
<td>Training Seminar/Course</td>
<td></td>
</tr>
<tr>
<td>7.1.7</td>
<td>COMMUNICATIONS AND COUNSELLING</td>
<td>1. Employee Question</td>
<td>1. Answer</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Change in Legislation or Board Policy</td>
<td>2. Information of Change</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Employee</td>
<td>3. Counselling</td>
<td></td>
</tr>
<tr>
<td>7.1.8</td>
<td>PERSONNEL RECORDS</td>
<td>New Employee, Terminating Employee</td>
<td>Employee Records + Files</td>
<td></td>
</tr>
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</table>
### Overview

**Management Area:** 7.2 Personnel Administration: Allocation

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Board Policy - Generate Global Figures for staffing for elem., sec., voc., schools</td>
<td>- Student enrolment projections: elementary and secondary by school - formula (board policy)</td>
<td>Global figures of staff needs</td>
<td>Staff Allocation Committee</td>
</tr>
<tr>
<td>2</td>
<td>Calculate the distribution of staff for elementary and secondary schools</td>
<td>- global figures of staff needs - secondary school distribution formula - elementary school distribution formula</td>
<td>Distribution of staff by secondary school - Distribution of staff by family for elementary school</td>
<td>Staff Allocation Committee (S.A.C.)</td>
</tr>
<tr>
<td>3</td>
<td>Estimate of staff mobility (Personnel transfers, resignations, retirements)</td>
<td>Requests for transfer - personal - administrative - leave of absence - notices for resignation, termination, retirement - estimates of above - promotion</td>
<td>Placements of transfers - Estimated Staff movements</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>4</td>
<td>Principal determines staff needs</td>
<td>- estimated staff movements - expected enrollments - school - planning department - distribution of staff by secondary school - distribution of staff by family for elementary school</td>
<td>Staff needs</td>
<td>Principals/Field</td>
</tr>
<tr>
<td>5</td>
<td>Hiring</td>
<td>- Ad to newspaper - internal postings - applications</td>
<td>hiring of staff - placement</td>
<td>Principals/Field/CBO</td>
</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
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<td>OUTPUT</td>
<td>PARTICIPANTS/LOCATION</td>
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<td>-------------</td>
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<td>--------</td>
<td>----------------------</td>
</tr>
<tr>
<td>8.1.1</td>
<td>Liaison with Teacher Training Institutions</td>
<td>Practice Teaching Arrangement</td>
<td>Package</td>
<td>Teacher Education Officer</td>
</tr>
<tr>
<td>8.1.2</td>
<td>Board sponsored Ministry of Education courses</td>
<td>Request: Teachers, Principals, Superintendents, Program Dept.</td>
<td>Recognized Ministry course, Teacher Certificate in area of Study</td>
<td>Teachers Program Department, External Expertise, Ministry of Education, P.D. Council</td>
</tr>
<tr>
<td>8.1.3</td>
<td>Credit and Non-Credit Board Courses: (a) New Teachers</td>
<td>Request: Supt., Curriculum Dept., Policies</td>
<td>Orientation package and evening workshops, available resources, Inservice curriculum, Support services</td>
<td>Coordinator, Consultants, Teacher Education Officer</td>
</tr>
<tr>
<td></td>
<td>(b) Department Heads</td>
<td>Identify, list of materials, refresh, roles in assessing, Need documentation, Identify coordinates</td>
<td>Program plan, written</td>
<td>Teacher Education Officer, Existing Heads, Former Heads</td>
</tr>
<tr>
<td></td>
<td>(c) Leadership Development</td>
<td>Recognition of need, Development of System of Identification, Identification Form, Role Identification Form, Leadership Identification Inventory, Assessment of Leadership Candidates</td>
<td>Staff Forums, Leadership Development Seminar, Role Development Programs</td>
<td>Teachers 104, Super Academic, Board</td>
</tr>
<tr>
<td></td>
<td>8.2</td>
<td>Recognition of need</td>
<td>Leadership Development Seminar, Role Development Programs, Leadership Identification Inventory, Assessment of Leadership Candidates</td>
<td>Teachers 104, Super Academic, Board</td>
</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
<td>INPUT</td>
<td>OUTPUT</td>
<td>PARTICIPANTS/LOCATION</td>
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<tr>
<td>---------</td>
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<td>---------------------</td>
</tr>
<tr>
<td>8.1.1</td>
<td>d) Substitute Teachers</td>
<td>Advertisement of Positions Signing of Contract Issuance of Temporary I.D. Card</td>
<td>In-service Programs Permanent I.D. Card</td>
<td>Teacher Education Officer Supt. of Schools (Program)</td>
</tr>
<tr>
<td>8.1.1</td>
<td>e) Parent Volunteers</td>
<td>Parent In-service Principal In-service Teacher In-service</td>
<td>Guidelines</td>
<td>Volunteers in schools Committee</td>
</tr>
<tr>
<td>8.1.2</td>
<td>In-service and Workshops</td>
<td>Request of school(s) new program Professional Activities</td>
<td>Workshops Related Materials Ongoing Assistance</td>
<td>Supt. (Program) Coordinators Resource Teachers</td>
</tr>
<tr>
<td>8.1.3 &amp; 8.1.4</td>
<td>Development of Local Program (Supplemental of Study Committees)</td>
<td>Request of: Teacher(s) Grade Division School Family</td>
<td>In-service Materials</td>
<td>Program Dept. Teachers outside Expertise</td>
</tr>
<tr>
<td>3.1.7</td>
<td>Liaison with Community Industry</td>
<td>Meeting with school, commercial and industrial representatives</td>
<td>Work experience Programs</td>
<td>Individual School Technical &amp; Comm. Directors Businessmen P.D. Council</td>
</tr>
<tr>
<td>8.1.8</td>
<td>Liaison with Teachers' Federations</td>
<td>Requests from Members of P.A. Council</td>
<td>Coordination of Professional Activity Days on Regional Basis</td>
<td>P.D. Council O.S.S.T.F Education Assn. Sheridan College Liaison Committee</td>
</tr>
<tr>
<td>8.1.9</td>
<td>Professional Activity Days</td>
<td>Board Teacher Federation Program Department</td>
<td>Professional Activities</td>
<td></td>
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</table>
### MANAGEMENT AREA:  8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS

<table>
<thead>
<tr>
<th>STEP NO.</th>
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<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
</table>
| E.2.1 | Board Policies and Regulations | Policies and Regulations | Dissemination of information to all staff | Staff of:  
- Board Offices  
- Schools  
- Maintenance Areas  
- Personnel Dept.  
- Learning Centres |
| E.2.2 | Appointment of Administrative and Supervisory Personnel | Operating Procedures 4, 5, 11 | | Trustees  
Supervisory Officers  
Principals  
Search Committee  
Interview Committee |
| E.2.3 | Appointment of Principals, V.P., Coordinators, Consultants and Related Positions | | | Candidate  
Interview Committee  
Director  
Board |
| E.2.4 | Courses, Conventions, Seminars for Staff | | | All Staff |
| E.2.5 | Leaves of Absence | | | Supt. of Academic Affairs  
Educational Improvement Committee  
Supt. Academic Affairs  
Board |

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| (i) Educational Improvement  
(ii) Exchange or Loan  
(iii) Maternity | Policy  
Application Form | |
|-----------------|-----------------|--------|
| p. 12 | O.P. 8 | Leave, Exchange, Loan or Refusal  
- Need for Replacement |
| p. 14 | O.P. 8 | |
| p. 8 | O.P. 8 | |

(cont'd)
<table>
<thead>
<tr>
<th>STEF NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
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</thead>
<tbody>
<tr>
<td>8.2.6</td>
<td>Twenty-Five Year Club</td>
<td>Study of Service Recognition p. 39</td>
<td>Annual Budget</td>
<td>Trustees Supervisory Officers 25 Year Club Members</td>
</tr>
<tr>
<td>8.2.7</td>
<td>Staff</td>
<td>p. 34</td>
<td>-Approval or Rejection of Leave</td>
<td>Teacher Employee Board</td>
</tr>
<tr>
<td>(i)</td>
<td>Campaigning for Public Office</td>
<td>p. 34</td>
<td>-Terms of Reappointment -Procedure to fill vacancy</td>
<td>Supervisory Officers Board</td>
</tr>
<tr>
<td>(ii)</td>
<td>Election to Public Office</td>
<td></td>
<td></td>
<td>Retiree Board</td>
</tr>
<tr>
<td>8.2.8</td>
<td>Conflict of Interest</td>
<td>Education Act Policy 8</td>
<td>Resolution</td>
<td>Admin. Services Personnel Dept. Board</td>
</tr>
<tr>
<td>8.2.9</td>
<td>Retirement Allowance Age</td>
<td>Policy 29 O.P. 19 Policy 28</td>
<td>Retirement Board Approval Replacement Need</td>
<td></td>
</tr>
<tr>
<td>8.2.10</td>
<td>Payment of Employees in event of Death</td>
<td>Policy 25 Death of Employee</td>
<td>Payment to Estate</td>
<td></td>
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<tr>
<td>8.2.11</td>
<td>General Absence</td>
<td>p. 22, O.P. 8</td>
<td>Leave Granted</td>
<td>Employee Doctor</td>
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<td>8.2.11.1</td>
<td>Sick Leave (Admin. &amp; Non-teaching)</td>
<td>p. 32</td>
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<td>8.2.11.2</td>
<td>Holiday Allowance</td>
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<td>Temporary Appointments to positions of Greater Responsibility</td>
<td>p. 36, Reg. 1 &amp; 2</td>
<td>Appointment</td>
<td>Candidate Supervisor Board</td>
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<td>8.2.11.4</td>
<td>Student to Staff Ratio</td>
<td>p. 35</td>
<td>Ratio Established</td>
<td>Committee Board</td>
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<td>8.2.11.5</td>
<td>Financial Assistance to Teachers on Exchange Serving in Peel Schools</td>
<td>p. 17</td>
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<td>Candidate Board</td>
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<td>8.2.11.6</td>
<td>Maternity Leave</td>
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<td>Leave</td>
<td>Teacher Supervisor Principal</td>
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<td>8.3.1.4</td>
<td>(d) Supernumerary Teachers</td>
<td>Staff 3</td>
<td>Report of Principal &lt;br&gt;- to Teacher&lt;br&gt;- to School&lt;br&gt;- to Field Office&lt;br&gt;Administrative Transfer</td>
<td>Principal&lt;br&gt;Supt. (Family)</td>
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<td></td>
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<td></td>
<td>Evaluation by Principal</td>
<td>Principal</td>
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<td></td>
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<td></td>
<td>Approval as Supply Teacher</td>
<td>Supt. of Program&lt;br&gt;Teacher Education Officer</td>
</tr>
<tr>
<td>8.3.1.5</td>
<td>(e) Supply Teachers</td>
<td>Staff 4</td>
<td>Report of Principal &lt;br&gt;- to Vice-Principal&lt;br&gt;- to School Office&lt;br&gt;- to Field Office&lt;br&gt;Promotion&lt;br&gt;Demotion&lt;br&gt;Transfer&lt;br&gt;Dismissal&lt;br&gt;Professional Development&lt;br&gt;Involvement in Leadership&lt;br&gt;Review Program&lt;br&gt;Triennial Review</td>
<td>Principal&lt;br&gt;Supt. (Family)&lt;br&gt;Prin./Supt./Board&lt;br&gt;Prin./Supt./Board&lt;br&gt;Supt.&lt;br&gt;Prin./Supt./Board&lt;br&gt;Supt. (Family)&lt;br&gt;Supt. (Program)&lt;br&gt;Leadership Review Personnel&lt;br&gt;Supt. (Academic Affairs)&lt;br&gt;Supt. (Family)&lt;br&gt;Supt. of Schools</td>
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<tr>
<td>8.3.3</td>
<td>Evaluation of Principals</td>
<td>Procedures for Evaluating Principals</td>
<td>Team Evaluation</td>
<td>Supt. (Academic Affairs)</td>
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<td>Supt. (Family)</td>
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<tr>
<td>8.3.4</td>
<td>Evaluation of Superintendents</td>
<td>Draft Document</td>
<td></td>
<td>(two)</td>
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<tr>
<td>8.3.5</td>
<td>Evaluation of Lay Assistants</td>
<td>Job Description of Role for each individual position</td>
<td>Informal Evaluation</td>
<td>Trustees</td>
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<td>8.3.6</td>
<td>Evaluation of Resource Personnel</td>
<td>Performance in conducting inservice, workshops, seminars</td>
<td>Informal Evaluation</td>
<td>Director</td>
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<td>Supt.</td>
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<td>8.3.7</td>
<td>Evaluation of Volunteers in Schools (unpaid)</td>
<td>Role established by Principal</td>
<td>Informal Supervision</td>
<td>Principal</td>
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<td>Supervisors</td>
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<td>Principal</td>
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<td>Supt. (Program)</td>
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<tr>
<td>9.1.1</td>
<td>Assessment of related programs</td>
<td>Existing Programs Survey, Existing Curriculum guidelines, Surveys of - Parents, - Teachers, - Supts., - C.D.C., - Federation</td>
<td>Resume of elements of existing programs to be considered in proposed program (CDC Draft Paper)</td>
<td>Staff Committee, Parents, Teachers, Supts., C.D.C., Federation (Chairman CDC), Chief Psychologist</td>
</tr>
<tr>
<td></td>
<td>Approval of Objectives</td>
<td>Recommended State of Objectives (2)</td>
<td>Approved Statement of Objectives</td>
<td></td>
</tr>
<tr>
<td>9.1.2</td>
<td>Design of Draft Core Program</td>
<td>Approved Objectives (3), Available Program Material, Internal Resources, External Resources</td>
<td>Draft Program (Core), Draft Curriculum Guidelines</td>
<td>Curriculum Committee, Curriculum Asst. Coordinator, External Personnel, - Ministry, - OISE, - Boards, Supt. of Sch. Pro...</td>
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<tr>
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<tr>
<td>9.1.4</td>
<td>Approval of Program</td>
<td>Interim Curriculum Guidelines</td>
<td>Approved Guidelines</td>
<td>C.D.C. Admin. Council Program Committee Board</td>
</tr>
<tr>
<td>9.1.5</td>
<td>Dissemination of Program</td>
<td>Budget Supplies In-Service Seminars, Workshops Approved Guidelines</td>
<td>Program (Core) Implementation</td>
<td>Curriculum Asst. Resource Teachers Teachers Supt. of School (Program)</td>
</tr>
<tr>
<td>9.1.6</td>
<td>Implementation</td>
<td>Curriculum Guidelines In-service seminars</td>
<td>In-service Strategies</td>
<td>Supt. of Schools (Family) Principal Teachers</td>
</tr>
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</tr>
</tbody>
</table>
|         | Ongoing Evaluation of Program | Questionnaires  
  - Parents  
  - Teachers  
  Standardized test results | Evaluation Reports | Teachers  
  Principals  
  Resource Teachers  
  Research Officer |
|         | Periodic revision of Program | Curriculum Guidelines  
  Evaluation Reports | Plans for continuation or revision (1) or in-service | Staff Committee  
  C.D.C.  
  Admin. Council  
  -perhaps receiving report to program committee |
<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
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<th>PARTICIPANTS/LOCATION</th>
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<tbody>
<tr>
<td>10.1.1</td>
<td>Identification of student need by concerned parent/teacher/other</td>
<td>Parent/teacher, Attendance or psychological, Outside source - medical/neighbour/relative</td>
<td>Referral by principal</td>
<td>Field</td>
</tr>
<tr>
<td>10.1.2</td>
<td>Assessment of Student</td>
<td>Psychological Services, Attendance Services, Special Education, External Agency</td>
<td>Statement of the students' condition and needs, Initiate pupil accounting process, i.e. reports sent to - principal - field--file to psychologist - CBK file</td>
<td>Field</td>
</tr>
<tr>
<td>10.1.3</td>
<td>Decision on course of Action</td>
<td>Parent, Principal/Teacher, Psych/Attend/Special Education</td>
<td>Need for placement in a particular special education program</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>10.1.4</td>
<td>Placement</td>
<td>Discussion with parent/parent concern</td>
<td>Placement in appropriate program at earliest possible time, Waiting list established in priority order</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>10.1.5</td>
<td>Program Planning (Physical)</td>
<td>Program Demand, e.g. number of students by program need, waiting lists, Staff/facilities/material budget demands</td>
<td>(a) Development of program, in: - school; e.g., special education teacher, aids, suggestions to teachers - family of schools; e.g. perceptual handicapped - multiunit</td>
<td>Field</td>
</tr>
<tr>
<td>STEP NO.</td>
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<tr>
<td>10.1.5</td>
<td>Program Planning (Physical)</td>
<td></td>
<td>(b) Development of Program in: - region; e.g., hard of hearing - out of region; e.g., crippled - other agencies, e.g., Thistletown, Thinks</td>
<td>CBO/Coordinator of Special Ed.</td>
</tr>
<tr>
<td>10.1.6</td>
<td>On-going Evaluation of Students in Special Education (repeat steps 2 to 6 as necessary)</td>
<td>Student Progress Students Program</td>
<td>File of Student Evaluation</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>10.1.7</td>
<td>Monitoring of student Progress once out of Special Education program</td>
<td>Student Progress Liaison with Boards, Agencies, Prof. Groups</td>
<td>Sustaining Change of Placement</td>
<td>CBO</td>
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<tr>
<td>10.1.8</td>
<td>Staff: - Recruitment (local/field) - Placement (local/field)</td>
<td>Staff Needs</td>
<td>Staff Hiring Placement of Staff</td>
<td>Local/CBO</td>
</tr>
<tr>
<td>10.1.9</td>
<td>Professional Development</td>
<td>Special Ed. staff, principal Superintendents, C.B.O. needs Need as seen by school, region, multiunits</td>
<td>Presentation of Program - courses, workshops, visits, etc.</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>10.1.10</td>
<td>Budget</td>
<td>Cost for sustaining current operation New Programs</td>
<td>Budget Estimates Budget Implementation</td>
<td>Field/CBO</td>
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<tr>
<td>10.1.11</td>
<td>Curriculum Development</td>
<td>Input from steps 5 and 6 Student Needs Teacher Needs</td>
<td>Program definition - objectives - course outline - evaluation</td>
<td>Field/CBO</td>
</tr>
<tr>
<td>10.1.13</td>
<td>Community Resources - Liaison with external groups, e.g., other boards, agencies, professional groups, etc.</td>
<td>Student Assessments and Needs</td>
<td>Use of Community Resources e.g. - assessment - kids in external program - program support</td>
<td>Field/CBO</td>
</tr>
<tr>
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</tbody>
</table>
| 10.2.1  | Casework Counselling | Existing Casefiles (for recurring referrals)  
Specialist Assessments  
- psychiatric  
- medical  
Principal/Teacher formal & informal inputs  
Family Environment  
Community Agencies, other Boards | New or updated casefiles  
Assessment of student & family situation  
Recommended course of action  
Student progress monitoring records | Field/CBO  
CBO  
Field |
| 10.2.2  | Liaison with Home, School and Community Agencies | Daily Reports  
Response to Pre-court Hearing  
Certificate of Attendance | Court warning letter  
Summons papers  
Court disposition | CBO/Parents/School  
Field |
| 10.2.3  | Early School Leaving Program | Special needs, problems of referred students | Referrals by agencies, hospitals, clinics, other boards of education | CBO/Field Office & Community Agencies |
| 10.2.4  | Reporting and Budgeting | E.S.L. Application & Proposed program  
School Personnel Assessments | Approval/disapproval of application | Secretary E.S.L.  
CBO |
| 10.2.5  | Special Research Studies | Case Files  
Statistical & Record Book Report  
New legislation, policies, programs, etc. | A.C.s' monthly caseload review  
Statistical & record book report  
Annual report to Board  
Estimated Consequences  
Recommended changes in Attendance Counselling Services & procedures | Field  
Field  
Field  
CBO |
### Step 1: Identification of students within each school who require special consideration by the local school staff

**Description:**
- Identification of students within each school who require special consideration by the local school staff.

**Input:**
- Internal school records for previous years
- Current teacher assessments and/or standardized tests
- Expression of parental concern
- Reports from community personnel or agencies - especially medical, counselling
- Professional Development workshops relating to child development, learning problems, etc., from psych. staff and/or other sources
- Student

**Output:**
- Appropriate class placement by principal
- Appropriate programming & management by teacher
- Counselling by staff

**Participants/Location:**
- Principal, assisted by teachers and counsellors at each school

### Step 2: Identification of students within each school who require services of resources beyond the local school

**Description:**
- Identification of students within each school who require services of resources beyond the local school.

**Input:**
- As above
- Criteria for each of the services for referral

**Output:**
- Referral to appropriate consultative service:
  - Attendance, Special Education, Psychology and/or
- Referral to appropriate community service:
  - Public health, Youth Bureau, etc.

**Participants/Location:**
- Principal, assisted by teachers and counsellors at each school

### Step 3: Referral of appropriate students to Psychology Department

**Description:**
- Referral of appropriate students to Psychology Department.

**Input:**
- Directions from Psychology Dept. re information to be supplied by principal (standard form)

**Output:**
- Written referral forwarded to the office of the Chief Psychologist at CBO, either directly or through the Field Office

**Participants/Location:**
- Principal at each school
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<tr>
<th>STEP NO.</th>
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<tbody>
<tr>
<td>4</td>
<td>Entry of the student's name into the CBO index of special students or notion of prior contact with any Special Service and information available</td>
<td>CBO index of files in FO for special students</td>
<td>CBO index of special students</td>
<td>Clerical asst. at Central Board Office of the Chief Psychologist</td>
</tr>
<tr>
<td>5</td>
<td>Psycho-educational assessment of needs</td>
<td>Written data as supplied by school with referral Reports of: - prior assessments - Interview with student - Student's performance on any test administered - Interview with parents, or other individuals with relevant data - Chief Psychologist or other Psych. staff, or professional literature</td>
<td>Consultation with teacher and/or principal regarding conclusions of psycho-educational assessment</td>
<td>Psychology Dept. Staff in Field Office</td>
</tr>
<tr>
<td>6</td>
<td>Decision regarding appropriate psycho-educational recommendations to be made for remediation and amelioration</td>
<td>Assessment information (see above) - Chief Psychologist; other Psych. staff; professional literature; other Board consultants - Directory of Community Services - Consultation with principal, teacher, etc. to explore probable alternatives</td>
<td>Written report to principal summarizing conclusions of assessment &amp; recommendations made. Copy of report to OSR and student's file identified by CBO index. Consultation with parents and verbal report given of assessment and recommendations</td>
<td>Psychology Dept. Staff in Field Office</td>
</tr>
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<tr>
<td>7</td>
<td>Implementation of recommendations which have been made</td>
<td></td>
<td>As identified in the above recommendations, e.g. (a) placement in special education program (b) remediation in regular class (c) counselling (d) referral to community agency—providing and receiving reports to/from community agencies (e) home management</td>
<td>Principal, teacher and/or parent</td>
</tr>
<tr>
<td>8</td>
<td>Checkback or evaluation of recommendations</td>
<td></td>
<td>Revision of recommendations where necessary</td>
<td></td>
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- Parents
- Attendance counsellor
- Psych. staff at Field Office
### Overview

**Management Area:** 10.3 Special Services (c) Psychology Dept.

#### 10.3.2 Psychology, "One-With-One" Volunteer Program

<table>
<thead>
<tr>
<th>STEP NO.</th>
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<tbody>
<tr>
<td>1</td>
<td>Search for initial identification and screening of potential volunteers. Explanation of program and general procedures</td>
<td>Appropriate program outline and procedures</td>
<td>Referral of appropriate individuals to Board's Project Director (Office of Chief Psychologist)</td>
<td>Community Coordinator 3 Public Groups</td>
</tr>
<tr>
<td>2</td>
<td>Final selection of volunteers and listing</td>
<td>Referral of appropriate individuals to Board's Program Director (Office of Chief Psychologist)</td>
<td>List of Volunteers - available or assigned</td>
<td>CBO Program Director</td>
</tr>
<tr>
<td>3</td>
<td>Identification of students requiring volunteer service</td>
<td>Assessment Data (i.e., 1-7 C) Program Outline Previous Annual Report</td>
<td>Student's recommended for &quot;One-With-One&quot; Volunteer Program</td>
<td>F.O. Psychology Staff</td>
</tr>
<tr>
<td>4</td>
<td>Recommendation to Principal of student for volunteer</td>
<td>Student's recommended for &quot;One-With-One&quot; Volunteer Program</td>
<td>Approval or non-approval</td>
<td>Principal</td>
</tr>
<tr>
<td>5</td>
<td>Consideration of Recommendation</td>
<td>Teacher Viewpoint Program Outline</td>
<td>Request for appropriate volunteer</td>
<td>F.O. Psychology Staff</td>
</tr>
<tr>
<td>6</td>
<td>Request for appropriate volunteer by F.O. Psychology Staff</td>
<td>Principal approval</td>
<td>Assignment of student to appropriate volunteer</td>
<td>CBO</td>
</tr>
<tr>
<td>7</td>
<td>Matching of student with appropriate volunteer and assignment of volunteer to F.O. Psychology Staff member</td>
<td>Catalogue of Volunteers Student Assessment Data from F.O. Psychology Staff</td>
<td>Assignment of student to F.O. Psychology member</td>
<td>CBO Program Director</td>
</tr>
</tbody>
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<tr>
<td>8</td>
<td>Explanation to parent of volunteer service and gaining consent for student's participation</td>
<td></td>
<td></td>
<td>F.O. Psychology Staff and School principal</td>
</tr>
<tr>
<td>9</td>
<td>&quot;Program Planning&quot; for the student</td>
<td>Teacher and Principal suggestions Materials, ideas from Psychology staff and Library at CBO</td>
<td>Monthly progress sheet (format doc.) Earlier report</td>
<td>F.O. Psychology Staff and Volunteer</td>
</tr>
<tr>
<td>10</td>
<td>2.3 sessions (weekly) of volunteer with the student to carry out planning program</td>
<td>Monthly progress sheet (format doc.) Earlier report</td>
<td>Additional information Changes in approach when necessary</td>
<td>Volunteer and Student</td>
</tr>
<tr>
<td>11</td>
<td>Consultation with/or Supervision of the Volunteer</td>
<td></td>
<td></td>
<td>Community Coordinators</td>
</tr>
<tr>
<td>12</td>
<td>Monthly in-service program of skill development for volunteers</td>
<td>Volunteers Coordinators &amp; Program Director Outside Resources Personnel</td>
<td>Memorandum to Program Director re: volunteer should continue in program due to various causes n.b.: memorandum always is written to an individual child</td>
<td>F.O. Psychology Staff</td>
</tr>
<tr>
<td>13</td>
<td>Year end review of progress of each student with volunteer and decision regarding continuation or phasing out of program</td>
<td>Teacher, principal, volunteer</td>
<td>Annual Report (Formal)</td>
<td>Program Director and Community Coordinators</td>
</tr>
<tr>
<td>14</td>
<td>Year end evaluation of program and assessment of needs for new year</td>
<td>Psychology Staff Volunteers</td>
<td></td>
<td>Program Director and Community Coordinators</td>
</tr>
</tbody>
</table>
### MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT
10.3.3 Psychology Department Administration

<table>
<thead>
<tr>
<th>STEP NO.</th>
<th>DESCRIPTION</th>
<th>INPUT</th>
<th>OUTPUT</th>
<th>PARTICIPANTS/LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determination of role and job descriptions for staff</td>
<td>From teachers, principals of schools From F.O. Psychology Staff</td>
<td>Job descriptions</td>
<td>CBO/Supt. of Special Services Chief Psychologist F.O. - Supt.</td>
</tr>
<tr>
<td>2</td>
<td>Determination of need for staff (i.e., number of staff)</td>
<td>Principals F.O. Psychology Staff Chief Psychologist</td>
<td>Staff needs included in F.O. Budget</td>
<td>F.O. Supt.</td>
</tr>
<tr>
<td>3</td>
<td>Approval for hiring of additional staff or determination of staff: student ratio</td>
<td>Staff needs included in F.O. Budget - Supt. and CBO and Special Services - Chief Psychologist, consultation Specific data re work load in each F.O. (Back up data)</td>
<td>Board approval</td>
<td>Board</td>
</tr>
<tr>
<td>4</td>
<td>Hiring of Staff</td>
<td>Board approval Staff needs Interviews</td>
<td>Staff Hired</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Assignment of staff to F.O.</td>
<td>Chief Psychologist Consultation F.O. Psychology Staff</td>
<td>Staff deployment</td>
<td>F.O. Supt.</td>
</tr>
<tr>
<td>6</td>
<td>Deployment of staff within F.O.</td>
<td>F.O. Staff Consultations Committee on Professional Development Evaluations of Staff</td>
<td>Professional Development Program, set of topics for all staff Individual concession and supervision with chief Psychologist</td>
<td>Chief Psychologist</td>
</tr>
<tr>
<td>7</td>
<td>Consultation with staff and professional development of skills</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Cont'd.*
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Integration of Psychology Staff with other Board Consultatives Services in Special Services and other</td>
<td>Principals, Chief Psychologist</td>
<td>Evaluations (Formal)</td>
<td>P.O. Supt.</td>
</tr>
<tr>
<td>9</td>
<td>Supervision and evaluation of Psychology Staff</td>
<td></td>
<td></td>
<td>P.O. Supt.</td>
</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
<td>INPUT</td>
<td>OUTPUT</td>
<td>PARTICIPANTS/ LOCATION</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------------------</td>
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<td>------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Dissemination of information regarding range of service available</td>
<td></td>
<td></td>
<td>All Psychology Staff</td>
</tr>
<tr>
<td>2</td>
<td>Identification of need for service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Provision of Service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STEP NO.</td>
<td>DESCRIPTION</td>
<td>INPUT</td>
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</tr>
<tr>
<td>---------</td>
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<td>-----------------------</td>
</tr>
<tr>
<td>11.1.1</td>
<td>Selection of Administrative staff</td>
<td>G-memo to all Staff, Applications from Staff, Results of initial screening by field superintendents</td>
<td>Selected Staff</td>
<td>Principal of Continuing School</td>
</tr>
<tr>
<td>11.1.2</td>
<td>Brochure: Preparation, space allocations, and scheduling</td>
<td>Last year’s brochure, Miscellaneous information, e.g. letters, Comparison of other jurisdictions for good ideas</td>
<td>Book of course offerings, Space allocation</td>
<td>Coordinator of Continuing School</td>
</tr>
<tr>
<td>11.1.3</td>
<td>Tentative Staff Selection</td>
<td>G-memo to all teaching staff, Applications received, Screenings by night directors</td>
<td>Tentative Selection of Staff</td>
<td>Night (Field) Directors</td>
</tr>
<tr>
<td>11.1.4</td>
<td>Registration of students and allocation of students to classes</td>
<td>Student applications</td>
<td>What courses are economically viable and academically necessary, Final staffing, Refunds and information to applicants of unavailable courses</td>
<td>Continuing Ed. Staff, Supervised by the Night Directors</td>
</tr>
<tr>
<td>11.1.5</td>
<td>Monitoring: of student attendance and academic progress, budget control, course evaluations</td>
<td>Attendance figures, Student records</td>
<td>Remedial actions, Current student records</td>
<td>Night Directors, Head Office</td>
</tr>
<tr>
<td>11.1.6</td>
<td>Overall evaluation of adult program and Report to Board</td>
<td>Results of Program i.e. attendance, written evaluation by students, number of students successfully completed courses, This year’s results</td>
<td>What kind of programs are successful on geographic and program basis</td>
<td>Budget Estimate</td>
</tr>
</tbody>
</table>
### Overview

**Management Area:** 11.2.1 Continuing Education - Summer School (Senior)

#### Step No. Description

1. **Choose locations of summer schools, esp. credit and 7 & 8 remedial**
   - **Input:** Schools
     - accessibility
     - size
     - resources
     - air conditioning
     - competing usage
     - previous summer school usage
   - **Output:** Selected schools
     - 3 in North and
     - 3 in South
   - **Participants/Location:** Principal of Continuing School

2. **Selection of Administrative Staff**
   - **Input:** G-memos to staff for Directors and subject chairman
   - **Output:** Selected staff for north and south
     - 1 Director
     - 2 Assistant Directors
     - English, Math & Science subject chairman
   - **Participants/Location:** Principal of Continuing School

3. **Planning, advertising, Promoting summer school**
   - **Input:** Evaluations of previous year's operations
     - Suggestions from interested groups (Supts., Trustees, etc.)
     - Estimated student demand for summer school
   - **Output:** Circular advertising program, to all students
     - Tentative estimates of resources required, e.g., teachers
   - **Participants/Location:** Principal of Continuing School plus Administrators

4. **Tentative Staff Selection**
   - **Input:** G-memo to all teaching staff
   - **Output:** Ranking of teachers by subject
     - Interim letters of appointment to likely teachers
   - **Participants/Location:** 240

5. **Student Registration and class scheduling**
   - **Input:** Student Applications
     - Prescriptive diagnostics (7 & 8 remedial)
   - **Output:** Economically viable and academically necessary courses
   - **Participants/Location:** Mainly Directors

Cont'd.
### Overview

**Management Area:** 11.2.1 Continuing Education - Summer School (Senior)

<table>
<thead>
<tr>
<th>Step No.</th>
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<th>Output</th>
<th>Participants/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Monitoring: Student Attendance and Academic Progress, Budget Control, Course Evaluations</td>
<td>Class attendance registers, Student records</td>
<td>Remedial actions, Student reports</td>
<td>Directors, Subject Chairman, Teachers</td>
</tr>
<tr>
<td>7</td>
<td>Summary and Evaluation of Summer School Program</td>
<td>Attendance records and academic results</td>
<td>Report to the Board, Input to next year's summer school planning</td>
<td>Principal of Continuing School</td>
</tr>
<tr>
<td>8</td>
<td>Budget Estimates for next year</td>
<td>This year's results</td>
<td>Budget Estimate</td>
<td>Principal of continuing School</td>
</tr>
</tbody>
</table>

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APPENDIX C:

FLOWCHARTS OF MAJOR MANAGEMENT AREAS
1.1 BUDGET PREPARATION

Budget Guidelines
- forms
- summary

Prepare Budget Guidelines
- budget format
- expenditures (current year)
- budget (current)

Prepare School Requests
- school request
- "overheads"
- budget guidelines consultation

Prepare Area Requests and Priority Rank
- cap. current
- special
- maintenance

Prepare Area Requests
- requests to departments
- dept. requests
- area requests
- "overheads"
- budget guidelines consultation

Prepare Department Requests and Rank
- dept. requests
- "overheads"
- budget guidelines consultation

Prepare Superintendency Requests and Rank
- superintendency requests
- department requests

Superintendency Requests
- superintendency requests
- department requests
1.1.2.1 BUDGET PREPARATION: School Requests from Field Office

Conditions at individual schools' needs

Prepare description of budget categories: includes upper limit for cap., current and replacements, to which schools should adhere.

Schools prepare cap., current and replacement budget within guidelines and supplemental items — in priority order and major requests (over $300)

Determine % of cap., current (a) allocable (e.g., Instr.) (b) non-allocable (Bldg.)

Principals Meeting to discuss descriptions and procedures and clarify

Requests submitted to Area Supt.

Requests reviewed

Board approved per pupil allowance (policy)
1.1.2.1 (cont'd)

Superintendent

Request for estimate

YES — Non-allocable

Request legitimate?

NO

Send back for revisions

YES

Send back for revisions

Revised requests

Request up to 50% of total — forward to Budget Control and Purchasing

Budget Finalisation

Budget approval

Requests over 50% of budget held by Field Office

Major requests

Final approvals on requisitions

Purchase requisition

Construction dept.

Consider Supplemental Budget requests

Approve Supplemetals up to budget allowance

Requisitions

Estimate of project

4 mths.

Field Supt. approval

To Construction dept. for tendering and job completion

Supt. of plant approval and set priorities

YES

Plant dept. budget (regional)

Planning and Building Committee

Stop

NO
1.1.2.2 BUDGET PREPARATION: School Requests — Operational Budget (Schools)

Board Policy

Per pupil — sum $ allocated directly to school

Principal determines budget within those constraints

Allowed to spend up to 10% money until budget approval

Suggestions or direction from Supt. re spending on program

Per pupil — $ to Field Office

Special requests from schools

Allocation according to needs
1.1.3 BUDGET PREPARATION: Prepare Area Requests

- Prepare description of budget categories
  - Cap. Current
  - Replacement
  - Operational Supplies

Description document

Departments of Field Office

Budget forms (standard)

Complete forms

Requests from depts with priority rank

Supts. receive forms and discuss rationales with dept. personnel
  - Initial establishment of priorities

Requests satisfactory?

NO

YES

Collation into field office budget
  - set priorities

Field office budget

Supt. of Finance
BUDGET CONTROL

1.2

1 of 4

- Budget
- Computer list of accounts
- Prepare computer input - Interest to accountant, insert $ to account no.
- Computer
- Budget Accounts - Edit List
- Check Edit List
- Requisitions from schools
- Receive requisitions and stamp date
- Verify signatures account coding
- Errors?
  - YES: Complete Goof Form
  - NO:
    - 1
    - Goof form
    - Return to school

Date stamped requisitions

250
1.2 (cont'd)

1

Blanket requisitions or stores order?

\( \text{YES} \)

\( \text{NO} \)

Requisition approved

Approved requisition

Purchase order

Purchasing dept.

Buyer

Purchase order signed by buyer

Budget control - Accounting copy of purchase order removed

Date stamped and verified

Coding
  1. Type of transportation
  2. Batch number

Batch ticket

2 251

C-8
2. Purchase Orders

3. Blanket Requisition

4. Calculate batch total

5. Batch ticket completed

6. Computer batch processing of daily purchase orders

7. Stores orders?

8. YES

9. A

10. Print-out with Total

11. Computer generated stores order

12. Errors print out

13. Stockroom fills and delivers order

14. Any difference in total $ on print Out and batch total?

15. YES

16. Check by budget control and correct error

17. NO

18. B

19. NO

20. 252

21. Check by budget control and correct error
1.2 (cont'd)

Computer processing: Requisitions checked against totals in accounts

Current Accounts Files

5

Edit and Update and Rejects report

Current Accounts Files (updated)

6

Rejects ?

Not OK

Budget control decision

OK

Force request through

Purchasing dept. handles purchase orders

Purchase order (accounting copy)

Accounts payable file order

Purchase order stamped "Rejected"

Order returned to originator

1/

Purchase order stamped "Rejected"

Order returned to originator

Purchase order (accounting copy)

Accounts payable file order

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1.2.1 BUDGET CONTROL: Monthly Summary

School/Dept budget statement:
1. Budget allocation
2. Outstanding purchase order
3. Actual expenses
4. Available balance
5. Totals

Computer processing

Current Accounts file

Dept. transaction statement (individual entries to each a/c)

Schools and/or depts. of Bd. office (Budget Unit)

Problems?

NO

Stop

YES

Inquiry to budget control

Written enquiry

Problem checked

Valid?

NO

Send response to school

YES

Correct error

Response

File
2.1 ACCOUNTING FUNCTION: Accounts Payable

C

Purchase order

Run purchase order program

Encumbrance control: $ available in budget

YES

Deduct $ estimate from budget

Accounts file

NO

Stop

Goods/Services received

B

Capital Construction project?

YES

Approval by Design and Construction

NO

Process invoices (Accounting department)

Supplier

Invoices

Claimants

Expense claims

Petty cash reports

Misc. cheque request

Input document of invoices

Intermediate payment?

YES

Issue cheque (Manual)

NO

Run cheque issuing program (weekly)

Cards

Account File

Run cheque issuing program (weekly)

Cheque register

Issue remaining cheques
2.2.1 ACCOUNTING FUNCTION: Accounts Receivable and Revenue —
Miscellaneous Revenue and Tuition Fee Revenue

Memo: $ of miscellaneous revenue

Memo: Tuition fee $ — Driver Ed., — Summer School

Memo: Winter course Tuition $

Bank deposit slip prepared, sent to bank with cash and cheques

Bank deposit slip

Summary revenue document prepared

Prepare batch ticket (sums of summary revenue forms)

Computer: Revenue Deposit Routine

Rejects in Edit List

Find error and submit new run

Accounts File

Batch ticket

File Edit list

NO

YES update
2.2.2. ACCOUNTING FUNCTION: Accounts Receivable — Tuition Fees (Day School)

- Report from schools re fee-paying students
- Invoice for tuition prepared
- Invoice sent to parents or other board
- Follow-up procedure
- Invoice paid?
- NO: Invoice paid?
- YES: Invoice paid?
- Yes: Revenue procedure
- Revenue received by accounting department
- Remove paid invoices from unpaid invoice file
- Stop

- No: Unpaid Invoice File
- Billing Journal
- Journal entry prepared from billing totals
- Journal entry processing
- A/Cs File Bank — Accounts Receivable

- Enter invoice in Billing Journal
- Unpaid Invoice File
2.2.2.1 ACCOUNTING FUNCTION: Accounts Receivable – Tuition Fees (Follow-up procedure)

- Unpaid invoice one month past due
  - Send follow-up letter
  - Invoice paid?
    - NO
      - 3 months or more
        - Handle case individually through school or appropriate body
    - YES
      - Follow-up letter

Unpaid Invoice File

2 months NO YES

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2.2.3 ACCOUNTING FUNCTION: Accounts Receivable – Rental billing and Revenue

- Rental permit acquired by area business offices
- Accounting Department
- Rental billing established exactly
- Invoice sent to organization
- Caretaker's Overtime Report

G
ACCOUNTING FUNCTION: Accounts Receivable - Financial Reporting to Ministry

1. Est. enrollment projections
   - elementary
   - secondary
   (Planning Dept.)

2. Preliminary budget estimation
   - elementary
   - secondary

3. Preliminary calculation of
   - grants: elementary, secondary
   - municipal requisitions

4. Estimated enrollment projections
   - elementary
   - secondary

5. Estimated ceiling for current year

6. Administrative Council

7. Board

8. Revised Municipal Requisitions
   - Elementary
   - Secondary

9. Revised Municipal Requisitions
   - Elementary
   - Secondary

10. Revised grant estimates
    - Elementary
    - Secondary

11. Revision of grants and municipal requisitions due to the budget changes

12. Board review of budget and changes to budget

13. Estimate of miscellaneous revenue

14. Estimate of GL grants for current year

15. Ministry grant regulations for current year incl. various parameters

16. Preliminary Municipal data
    - assessment figures
    - payment in lieu of taxes
    - tax write-offs

17. Revised Municipal Requisitions
    - Elementary
    - Secondary

18. Revised grant estimates
    - Elementary
    - Secondary

19. Board approval of budget

   YES

   NO
2.3.1.1 & 2.3.1.2 ACCOUNTING FUNCTION: General Accounting – Daily Borrowing & Journal Entry

Credit advice from bank

Daily borrowing from bank

Summary of bank borrowing (monthly)

Computer input (batch)

Journal entry

Loan Interest

Miscellaneous bank charges

Cancellation of cheques

Total system's cheques

Corrections and adjustments

Payroll Summary

Payroll liabilities

- net pay

- manual payroll cheques

Accounts File update

Computer Processing

Edit lists

(A) Trial balance

General ledger transactions

Computer statements as required

Accounting Department for review
2.3.1.3 ACCOUNTING FUNCTION: General Accounting — General Ledger Account Analysis

Asset & Liability Accounts analyzed by accounting department

Budget statements analyzed by budget units

Error perceived?

Inquiry made to budget office

Check original documents, etc.

Journal entry (Corrections)

Corrections required?

Stop
2.3.1.4 ACCOUNTING FUNCTION: General Accounting — Bank Account Reconciliation

- Bank statement
- Comparison (monthly)
- General ledger (Bank account balance)
- Error? NO → Stop
- Error? YES → Find sources of error
  - Bank or internal error?
    - Bank
    - Internal
      - Make correction → Journal entry → Accounts File
      - Advise bank of error
2.3.2.1 ACCOUNTING FUNCTION: General Accounting – Capital

Planning Department → Site approval (Ministry)

Accounting Dept. applies to OMB for approval → Board resolution for site acquisition

Application to OMB → Board resolution for bank borrowing authority to apply to OMB & to sell debentures to OECAC

Set up capital budget accounts → OMB approval granted

Site purchased

*Report to Ministry

OECAC debenture issued → Apply to OECAC for debenture

Short term financing required? YES

Borrow $ from bank

NO

Debenture report from Ministry

Journal entry – Capital revenue

Accounts File

Start project

Board resolution for site acquisition

1 of 2
2.3.2.1 (cont'd)

Invoice for capital const. project

Accounts payable routine (Manual issue of cheques)

Equipment purchases and miscellaneous contracts

Accounts payable routine - regular purchase order with invoice

School site capital budget statements

School site capital budget transactions

School building and equipment budget statements

School building and equipment budget transactions

Accounts File

Computer processing

Capital Accounts File

update
2.3.2.2 ACCOUNTING FUNCTION: General Accounting — Sales Tax Rebate Routine on Capital Construction

Apply for federal tax rebate on capital construction

Approved

$ Received

Miscellaneous Revenue routine in Accounts Receivable

Applied to specific capital project

Accounts File
2.4.1 ACCOUNTING FUNCTION: Payroll – Phase I – Create Transaction File

Basic input preparation
- forms preparation
- authorization by Personnel Dept

- new hires
- terminations
- transactions e.g. rate change etc.

Payroll Dept.
Clerks prepare General Information forms

Supplementary earnings forms:
- e.g. bi-weekly time sheets
- night school etc.

Key punch operation

Supplementary earning record cards

Absence Report cards

Edit Run (c)

Absence Report File

Supplementary Earnings File

Merge 3 files to create transaction file

Transaction File

Disc change form file
2.4.2 ACCOUNTING FUNCTION: Payroll – Phase II – Master File Update

- A
  - Transaction File
    - Additions
    - Deletions
    - Transacns.

- Old Master File (i.e., staff file)
- New Master File

- File update procedure
- Error printout
  - Items held in abeyance and inputted next pay

B
2.4.3 ACCOUNTING FUNCTION: Payroll — Phase III — Preparation of Paychecks

- **New Master File**
- **Run “Calculation Program”**
- **Flag for “exceptions”**
- **Payroll supervisor checks the situation and gives approval**
- **Signed documents approving the cheques**
- **Edit file book**
- **Staff paychecks Last cheque is hash total**
- **Balanced with old payroll register**
- **Payroll Dept. sorts and delivers cheques**

Note: the cheques still go through
2.4.4 ACCOUNTING FUNCTION: Payroll — Phase IV — Financial Distribution Report

Diagram:

1. Card Image File
2. Financial Distribution run
3. Payroll distribution
4. *Financial system program
   *Refer to General Accounting Procedure

Legend:
- Solid line: Flow of information
- Dotted line: Control or status information

Notes:

- Hofer to General Accounting Procedure

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3.1.1 SUPPLY FUNCTION: Purchasing – General Procedure

Requisition for supplies

Buyer processes requisition

Find source of supply by
- public tendering for > $5000
- quotation for < $5000

Determine where to buy
- quality
- service
- price

Input from tenders

Budget Control

Purchasing dept.: file in active supplier file (form 1.3)

Purchase order

Approval

Purchasing dept. process order

Purchasing dept. file by purchase no. (form 1.4)

Purchase order to supplier (form 1.1)

Form 1.5 for school file

Form 3.2 for school requisition copy

Form 1.6 Receiving copy to be returned when goods received

Requisition filed by school name with purchase no. on requisition form 3.1

To school

Form 1.6 Receiving copy to be returned when goods received
3.1.2 SUPPLY FUNCTION: Purchasing – Blanket Ordering Method for Purchasing

- Purchasing dept. initiates blanket order
- Catalogue prepared and photo copies sent to school and maintenance dept.
- Company catalog
- Blanket order (copy no. 2.4)
- Blanket Order (copy no. 2.5)
- School initiates a blanket order requisition
- Blanket order copies nos. 2.1, 2.2, 2.3
- Budget control – coding check – check orig. budget
- Approval – Copies nos. 2.1, 2.3
- "Active" Supplier File
- Blanket order (copy no. 2.3)
- Purchase dept.
- Blanket order (copy no. 2.1)
- Supplier
3.1.3 SUPPLY FUNCTION: Purchasing – Invoice Processing

- Invoice sent to accounting dept. after goods sent
- Supplier copy file (form no. 2.3 or 1.3)
- Materials delivered to school
- Receiving copy (i.e. form no. 2.4 c. no. 1.6 sent to accounting dept.)
- Accounting Dept. (Accounts Payable)
- Purchasing dept. (i.e. buyer) checks invoice with supplier's copy file
- Duplicate copy of invoice sent to purchasing dept.
- Order okay?
  - YES
    - File by supplier in “dead” supplier file
    - Invoice plus supplier copy file (2.3 or 1.3)
  - NO
    - Contact supplier for correction
    - Invoice plus correction
    - Notify accounting office
3.2.1 SUPPLY FUNCTION: Stores — Purchasing for stockroom (flow into stores)

Storage Order from stockroom for new supplies

Stock status report giving inventory level daily computer output

Travelling Requisition

Purchase dept., either method 3.1.1 or 3.1.2 used to purchase supplies
3.2.2  **SUPPLY FUNCTION: Stores — Requisition of Supplies (flow out of stores)**

Requestor prepares stores order requisition

Coding clerk checks requisition (Budget dept.)

Computer processes requisition and order changed to school (i.e., stores order program)

Stores Order (copy 7.1)

Stores Order (copy 8.1) stockroom copy

Stockroom fills the order

Stores Order (copy 8.2) Delivery copy

Requestor

Stockroom Files
3.3 SUPPLY FUNCTION: Request for Printing Services

Requestor prepares "Printing Requisition form"

Coding clerk checks request (budget dept.)

Printing dept. processes order

Requested Printing & Printing Requisition Form (copy 2)

Requestor

Printing Requisition Form (copies 1, 2)

Printing Requisition Form (copy 1)

Accounting Dept. (for charging to Acct.)
1

Design II Working drawings

Working drawings approved?

YES

Obtain final project approval

Project approved?

YES

Construct school

Occupancy
ACCOMMODATION SUPPLY: Capital Program — Monitor Housing Development/Site Selection

1. Enrollment (projected) registered
2. Available facilities

Facility needs analysis

Current enrollment
Property file
Official plan

Any students?

YES

Projection forecast data

1. Enrollment (projected)
2. Available facilities

Proposed registered sub-div.

YES

Are available facilities adequate?

NO

NEW site required

YES

Building permits issued (from municipalities)

NO

Any students?

Housing yield factors

Draft Sub-Div. plan from Ministry of Housing

NO

YES

ENROLLMENT

2

1
4.1.1 & 4.1.2 (cont'd)

1. Site selection criteria
   2. Optimal school sizes

- Revised draft plan (alt. site)
- Request/specify alternate site

- Site analysis

- Proposed site approved?
  - YES
    - Develop Purchase agreement
  - NO
    - NG

- Standard purchase agreement

- Purchase agreement

- Comment of draft plan
  - School site(s)
  - Board approval
  - Purchase agreement

- Property file

- Ministry of Housing
- Separate School Board
- Local & Regional Planning Offices

- Site purchase
- Capital program

2 of 2
4.1.2.1 ACCOMMODATION SUPPLY: Capital Program — Site Purchase

Property File (site purchase agreement)

Approved Capital Allocation (site, $ allocation)

Project proposal

Prepare site purchase resolution
1. Site cost
2. Loan req'd.
3. Debenture req'd

Board approval

1. Site Purchase Resolution
2. Site Purchase agreement

Instructions to lawyer (request for $)

Prepare site purchase resolution

Commission site appraisal

Site Purchase Resolution

Site Purchase Instructions to lawyer (request for $)

Property file

Prepare grant application

Prepare OMB application

OMB approval

S/P resolution

COT

Prepare application OCAC

OCAC approval

1. Debenture
2. Debenture by-law

Enactment of debenture by-law (by board)

Issue of debentured capital (by OCAC)

SIP resolution

Prepare OMB application

Arrange temporary financing

Site purchase agreement

Approve G.L. grant ($ amt.)

Ministry approval

Municipal assessment confirmation

Purchase site

Construction
ACCOMMODATION SUPPLY: Capital Program - Establish capital program

- Consultation with trustees
- Community municipal, provincial trends/submissions (non-formal)
- Property file (site purchase $)
- Current enrollment
- Monthly enrollment (sep. board)
  1. New gr. 9's
  2. Pub.-Sep. transfers

(FEB.-MAR.)

- Facilities Needs Analysis (Feb. - June)
- Space Needs (type, size, mix)
  1. New schools incl. sites
  2. Additions
  3. Portables
  4. Major renovations
- Space needs, costs (priority-ranked)
- Property file (Available sites)
- Major renovations (from cap-current)
- Separate action on:
  1. Boundary change
  2. School closure
  3. New & pm. requirement
- Report to Ministry (5 yr. Capital Space Forecast)

(JULY & SEPT.)

- Estimate costs
  Establish priorities (space needs, costs)
- 1. Grant guidelines
  2. F/E formula
  S/sq. ft. $/pup-place
- 1. Updated enrollments
  2. Updated projections
- Approved architects
- Prepare interim alloc. program (planning & bldg. committee)

(AUG.)

- Board approval
  Interim Allocation

Space needs
Interim Allocation

1. Grant guidelines
2. F/E formula
S/sq. ft. $/pup-place

Current enrollment
Monthly enrollment (sep. board)
1. New gr. 9's
2. Pub.-Sep. transfers

Facilities Needs Analysis
(Jan. - June)

Space Needs
(type, size, mix)
1. New schools incl. sites
2. Additions
3. Portables
4. Major renovations

Property file (Available sites)

Major renovations (from cap-current)

Separate action on:
1. Boundary change
2. School closure
3. New & pm. requirement

Report to Ministry (5 yr. Capital Space Forecast)

JULY & SEPT.

- Estimate costs
  Establish priorities (space needs, costs)
- 1. Grant guidelines
  2. F/E formula
  S/sq. ft. $/pup-place
- 1. Updated enrollments
  2. Updated projections
- Approved architects
- Prepare interim alloc. program (planning & bldg. committee)

(AUG.)

- Board approval
  Interim Allocation

Space needs
Interim Allocation

1. Grant guidelines
2. F/E formula
S/sq. ft. $/pup-place
4.12 (con'd)

Board approves changes

Prepare capital program

Prepare project briefs (family supt.)

Capital Program submission

General specifications: Educational

(OCT.)

Prepare project briefs (family supt.)

(OCT.-DEC.)

Project Proposal Process

Capital Program

(FEB.-MAR.)

Ministry approval

Approved Building Allocation $ &

Approve site Allocation $ &

Purchase site
4.1.4 ACCOMMODATION SUPPLY: Capital Program — Project Proposal Process

Needs analysis

1. Current enrollment
2. Projections

Population age distribution (from municipal)

Prepare co-op needs study

1. Capital program
2. Project brief

Prepare building proposal — Utilities req’d
Site detail

Prepare project proposal

Commission site survey

General instructions to architects

Establish site development requirements

Instruct architect

Ministry approval
1. need
2. bldg. & cost

OTA approval (financing)

Information to Architects

Final Approval

Design 1: Sketch Plans

Construction

1. Confirmation of commission
2. General Instructions
3. Project brief
4. Site detail
5. Cost guide
6. Req’d date of occupancy
7. Project Supervisor
4.1.5 ACCOMMODATION SUPPLY: Capital Program – Design I (Sketch Plans)

- Proposed Eng./arch. consultants (from arch.)
- Board (D & C) approval?
  - YES
- Consultation Board staff
- Co-op needs study
- Current enrolments
- Update needs justification
- P & B approval?
  - YES
  - P & B approval of sketch plans?
    - Approved
    - YES
- Prepare sketch plans
- Capital grants plan
- Reference costs: Construction
- Standards: Building Construction, Health, etc. (from arch.)
- Notification of project proposal
- Consultation: Parks & Rec. Library
- Other Agencies
- Fire Marshal approval?
  - NO
  - Recommendations, Approvals
  - Required revisions
- Prepare Ministry Submission
- 1. Sketch Plans
  - 2. Needs Justification
  - 3. Cost Estimate
- Ministry Approval?
  - Working Drawings

- ONR
  - Health
  - Environment
  - Municipal
  - Others
4.1.6  ACCOMMODATION SUPPLY: Capital Program — Design II (Working Drawings)

- Approved sketch plans
- Fire Marshall's revisions
- Other agencies recommendations
- Other agencies
- Approval
- Recommendations
- Prepare working drawings and specifications
- Approval of Fire Marshall
- NO
- YES
- Required revisions
- Current enrolments
- Co-op needs study
- Update needs justification
- Board presentation
- Board approval?
- YES
- Prepare Ministry submission
- Ministry approval?
- YES
- Final approval
4.1.7 ACCOMMODATION SUPPLY: Capital Program – Final Project Approval

Co-op needs study

Current enrolments

Update needs justification

Call tenders

Analyse bids, recommend contractor

Board approval?

Prepare Ministry Submission

Final Ministry project appvl.

Prepare OMB submission

OMB approval?

Award contract

Construction

Notify architect: $ approved

F & E (from principal)

Order F & E

Instalation
5.2.1 PLANT MAINTENANCE: Project Request

Flowchart:
- Breakdown notification
  1. Subdivide to
  2. Transfere
  3. Assign
- Program
  Mtce.
- Cap/Current (Cent
  Program
  Mtce.)
- Repair/Alteration
  request
  (Principal)
- Work order
  1. Draw
  2. Far

- Construction
  and equipment
  cost
  schedule
- Solicit design
  from Super

- Eng. ins.
  request

- Draft
  installation
  instruction
  Est.

- Project file

1. Project No.
2. School
3. Date rec'd/est.
4. Project description
5. Originator

Project status
Board display

Project file
5.2.2 PLAN MAINTENANCE: Project Investigation

- Project File Update
  - 8. Investigator
  - 9. Schedule
  - 10. Cost est.

- Reinvest, reestimate Eng. Staff

- Future plan for bldg. site
  1. D & C
  2. Planning

- Cap-Curr. (Cent.) Budget item

- Construction and equipment from schedule

- Reinvest investigator requirements to ENG staff

- Project File Update
  - 12. Proj. Schedule

- Future
  - I, II, III, IV projects

- Approve
  - Type I projects over $500

- Disposition End

- To

- Project File

2:J
5.2.3 PLANT MAINTENANCE: Project Authorization

C

Project file

Project File

Request for authorization (Eng. Supt.)

Cap. Curr. (Cent.) Budget Memo

Cut

Disposition (Originator)

Approved

Budget

Notification to engineer

Project File Update: Authorize & Action No.

Project File

D

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5.2.4 PLANT MAINTENANCE: Design, Contract

- Standard Specs. Details
- Detailed Invest., Prepare Drawings, Specs. (Eng. Staff)
  - Invite quotations or tender (Eng. Supt.)
    - Tender Info. sheet
    - Tender
    - Tender spread sheet
    - Project File Update: 13. Tenders/Quots. rec'd.
  - Contract or board forces?
    - Select contractor (Engineering Supt.)
    - Within budget
      - Disposition (originator)
      - Approval
      - Project File update: 11. Revised Authorization cost
      - Project file
      - Award contract
    - Over budget
      - Request authorization for extra
      - Board Forces
      - Cost vs. budget
      - Tenders
      - Open tenders prepare spread sheet (Purch. Dept.)
      - Tender spread sheet
      - Project file
      - Project File update: 11. Revised Authorization cost
      - Project file
      - Award contract

- Design Required?
  - YES
    - Reactivate Project (Plan, & Ops. mgt.)
    - Project Status Board re display
  - NO

1. Critical conditions
2. Tender No.
5.2.5 PLANT MAINTENANCE: Project Sciente

Establish P.O. (Purchasing dept.)

Requisition (to purchasing)

Establish P.O. (Purchasing dept.)

Notify contractor, Schedule work (Eng. supt.)

Notify school, fam. supt. (Eng. Supt.)

Assign project task (Eng. supt.)

Project File Update:
15 Proj. supt.
16 Schedule
17 P.O. No.

F

Project
5.2.3 PLANT MAINTENANCE: Carry Out Work

- Required extras contractor
- Approve extras (proj. supr.)
- Request authorization for extras
- Authorize extras (Originator)
- Carry out work:
  - [Contractor]
  - Board forces
- Inspect progress
  - Approve progress payment (proj. supervisor)
- Forward progress payments
  - (Accts. pay. dept.)
- Progress invoices
- Project File Update:
  - 20. Authorization of extras
  - 21. Holdback release
  - 22. Close P.F.
- Project File
- Final invoice
- Final inspection (Eng. staff)
- Deficiencies
  - Correct deficiencies (Contractor)
  - Notification of deficiencies
- Satisfactory
- Signed off purchase order
- Forward final payment
  - (Accts. pay. dept.)

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6.1.1, 6.1.2 & 6.1.3 TRANSPORTATION: Regular — Route Design and Contract Negotiations

- Board Minutes (Boundaries)
- Boundary Changes
- Map school boundaries
- Current boundaries map

- Updated map

- Establish 2 mi. limit for each school

- Compile list of streets eligible for transportation (by school)
- For each school list of streets eligible for transportation

- Board Minutes (Transportation Policy)
- Policy changes

- Board Minutes
  - List of schools with Home Ec. & Ind. Arts facilities

- List of bus operators
  - Previous year's conditions of tendering and forms

- Prepare request for Home Ec. & Industrial Arts Schedule
- School transportation policies, forms instructions to schools

- Request for Home Ec. & Ind. Arts Sept. schedule
  - 1. No. of classes
  - 2. Schools involved

- Prepare invitation to tender for bus contracts
- Conditions of tendering and application forms

- Advertise to bus operators (early Nov.)
6.1.3 6.1.2, 6.1.3 & 6.1.4 (cont'd)

Adjust accounting on contracts

Contracts finalised

(ENDING OF SEPT.)

Bus operators

Final contracts

(ENDING OF SEPT.)

Adjust accounting on contracts

Projected transportation expenditures (last year)

Inform superintendent of business

Project next year's budget requirements

Estimate of percentage increase in operation prices

Large difference?

Inform superintendent of business

Budget request for next year

Total expenditures estimated and compared with projected

(MID OCT.)

(MID OCT.)

Supt. of business

Budget dept.

Total expenditures estimated and compared with projected

(SUP. OF BUS.)

6.1.3 6.1.2, 6.1.3 & 6.1.4 (cont'd)
6.2 TRANSPORTATION: Special Students

Special service resource personnel

Special class student forms: name, address, birthdate, home school

Current master routes (regular), route maps, etc.

Operator contracts

Design new routes, or adjust regular routes (rural)

Draw up drivers' schedules and student lists

Write to all special students with transportation information

Cross off list

Adjustments to special student list because of referrals, moves, etc (constant changes in allocation)

Enquiries

Updates

Special Services

(MID APRIL)

Request special student info. from Special Services

(JULY)

Plot all special students

Current map

List each Special student's name, address school

Drivers

(MID AUG.)

Write to all special students with transportation information

Special students' and transportation instructions (letter). - route, timing, operator, bus no, tel, nos.

Principals

Copy

Parents

Changes in address, deceased, moved, etc.

Bus Operators

Parents

Principals

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6.3 TRANSPORTATION: Kindergarten Busing

(APRIL)

Elem. school principals

Kindergarten registrations -- names, addresses (or map), shift

Plot morning shift kindergarten students with regular

Map(s) of plotted students (regular)

Regular route design (including morning kindergarten students)

Design take-home routes (morning) and afternoon collection and take-home routes

Compile kindergarten student lists (or map) for drivers

To each driver: names, addresses (or map) of kindergarten students on route

Bus operators

Morning take-home and afternoon shift schedules
TRANSPORTATION: Winter Bus Scheduling

1. Establish a 1-2 ml. limit for each school
2. Compile a list of streets eligible for winter bus transportation
3. Plot students on road map
4. Design additional routes or make modifications to regular routes
5. Designate new routes and timing - No. of buses req'd - No. of taxis
6. Inform contractors and allocate bus privilege cards to schools
7. Adjust accounting on contracts

Current map with boundaries

Master routes or bus maps

Current bus contracts awarded

Bus and taxi operators

Winter bus routes, timing instructions

Inform contractors and allocate bus privilege cards to schools

List of streets eligible for winter bus transportation

School lists or maps - names, addresses of eligible students

Each school (K-3)

School principals (K-8)

New routes and timing

Winter bus routes

Bus privilege cards
TRANSPORTATION: Home Economics and Industrial Arts

- Principals in home school or facility school
- Home Ec. & Ind. Arts program schedule (APRIL)
- Operator's tenders (Home Ec. & Ind. Arts)
- Allocate Home Ec. and Ind. Arts runs to operators (lowest bids)
- Home Ec. & Ind. Arts bus routes and timing
- Contract negotiations
6.6 TRANSPORTATION: Ministry Reports

School principals

ME 301 Principals report on transportation of pupils

Check and correct ME 301's

ME 301's (corrected)

Summarise ME 301's on ME 302

ME 302 Board transportation summary

Ministry of Education
7.1.1 PERSONNEL ADMINISTRATION: Non-Teaching Staff Recruitment

1. Unit with vacancy or new position
   - Requisition for staff form
   - Job Description Manual
   - Salary schedule (non-teaching staff)

2. Internal Applicants
   - Letters of application of internal applicants
   - Personnel record of applicant

3. Personnel File
   - Recent unsuccessful external applicants for job position
   - Skills Inventory File

4. Internal job posting

5. Process Request
   - check validity of claim
   - compile job position
   - post position internally (5 days)

6. Any eligible internal applicants?
   - YES
     - Establish competition file for job position
   - NO
     - Internal job posting

7. Competition file for job position
   - Preliminary (screening) interview

8. Assessments of eligible applicants
   - Any suitable?
     - YES
       - Forward application to hiring unit for interviews
     - NO
       - Any eligible external candidate on file?
         - YES
           - Interviewed yet?
             - YES
             - NO
           - NO
         - NO

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7.1.1 (cont'd)

External applicants for position

Investigate other sources of personnel e.g. Agency

Process applications and add to competition file

Compile and place job advertisement for external dissemination

Job Advertisement

Local news media etc.

External Application Forms

Compile and place job advertisement for external dissemination

Job Advertisement

External applicants for position

Additional comments:

NO

NO

Any chosen by hiring unit?

Any suitable?

Forward application to hiring unit

Compile personnel record and file

Inform successful applicant

Persons' Record

Letter of Confirmation

Inform successful applicant
7.1.2.1 PERSONNEL ADMINISTRATION: Salary Administration – Job Evaluation

Superintendent or employee

Request for change in classification for employee

Assess request for change in classification

Point rating plan

Job description manual

Old job description

Job evaluation

New job description

Job rating and level setting

New salary level
7.1.2.2 PERSONNEL ADMINISTRATION: Salary Administration — Salary Surveys

Request for salary information → Analyse salary data → Salary survey
7.1.2.3 PERSONNEL ADMINISTRATION: Salary Administration – Interpretation of Salary Schedules

Elementary school teachers → Individual teachers' documentation of qualifications → Judgment and research as to appropriate category → Category and experience level → Make salary adjustments if necessary (or starting salary) → Personnel File → Updated Personnel Record Payroll record → Payroll File
7.1.3.1  PERSONNEL DEPARTMENT: Employee Benefits – New Employees

Employee details and options requested → Determination of benefits → Benefit Entitlements and authorization to pay → Payroll
7.1.3.3 PERSONNEL ADMINISTRATION: Employee Benefits — Terminating/Retiring Employee

- Forward employee details to retirement fund
- Calculation of lump sum payment (Retirement allowance)
- Notification of retirement allowance

Accounting department
7.1.4 PERSONNEL ADMINISTRATION: Negotiations

Current agreement

Insurance companies and/or consultants

Implications of proposed new benefits

Supporting negotiating team

Settlements in other boards

Comparative salary data

Projected costs of proposed settlements

Payroll

Draw up interim offers and cost them

Interim offer and costs implied

Settlement reached?

NO

YES

Board negotiating team

Draw up final agreement

Collective agreement
7.1.5 PERSONNEL ADMINISTRATION: Collective Agreement Violations

1. Schedule B
   - nature of grievance
   - remedy sought
   - paragraphs violated

2. Check that grievance claimed is a violation

3. Monitor grievance procedure and provide info. to parties involved

4. Is Arbitration required?

5. Make arrangements for a board of arbitration
7.1.8 PERSONNEL ADMINISTRATION: Personnel Records

- Teachers
  - Teacher Personnel Info., held per teacher
  - Corrected and updated info. and documentation of additional qualifications
  - Certificate Submission form (salary query)

(NEW)
- Determine changes in individual personnel records
- Notification of category change
- Payroll file

- Personnel updates additional documentation
- Abstract and transform to machine readable form
- Individual personnel back up file
- Personnel data bank
7.2 PERSONNEL ADMINISTRATION: Allocation

- Planning department
  - Enrollment projections (by school)
  - Generate enrollment projections
    - Global staffing requirements (by family of schools)
      - Elementary
      - Secondary
      - Vocational

- Area superintendent
  - Elementary school staff distribution (for each family of schools)
    - Generate staff distribution for elementary (for family of schools)

- Secondary school principal
  - Secondary school staff distribution (by school)
    - Generate staff distribution for secondary (by school)

- Teaching staff collective agreement

- Board
  - Pupil/staff formulae (Board policy)
    - Elementary school distribution formula
    - Secondary school distribution formula

(JAN. 31st)

(MID FEB.)

2
Teaching Staff

Requests for transfer

(End of Feb.)

Requests for leave of absence

(May 31st)

Notice of resignation, termination, re-appointment, promotion

Estimated staffing requirements (by school & discipline)

Determine administrative transfers and/or hiring needed to meet staffing requirements

Staffing surplus and/or shortages by school and discipline

Placement of administrative transfers

Placement of voluntary transfers

Change of position form

Receiving Superintendent

Personnel Dept.

Position(s) unfilled?

YES

NO

A

Teaching staff

Internal posting

Post position internally

Position(s) unfilled?

NO

YES

A

3
7.2 (cont'd)

- Advertise position externally (C.B.O.)
- Teaching vacancy advertisement - school - subjects
- Newspapers etc.

Teaching staff hiring process:
- Principal, Fam. Supt., Personnel Dept.
- External Applications
- External Applicants for Teaching Positions
- Letter of Confirmation (where applicable)

Personnel File:
- Personnel Record or Update

Payroll File:
- Payroll File Update form
8.1 STAFF DEVELOPMENT AND RELATIONS — Staff Development

1. Identification of needs
   - Statement of needs

2. Analysis of existing staff development programs
   - Resume of existing programs

3. Identification of objectives
   - Establishment of priorities
   - Development of specific program(s)
   - Approved program
   - Process of board approval for programs
   - Recommended program
   - Implementation of individual staff development programs
8.1.1 STAFF DEVELOPMENT AND RELATIONS: DEVELOPMENT — Liaison with Teacher Training Institutions

Communication with teacher training institutions each spring

Letters
Telephone calls
Personal visits
Call backs

Information re student teacher applications

Determination of number of students to be placed in Peel schools

Communication to board from teacher training institutions

Information from schools re recommendation for student teachers

Determination of the number of schools to be involved

Submission of school names to teacher training institutions

Delegation of operation re practice teaching to local schools

Submission of names of practice teachers to payroll from schools

Cheques to practice teachers
8.1.2 STAFF DEVELOPMENT: Board Sponsored Ministry Courses

- Board approval re: Ministry courses
- Establishment of need for specific board sponsored Ministry courses
- Preliminary list of courses being contemplated for sponsoring
- Liaison with other local school boards
- Survey of families of schools
- General indication of interest from schools
- List of courses other local boards are considering
- Selection of courses to be offered (tentative)
- Survey of teachers for indication of interest in specific courses
- Confirmation that course will not be sponsored
- Decision to sponsor course
- Letters and notices to teachers, schools other boards
- Confirmation that course will be sponsored
- List of proposed courses to be offered
- Selection of Principal
- Selection of Vice-Principal
- Recommendation - Supt. Prog. - Coord.
- Leadership identification file
8.1.2 (cont'd)

Design of application form

Application form, fees form, course information

Establishment of accounting and payroll procedures

Selection of course staff: Briefing staff

Recommendation of Princip., V.P., Resource teacher

Collection and preparation of briefs for Ministry

Content time table, Tentative staff list

Commencement of course

Records deposits to principal

Advertisement of courses

Processing of applications and deposits

Conclusion of course

Evaluation of course

Evaluation by
  - principal
  - staff
  - students
  - Ministry

Financial statement

Operation of course

Conclusion of course

Evaluation by
  - principal
  - staff
  - students
  - Ministry

Content time table, Tentative staff list

Collection and preparation of briefs for Ministry

Selection of course staff: Briefing staff

Establishment of accounting and payroll procedures

Application form, fees form, course information

Design of application form
8.1.3.1  STAFF DEVELOPMENT: Credit and Non Credit Courses – New Teachers

- Request of supt. program that families develop orientation program
- Development of orientation courses by each family for new teachers
- Operation of evening courses per family of schools
- Orientation kit re. board family
- Information re: core curriculum resources, support services
- Information re: family, community, etc.
8.1.3.3 STAFF DEVELOPMENT: Credit and Non-credit Courses — Leadership Development

Recommendation of Board Staff Federation Others

Recognition of need for leadership training
- future leader
- existing leader

Identification form by principal, Supt., Coord. . . Self evaluation form

Development of a system of identification of personnel capable of more responsibility

Outline of inservice activities

Establishment of leadership identification inventory

Selection of people to perform roles re exercising leadership

Notice of candidate involvement, proficiency, etc.

Notice of candidate involvement, proficiency, etc.

Operation of leadership development seminars

Operation of leadership development seminars

Evaluation of candidates in leadership situations and programs

Assessment of candidates leadership potential

Completed identification and self evaluation forms

Staff forums re development
- lectures
- discussions
- panels

Operate role development programs

Utilisation of assessment for placement, promotion
8.1.3.4 STAFF DEVELOPMENT: Credit and Non-credit Courses — Substitute Teachers

Signing of contract by substitute teacher

Provision of seminar program by curriculum department

Attendance at seminars (equiv. 2 days)

Volunteer days in schools

Decision

Three evenings of winter course

Decision

Issue of 5-year permanent I.D. card

Salary increment

Withholding of permanent I.D. card

Programs Sept. and Oct. March and April

Decision

YES

YES

NO

NO
8.1.3.5  STAFF DEVELOPMENT: Credit and Non-credit Courses – Parent Volunteers

Suggestion of principal, teachers, librarian

Suggestion of parents, community

Other sources – board...

Identification of need for a parent volunteer program (P.V.P.)

Program not established

Decision of staff to establish P.V.P.

YES

Implementation of P.V.P. at school

NO

Parent volunteer advanced course GPV200

Provision for development of parent volunteer

Guidelines of handbook 'Volunteers in schools' Peel 1975

Practical experience as a parent volunteer
STAFF DEVELOPMENT: Professional Activity Days

Board approval re: no. of days for professional development (P.D.)

Development of P.D. packages for professional activity days

Development of P.D. workshop form re requests

Dissemination of P.D. forms to schools

Request Forms

Completed request forms

Receipt of forms from schools by dept. curriculum

Development of P.D. workshop schedule

P.D. workshops

Operation of P.D. workshops

Evaluation reports by teachers, principals, supt.

Evaluation of P.D. workshops

P.D. packages of coordinators, consultants, etc.
8.2.3 STAFF RELATIONS: Appointment of Principals, Vice-Principals, etc.

- Board approval of new position
- Identification of available position
- Position vacancy
- Advertisement of position within board and possibly across Ontario
- Applications
- Receipt of applications by superintendent of schools concerned
- Interview with applicants not recommended by Superintendent of school
- Written explanation for non-recommendation
- Policy 21 Regulation 2, O.P. Staff 4
- Approved applications forwarded to Superintendent Academic Affairs
- Establishment of Interview Committee
- Interview of approved candidates
- Policy 21 Regulation 5, 6
- Submission of recommendation of interview committee to supt. of academic affairs
- Policy 21 Regulation 5, 6
- Board approval on appointment
- Hiring or promotion of candidates

Policy 21 Regulation 4
Policy 21 Regulation 5, 6
Policy 21 Regulation 7
9.0  SCHOOL CURRICULUM (PROGRAM)

Parental Input  Board Input  Staff Input  Principal, Teacher Input  Community, Ministry and others  Evaluation of Existing Programs

Identification of Program Need  Specified needs

Recommended Revision  Program Proposal  Report of Superintendent Program  Planning data  Budget data

C.D.C. Review

Revision?  Superintendent's Review

Approval  YES

Administrative Council Review

YES

1
9.0 (cont'd)

1. Approval?
   - YES: Program Committee Review
   - NO: Board Review

2. Approval?
   - YES: Establishment of Study Committee
   - NO: Board Rejection of Proposal

3. Revision
   - YES: Board Rejection of Proposal
   - NO: Establishment of Study Committee

B - NO

C - NO
Development of Objectives

C.D.C. Review

Revision?

YES

NO

Existing programs and guidelines

Resumé of Relevant Program Material

Assessment of Related Programs

Adoption of Objectives

Statement of Approved Objectives

Design of Draft Core Program

Draft core program of curriculum assistant, committee writing team

Evaluation Criteria

Selection of Evaluation Methods

Draft core program of curriculum assistant, committee writing team

D
9.0 (cont’d)

- Recommendation to Terminate Program
  - On-Going Evaluation of Program
    - Recommended Major Revisions
    - Recommended Minor Revisions
    - Continuation of Program
  - Cyclic Revision of Program
    - Decision?
      - Revision of Program
        - Termination of Program
          - A
          - C
9.1.1 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation

- Development of Objectives

1. Related literature
2. External expertise

Stated Board philosophy

Establishment of study committee

Draft of proposed objectives

Report of superintendent program

Ministry of Education objectives

Recommended revisions, additions, deletions

Review of draft proposed objectives

Reaction of schools, teachers, divisions, supt.

Draft of proposed objectives

Stated Board philosophy

Revision of proposed objectives

YES

Review of draft proposed objectives

NO

Submission of proposed objectives to C.D.C.

YES

Revision?

NO

YES

Revision?

NO

Statement of approved objectives

Adoption of approved objectives

Final
SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation

Design of Draft Core Program

1. Existing programs guidelines

2. Resume of relevant program material

3. Assessment of related programs (research)

4. Determination of specific needs

5. Establishment of guidelines expectations and procedures for curriculum assistant and writing team

6. Recommendation of superintendent (program)

7. Appointment of curriculum assistant (if required)

8. Selection of writing team

9. Program proposal approved by Board

10. Writing of program

11. Ministry of Education objectives

12. Statement of approved objectives

13. Recommendation of: supt. (program) curr. assistant principal supt. (fam.)

14. Statement of approved objectives

15. Establishment of study committee

16. B

17. C-91

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SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation

- Evaluation of Program

1 of 2

Design of draft core program

Draft core program - guidelines - objectives

Establishment of expectations

Statement report of expectations re: evaluation

Selection of evaluation criteria

Questionnaire results - parents, teacher prin., v.p., consultants

Selected standardized student tests

Selection of random sample of students by grade, age, etc.

Attitude survey - teachers - principals - community - students - parents

Administration of selected tests to random sample(s)

Results of applicable previously administered tests

Analysis of test results current and past

List of student tests
Implementation of core program

Cross-sectional survey of same grade cohort until longitudinal study finished

Standardized and board tests

Analysis of test results

Longitudinal survey of same random sample on an annual basis to end of Gr. B

Test results

Information surveys:
- community
- staff
- students

Analysis of test results

Report and recommendations
Preparation of timetable schedules at Ministry of Education

Decision to process at board

Yes

Existing Ministry of Education time tabling process

Program developed by G.E.A.C.

No

Development of computer program for time table scheduling

Staff recommendations

Development of forms re: student courses teachers

Student scheduling Teacher/Course Master

Dissemination of forms to the schools

Receipt of completed forms

Preparation of Form Information for Computer Input

Registration of students

Tally of number of students requesting each subtest

Cross-referencing of subjects (Conflict Matrix)

Calculation of teachers required for assignment

Calculation of teachers required for assignment
From schools:
- availability of
  - physical plant
- staff allocation

---
Master Timetable Tape

Production of the master timetable

Simulation load on master timetable

Simulation of load of students on each section

Identification of no loads

Counselling of individual students

Changes in requests

Simulation process repeated as necessary

Decision re satisfaction

Acceptance of master timetable

Printouts for field offices:
- list of teachers
- subject taught
- location
- time

Printouts for schools by opening day:
- timetables: teacher
  - room, student
  - class lists
  - teacher info. sheet
9.2.2  SCHOOL CURRICULUM (PROGRAM): Operations – Grade Reporting

- Master timetable tape

- Transformation from timetabling to grade report system

- Shut down of the scheduling system

- Information transfer scheduling to reporting

- Establishment of the grade report system

- Updating process re:
  - transfers
  - admissions
  - retirement

- Updated class lists submitted to schools

- Grades and comments written by teacher by mark or code

- Processing of:
  - marks
  - comments
  - attendance

- Class lists

- Student mark summary for office binder

- Ox lists, medical lists, mailing labels

- honour list, failure list to dept. heads

- Established comment document

- Check lists, section statistics

- Dec, Mar, June
  - Report card to student:
    - office
    - counselling

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10.1.1 SPECIAL STUDENT SERVICES: Identification of Student Need

a) INTERNAL

- Parent contacts school
  - Principal parent, teacher discuss the situation
    - Solution?
      - YES: Solved within the school
      - NO: To coordinator sp. ed. dept. at C.B.D.

- Resource teacher, prim. assist., and sp. ed. R.T. (maybe) discuss situation
- Contact parents

- Resource teacher or prim. assist. identify student need
  - Discussion with principal
    - Inform teacher

- Teacher identifies student need

- Teacher identifies student need
  - Resource teacher or prim. assist., identify student need
    - Inform teacher

- Parental consent form

B1 B2 B3
10.1.1.2 SPECIAL STUDENT SERVICES: Identification of Student Need

b) EXTERNAL

Parent/doctor etc., contacts community agency re: child's need

Community agency asks school for information

- Classroom information
- Chief psychologist

Data on assessment of child's situation

Community agency assessment

Parental permission to release info.

YES

Parental release form

Agency contacts school/principal

Inform chief psychologist (CBO)

Remains with agency

NO

D

Need for assessment?

YES

C

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10.1.2.1 SPECIAL STUDENT SERVICES: Assessment of Student

a) Internal

- Referral by principal to either B1 or B2 or B3

  B2

  Referral form to attendance counsellor

  Referral to the Attendance counsellor at C.B.D.

  B1

  Referral form to chief psychologist at C.B.O.

  Referral to the chief psychologist at C.B.O.

  To field office for assignment (assoc. psych.)

  To assistant, etc., for action

  Report
  - case history
  - personal data
  - etc.

  C

  B1

  Principal decision

  B2

  Sp. ed. R.T. works with teacher to assist student

  D
10.1.2.2 SPECIAL STUDENT SERVICES: Assessment of Student
(b. External

Referral to external agency

Agency assesses the situation and makes recommendations

Recommendations

Referred to

B1

B2

B3
10.1.3 SPECIAL STUDENT SERVICES: Decision on Course of Action

1. Psychology staff's assessment and recommendations (field office)

2. Confer with attendance counsellor or sp. ed R.T. if necessary

3. Talk with principal and teacher

4. Interview with parents

5. External agency?
   - YES: B4
   - NO: Parental consent?
     - NO: Course of action?
       - YES: C3
       - NO: Card: remains in P.O. psych. placement file (file no. 3)

   - Card: to sp. ed. research teacher (file no. 1)

   - Card: to C8O (file no. 2)
Attendance Action as required

Course of action?

Psychologist works with teacher

Sp. ed. mainstream work with teacher to set up a program

Waiting list of kids to be considered (maintained by Sp. Ed., R.T.)

Special program
Confer with sp. ed., R.T. re: admission to special program

Multi-unit admission board committee re: placement of student

Recommended placement

Receiving principal's comments

Character of program

Community report or involvement

Psychological Report
- Recommendations from External Agency

10.1.3 (cont'd)

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10.1.4 SPECIAL STUDENT SERVICES: Placement

Res. teacher contacts home principal re: recommendations

Recommendation for placement?

YES

RES. teacher informs home school principal

NO

Principal must inform parents of recommendations of admission board

Action by school (either E1 or E2)

Priority list established by admission board

YES

Priority list

NO

Room in program?

YES

R.T. informs local principal standing in priority list

R.T. assists school during waiting period

NO

Request for transfer

Approval for transportation (Transportation officer)

1

Application for admission

Parental consent?

YES

Parent signs consent form

NO

RES. teacher records name for future reference

Action as designated by C2 or C3

E1 program based on
- psych. rep. rec.
- R.T. assistance
- CBO involvement

E2: emotional behaviour
- ext. recommendation
- psych.
- CBO
- family doctor

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10.1.4 (cont'd)

1

Parent wishes to visit school?

YES

Parent visits school

NO

Problem resolved?

YES

Res. teacher and receiving principal decide on time of move

NO

Student moves to new program

Card from file no. 2

Card filed in sp. ed. student file

Parent doesn't like school: discussion with co-ord., R.T.s, principal, parent etc.
10.1.5.1 SPECIAL STUDENT SERVICES: Program Planning

a) Program Demand

- Waiting list no. 1 i.e. kids to be considered
- Waiting list no. 2: kids to be placed in spec. ed. program but no room
- Documents no. 7 & no. 10
  - Special needs
  - External agencies
  - Coordinator input

- Justification for new program based on student needs & guidelines set by board (coordinator)

- Coordinator and source teachers

- New program proposal sent to supt. of schools of family

- New program sent to supt. of schools for spec. ed. for approval

- Supt. of academic affairs approval

- New special ed. program

- Supt. of schools of family

- Input to staff allocation formula
SPECIAL STUDENT SERVICES: Program Planning

b) Staff/Facilities/Materials/Budget Demand

- New programs
  - Determination of locations for new programs (supt. of schools - family & F.O. staff)
    - Locations for new programs
  - New staff requirements
    - Interviewing and hiring of the required new staff (supt. of schools - family, principal, res. teachers)
      - List of newly hired staff
    - Staff, principals, res. teacher determine and order materials
      - Materials ordered
    - Budget demand i.e. new program allowance
      - Budget allowances requested
  - Final approved list of kids requiring placement in Sp. Ed. Programs
    - Students placed in sp. ed. programs (see E3)
      - Budget Officer
SPECIAL STUDENT SERVICES: On-going Evaluation

Informal:
- OSR cards
- information from previous teacher

(SEPT.)
Teacher reviews formal and informal information

Formal:
- WRAT tests from previous spring
- other tests
- psych files

Student program

Teacher sets objectives, teaching strategies, materials all leading to a balanced program

During the year teacher monitors program and makes modification if necessary

Concurrently an informal evaluation process starts: teacher, parent, principal, external agency

Teacher's responsibility to know where student is, where he should be, how to get him there

Spec. Ed. statistical and program analysis: (objectives)

Wide Range Achievement Test Form

FALL

Spec. Ed. R.T. distributes the tests

WRAT test results (spring)

CBO: WRAT tests initiated in spelling, reading and arithmetic

CBO: Formal evaluation of kids using WRAT

Analysis of the program, tests & retests, on hand info. to see what's happening

1

3
Teacher discusses WRAT results with principal and Sp. ed. R.T.

Spec. Ed. R.T. confers with co-ordinator

Coordinator confers with supt. of school special services

Coordinator and Spec. Ed. R.T. confer with supt. of schools family

Program recommendation for student
- progress of student
- appropriateness of the program
- indication that student has learned from a skill base

Information recorded & transferred to a "data bank" at 'CBO'

Student file

Information recorded & transferred to a "data bank" at 'CBO'

Coordinator and Spec. Ed. R.T. confer with supt. of schools family

Alternative outcomes

Regular classroom i.e. demission

Remain in special education program

Placement in alternative special education

Placement in alternative special education
10.1.6.1 SPECIAL STUDENT SERVICES: On-going Evaluation
A1 – Remain in Special Education Program

Information from Student Files at C.B.O.
- psych files
- Sp. Ed. files

Res. teacher, teacher psychologist, principal, coord. discussion recommend that student remain in sp. ed. program

Spec. Ed. Placement committee discusses the case

Committee agrees with recommendation?
- YES
- NO

Case is sent back to the school for review

Resolution?
- YES
- NO

Placement committee and school resolve the problem

Teacher talks with parents re student remaining in sp. ed. program

Parents agree with recommendation?
- YES
- NO

Interview to review academic, intellectual and rationale for parents' request (co-ord., parents)

Student returns to mainstream or alternate support situation

Parents still disagree?
- YES
- NO

Student remains in spec. ed. program
10.1.6.2 SPECIAL STUDENT SERVICES: On-going Evaluation

A2 - Alternative Special Education Program

Doc. no. a
Information from "Student Files"
- C.B.O.
- Psych. Files
- Special Ed. files

Doc. no. b
Recommendation to place student in alt. spec. ed. program

A2

A1

Decision

A3

Res. tr., princ., teach. discuss situation and come to agreement (i.e. alt. A1, A2 or A3 (usually go along with adm. bds. recommdns.)

Committee makes alt. recommendation (sp. ed. placement board)

Committee agrees with recommendation?

YES

Talks with parents (teacher)

NO

A2D

ELEM.

Elem. or sec. case?

YES

Parental consent?

NO

A3

Parents sign admission form

Parental interview (co-ordinator, sp. ed., admission board)

Parents accept?

NO

Parents change mind and agree to place student in alt. spec. ed. program

Conclusion

Student goes to mainstream

YES

NO

Parents accept?
10.1.6.1 (cont'd)

- Vocational school
  Admission board reviews case
  (N.B. 1 of 3 admission boards
  - Britannia
  - South Peel
  - W.J. Fenton)

- GLD or SLD+ program?
  - GLD
  - SLD

- Admission boards recommendations
  - Recommended placement accepted
  - Defer placement according to priority (i.e., student remains where he is)

- Parents agree with placement?
  - YES
    - Student placed in SLD Program
  - NO
    - Student remains in mainstream with no special programming

*GLD — General Learning Disability
SLD — Special Learning Disability
10.1.6.3 SPECIAL STUDENT SERVICES: On-going Evaluation
A3 – Regular Mainstream

Doc "b" recommendation that student be placed in regular mainstream

Teacher, principal, res. teach., psych., meet and agree to recommend student remain in regular mainstream

Spec. ed. placement committee discusses the recommendation

Committee accepts the recommendation?

Case is sent back to the school for review

Placement committee and school resolve the problem

Resolution?

Recommendation is discussed by home school teacher and res. teacher

YES

NO

YES

NO
10.1.6.3 (cont’d)

Placement committee meets again to discuss principal concern

Home school principal agrees with the recommendation?

Principal approves?

YES

Evaluation of student’s academic background and recommend grade (res. tr., sp. ed. R.T., psych.)

Committee may talk with supt. of schools family for flexible boundaries

NO

YES

Match teacher characteristics e.g. male/female; old/young, etc. – teacher must agree

Committee may talk with supt. of schools family for flexible boundaries

NO

YES

Supt. of schools family agrees

Present principal and teacher talk with the parents

YES

Parents agree with new placement?

Parents visit the new school and talk with the new principal and teacher

YES

Parents accept new school?

YES

Student enters follow-up program

NO

NO

Student is placed in the new school

NO

NO

Student enters follow-up program

YES

Form to be filled out

YES

YES

A3
SPECIAL STUDENT SERVICES: Monitoring of Student's Progress after Leaving Special Education Program

1. Sp. ed. R.T. discusses red & yellow kids with the coord. & formulates strategy on how to handle them.

2. Child put in waiting list for kids who must return to sp. ed. program, discussion with present principal.

3. Academic functioning level, background, attitude.


6. For kids who must return to sp. ed. program, discussion with present principal.


8. For red & yellow code, sp. ed. R.T. gives materials, direction for further support.

9. Materials, direction, etc.

10. (APR./MAY) Repeat process above, compare code.

11. Student file and code.

12. Student file and code.

13. Classroom teacher.


16. Student recorded, etc., and information put in student file.

17. Crisis situation:

   - RED: Action required?
   - GREEN: O.K.

18. For red & yellow code, sp. ed. R.T. gives materials, direction for further support.

19. Sp. ed. R.T. brings this information to the sp. ed. placement committee.

20. 2 yr. cycle over?

21. YES: End of follow-up.

22. NO: Repeat process above, compare code.
10.1.8.1 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement

1 - External

- Guidelines from CBO
- Advice from coordinator of sp. ed. when requested

Program approval (C.B.O./supt. of schools family)

- Staff needs
  - Advertisements
    - newspapers
    - internal

Hiring process (field office)

- Processing of new staff by Personnel dept. at CBO
- New staff
10.1.8.2 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement
2 - Internal

Principals, Supts. family, Sp. ed. resource teachers Coordinator
List of candidates identified by above personnel

Selection of Sp. Ed. teacher candidates from mainstream teachers in Peel county
List of candidates

Selection process by Field Office (C.B.O. for SERT only)

Selection of Sp. Ed. R.T. candidates from special services staff i.e.
- sp. ed. teachers
- psych. staff, R.T.s

List of candidates

External hiring to fill remaining positions (N.B. Sp. ed. tchrs. only)

NO

ENOUGH Sp. ed. tchrs. internally to fill pos.? YES

List of personnel for Inservice program

Inservice program (10.1.9)

Informaiton sent to
- Field Office
- CBO
- Principals

Processing of staff by Personnel dept. at CBO
10.1.10 SPECIAL STUDENT SERVICES: Budget

Expenditures to date
- Last year's budget
- Estimated expenditures for rest of year

Sp. ed./Psych attendance/Cont. Ed. each prepare budget estimates

Estimated budgets for each dept.

Compile Spec. Serv. budget for CBO (supt. of schools sp. serv.)

Compile budgets for each of 10 families w.r.t. sp. ed.

Budget estimates for each family (10 appendices)

Compile total sp. services budget

Supt. of academic affairs & spec. serv prepare budget for presentation

- Field Office budget Requests

Make appropriate modifications to the budget
- Yes
- No

Presentation of budget to the Board

Is there a difference between F.O. requests & C.B.O. est.?
10.1.11 SPECIAL STUDENT SERVICES: Curriculum Development

New program

List of kids for spec. ed. program

Determine needs for kids for spec. ed. program

Needs of kids in program

(Sept.)

Sp. ed. R.T., sp. ed. T., coord., supt. of school, identify curriculum needs

Determine what is necessary to supplement and complement core curriculum for sp. ed. purposes

Core curriculum reading, math - guidelines (curriculum dept.)

Other resources e.g. board, O.I.S.E., M.O.E., curriculum dept., Turner library, etc.

Committee set up for this purpose to adopt & modify core curriculum for spec. ed. (sp. ed. teach., R.T., coord., curr. dept.)

Needs of kids determine - prog. definition - objectives

(Oct.)

Design and develop new spec. ed. program curriculum

Core curriculum reading, math - guidelines (curriculum dept.)

Core curriculum reading, math - guidelines (curriculum dept.)

(Mar.)

Set up pilot program

Course outline

Evaluation and revision of sp. ed. program

Material needs as determined by committee on materials

(June/July)

Distribution of new spec. ed. program

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10.1.12 SPECIAL STUDENT SERVICES: Material Development

Program needs:
- integrated prog.
- contained prog.
- withdrawal prog.

Determine material needs - hardware & software, both short term and long term development

(Long term) Materials to be developed

Curriculum dept. input
Spec. ed. committee on program needs (refer to 10.1.11)

Materials development input to curriculum development education

Evaluation of materials (part of evaluation process of curriculum development)

Materials: specialized e.g. wheel chairs

(Short term) Informal needs

Formal needs - material display - sales rep.

Committee set-up to develop materials

Committee set-up to evaluate materials

Developed materials

Catalogue of materials for short term needs

Materials development input to curriculum development education

Resource materials
10.2.1.1 SPECIAL STUDENT SERVICES: Attendance – Casework

Usually school principal

Profile chart

Referral form

Begin processing absentee referral (F.O.)
- Check 'files for previous referral, etc.

New referral?

YES

NO

Open new file
- collect all available data relevant to school or family situation

Talk to student's
- principal
- teacher
- guidance counselor

Make informal assessment of approach to be taken – inform family of process

Case file made available to field office requesting

YES

Case on file?

NO

Case file by family 1 & school

C.B.O. files or field office

C.B.O. (Special Services)

C.B.O. Sp. Serv card index file

Field office Attendance counselor's card index file

YES

NO

O.S.R. -- schools attended

Class attendance records -- suspensions

Notification of referral -- to family

Student's family

Summary of home visit -- family relations

Assessment of family situation

Evaluation of student needs

Involvements with community agencies/medical/court

1 of 4

10.2.1.1 SPECIAL STUDENT SERVICES: Attendance – Casework

2 of 4

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10.2.1.1 (cont'd)

Parent/School/Pupil/Relatives

Support services

Community agencies

Parents

Schools

Medical advice

Other boards

School personnel

Decision on course of action

Implement decision - inform parties involved

Prepare and send written reports to agencies - set up conferences

Follow up case work counselling - Reassessment of student needs

Updated case file

Any progress?

Decision on further action (C.B.O. Involvement)

Medical personnel

Relevant details of cases inherited from other boards e.g. continued counselling

Instructions re action to be taken by school e.g. new class placement, transfer, daily reporting, etc.

Parents' consent to agency referrals

Request for parental consent to agency referrals

Parental consent

Daily report each day of absence (where applicable)

Schools'

Daily report each day of absence

Follow up case work counselling

Updated case file

Any progress?

Decision on further action (C.B.O. Involvement)

Medical advice

Relevant details of cases inherited from other boards e.g. continued counselling

Instructions re action to be taken by school e.g. new class placement, transfer, daily reporting, etc.

Parents' consent to agency referrals

Request for parental consent to agency referrals

Parental consent

Daily report each day of absence (where applicable)

Schools'
10.2.1.1 (cont'd)

School principal, agencies, etc. → Daily reports → Daily report profile → Parents

Send court warning letter (C.B.O.) → Assess response to court warning letter

Adequate improvement? → YES → A → Parents

NO → Arrange for pre-court hearing → inform participants

Pre-court hearing attempt to obtain a commitment from parties

Assess response to pre-court hearing (if commitment made)

Adequate improvement? → YES → A

NO → Set summons procedure in motion → Lay on information (J.P. sign)

Summons papers → Summons Bureau
10.2.1.1 (cont'd)

School principal

Certificate of attendance

Court proceedings (counsellor attends)

Written consent for counsellor to act as friend of child in court (if applicable)

Parents

Disposition of court
- return to school
- placement
- probation
- C.A.S. called in

C.B.O. files

"Check Sheet"
dates of case events

Record and carry out court order

Court action notification

Area Supt. & Chief Att. counsellor

C.B.O. files

“Check Sheet”
dates of case events

Student’s O.S.R.
Assessment of T.S. progress
- Report on request

Ministry of correctional services

Arrange for placement of training school students in community school

Details of wards of M. of C.S. returning to community schools

Student’s former school principal

Assessment

Rejected school

Case file

Choice of school and after-care officer (check sheet)

Name, address of after care officer

Confirmation of registration

Selected school

Memo giving notice of file closure

School currently attended

A

Close file

Memo giving notice of file closure
10.2.4 SPECIAL STUDENT SERVICES: Attendance — Reporting

- Caseload files
- Monthly review of file status (per attendance counsellor)
- Updated caseload record book
  - (JUNE)
- Prepare statistical and record book reports
- Analysis, comments, etc.
- Record book report
- Statistical report
- Area supt.
- (SEPT.) Prepare annual report to board
- Chief Attendance Counsellor
- Annual report to Board (Attendance counsellor services)
- Board
10.3.1 SPECIAL STUDENT SERVICES: Psychology Dept. — Psycho-Educational Diagnostic and Programming Services

Internal school records for previous years

Current teacher assessment and/or standardized tests

Reports from community personnel or agencies — esp. medical counselling

Professional development workshops related to child development, learning problems, etc. from psych staff & other sources

Expression of parental concerns

Identification of students within each school who need special consideration by local school staff

Discussion of situation by principal, teachers and counsellors at each school

Internal solution? YES

Any one or combination of the 3 activities (a), (b) or (c)

(a) Appropriate class placement by principal

(b) Appropriate programming and management by teacher

(c) Counselling by staff

NO

Identification of students within each school who require services or resources beyond the local school

Criteria for each of the services for referral

Discussion of situation by principal, teachers, and counsellors at each school

Referral to appropriate consultative services

External agencies

Special ed. offices (F.O.)

Attendance Counsellor

Other board consultants e.g., primary assistant

Psych. dept.

2
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3 of 4

10.3.1 (cont'd)

Directory of community services

Chief psych, other psych staff, professional literature other board consultants

Assessment information

Consultation with school staff, etc., on alternatives

Possible alternative courses of action

Psych. dept. & field staff: Decision recommendations to be made

Form filled and sent to C.B.O., indicating student referral has been processed

CBO: Student name is checked with the list of student referrals by school and checked off

Report: Summary of conclusions of assessment and recommendations to be made

Approval of report (chief psych..., other psych. staff)

NO

Re-assessment of situation

YES

Checkback or evaluation on the effects of the recommendation on the student with possible modification

Need modifications?

YES

Make appropriate modifications

NO

Case closed

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Copy of report to OSR (school)

Report sent to principal
- Copies for OSR and field office

Field office
- Copy of report for student file as identified by CBO index

Consultation with parents and verbal presentation of the report

Principals responsible for accepting and implementing the recommendations

Recommend accepted?

Principal handles situation. Consults with psych., staff, etc., as needed

YES

NO

Referral to community agency:
psych., staff

Counselling:
school staff, attend., psych., volunteer, etc.

Decide on Course of action

Home management:
parents

Remediation in regular class:
teacher plus spec. ed., R.T.

Attendance:
attendance counsellor

Placement in special ed program:
special ed placement committee
10.3.2.1 (cont’d)

Explanation to parent of volunteer service and gaining consent for pupil participation (school prin., F.O. psych mem.)

Parental consent?

YES

D

"Program Planning" for the student

- F.O. psych. staff
- Volunteer

Appropriate program/course of action

2 or 3 seasons weekly of volunteers with student to carry out planned program (Volunteer/student)

Consultation with/or supervision of the volunteer (Community coordinator F.O. psych staff)

- Additional information
- Changes in approach when necessary

Volunteer Coordinator, program director
- Outside resource personnel

Monthly In-Service program of skill development for volunteer (program director, community coordinator)

Year-end review of progress of each student with volunteer & decision re cont. or phasing out program (F.O. psych. staff)

Memorandum to program director whether volunteer should continue due to various courses

Year-end evaluation of program and assessment of needs for new year (program director Community coordinator)

Annual report

(JUNE)
SPECIAL STUDENT SERVICES: Psychology Dept. — One with One" Volunteer Program
(Search, Screening and Final Selection of Volunteers)

3 community groups take initiative in search for "Potential volunteers" (Com. coor.)

Community groups do screening of potential volunteers

Community groups carry out orientation of volunteers as to what the program is all about

Referral of appropriate individuals to board's director (i.e. office of chief psych.)

Personal interview of potential volunteers for assessment re: usefulness in any capacity — if useful, in what situation is best (program director)

Selection and listing of potential volunteers (%C.B.O. — program director)

List of volunteers available or assigned
10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program
(Program Planning for the Student)

Volunteer meets with teacher, principal, psych. staff member for discussion

- teacher/princ. suggestions
- assessment data
- program outline
- materials, etc. available

Determination of course of action or approach that the volunteer will take (volunteers - F.N. psych staff)

Course of action and appropriate program
10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program

Volunteer & psych. personnel discuss monthly progress report

If psych, staff thinks volunteer needs help, he gives additional information

Volunteer also consults with his community coordinator as needed

Program director & community director develop "In-service" program; which is introduced at the monthly meeting

Volunteer meets with fellow members of their own community group monthly

- Input from volunteers
- Resources, materials

- Monthly report
- Teacher reports etc.

-- Additional information
-- Changes in approach, when necessary

In-Service program
10.3.3 SPECIAL STUDENT SERVICES: Psychology Dept. – Administration

Input from teachers, principals of schools
- F.O. psych. staff

Input from principals
- F.O. psych. staff
- Chief psych.

Input from Supe rintendent of Schools, and Chief Psychology
- Specific data i.e. work load in each F.O.

Approval for hiring of additional staff and staff: student ratio (Board)

Recommendations by Chief Psychology as to placement to appropriate F.O.

Interview of applicants

Assignment of staff to Field Office (C.B.O. & F.O.)

Deployment of staff within field office (F.O. Super)

Profession development of staff (Chief Psych.)

Integration of psychology staff with other board consultative services (F.O.)

Evaluation (formal)

Supervision and evaluation of psychology staff (C.B.O. Super.)

Job descriptions

Staff needs
- F.O. Budget allowances

Staff needs
- F.O. Staff

Results of interviews

Evaluation of staff
- Chief Psychology

Interview of applicants

Staff deployment

Prof. dev. program set of topics for all staff
- Individual consultation and supervision with Chief Psychology

Input from
- Principals
- Chief Psychology
SPECIAL STUDENT SERVICES: Psychology Dept. — General Resource and Consultative Services

- Membership on board committees — communicate this way

- Reports — e.g. — emotionally disturbed, etc.

- Identification of areas of needs

- Identification of areas of need: e.g. early identification, affective education, etc.

- Meet jointly with other depts. for the development of provision of services

- Set up mechanism for provision of services: e.g. — committees — seminars — workshops

- dissemination of information regarding range of services available (all Psych. staff)

- Identification of areas of need: e.g. early identification, affective education, etc.

- Staff discussion with principals — bring up this aspect of activities in addition to referral services

- Annual report of Psych. dept.

- Observation in school — what is heard from parents, teachers, etc.

(FALL)
CONTINUING EDUCATION: Adult Education — Selection of Administrative Staff

- Previous year's enrollment, courses offered, etc.
- Administrative organization and policies for this year
- Preparation of advertisements for administrative positions
- G-memo 38 — qualifications, duties, how to apply
- Screening of Applications
- Letters of application — Resumes
- Request for ranking of candidates
- Completed rankings of each superintendent candidates
- Interviewing of candidates
- Letters of appointment
- Successful candidates
- Field Superintendents
- Day school principals
- Field Superintendent
- List of previous year's Ad. Ed. teaching staff
- Inform candidates and set up interviews by telephone
- Drawing up short list of candidates
- List of Ad. Ed. administrators by school
- All board teachers
- G-memo to all staff
- Requests for extended services
**CONTINUING EDUCATION: Adult Education — Brochure Preparation**

1. **Report to board (previous year)**
2. **Previous year's brochure**
3. **Master Sheets**
   - class code
   - subject
   - teacher & tel.
   - schedule
   - enrollment
4. **Ideas from other sources, e.g. conferences, other boards**

**Meetings with administrators**
- admin. instruc.
- introduce night school assistants
- procedures for choosing teachers
- procedures for registration

**Planning of "Adult Evening Courses" brochure**
Plan:
- course offerings
- class size

**Establish course offerings**

**Directors**

- Ideas, suggestions locally generated demand for courses, e.g. local surveys
- Availability of qualified staff
- Availability of facilities

**Printers (End of June)**

**Preparation of brochure**

**Brochure**

**Every Peel household (End of August)**
11.1.3 CONTINUING EDUCATION: Adult Education — Tentative Staff Selection

- **Preparation:**
  - **Information on former teachers**
  - **Teacher rating**

- **Screening:**
  - **Completed application forms**

- **Teacher application file:**
  - Acceptable former teachers & new applicants

- **Contact:**
  - Contact by telephone
  - Prospective teachers
  - Arrange interviews

- **Interview:**
  - Interview all new applicants

- **List of teachers:**
  - Tentative list of teachers (for each director)

- **Final Decision:**
  - New applicants

**Notes:**
- **Supt. of Schools Field Office**
- **Teacher rating**
- **Central office or night school assistants**
- **Teachers for ‘difficult’ courses**
- **End of May**
11.1.4 CONTINUING EDUCATION: Adult Education – Registration

C

(LATE AUG.)

Mail registrations names, cheques, courses

Filing of mail registrations and xeroxing of application forms

Temporary register for each Major school director by course (alphabetical)

Course oversubscribed? YES

Inform and refund unsuccessful applicants

NO

(AUG. 30th)

Registration (in person) at centres (2 nights)

Updated temporary register (each course)

Course oversubscribed or end of registration? YES

Compile master sheets (each school) i.e. registration statistics

(D)

Interested registrants Telephone

Decisions on under-enrolled classes. Can classes be combined?

Cancellation or transfer Transfer

Cancellation notice Cancellation

Inform teachers of viable classes (by telephone)

Prospective teaching staff Notice of teaching position

(EARLY OCT.)

Master sheets – enrollments – revenue (for each school)
11.1.6 CONTINUING EDUCATION: Adult Education -- Overall Evaluation of Adult Program and Report to the Board

- Regulations summary (leuger)
- Salaries
  a) teachers
  b) directors
- Adult evening class brochure
  - registration fee
  - material fees
- Preparation of recommendations to improve adult program incorporate in report to board
- Attendance registers
  - names, addresses
  - attendance hrs.
  - grades
- Statistical summary
  - enrollments
  - revenues
  - expenditures
  - geographical distribution of students
- Estimation of fees, minimum class size for next year
- Program committee
CONTINUING EDUCATION: Adult Education – Budget Estimates for next year

- Budget office
  - Print out of expenditures on current year so far
  - (OCT.)
  - Budget estimation
  - BD-2(a)
    - Proposed budget
      - (Adult Ed.)
        - Consultation, negotiations for budget approval
        - Approved budget for current year
CONTINUING EDUCATION: Summer School - Senior

History of school usage: to avoid overuse

School Factors
- air conditioning
- accessibility
- size

Choose locations for summer school (Sr (2 in north & 1 in south)

School is chosen for specific summer school use

Selection of administrative staff (see Ad. Ed. for details:
1. Director
2. Assistant directors

Ministry program guidelines

Evaluation of previous years program and suggestions

Estimate of student demand for summer school

Planning, advertising and promoting summer school program

Tentative estimates of resources req'd, e.g. teachers

Tentative staff selection
- screening
- interviewing
- ranking

Senior summer school file (ranked by subject)

Application and promotional rankings

Supt. of schools - field office

Teacher rating

Senior summer school teacher file

Business office

Board teachers

All senior students

Application forms
1. Memo G 47
2. Applications for teachers & subject positions

Interim letters of appointment
Meeting with liaison personnel (guidance counsellor etc.) to go through registration procedure.

(MID APRIL)

Distribute application forms to liaison officers

(MID MAY - END OF JUNE)

Directors
1. Maintain running totals for enrolments
2. File applications

Class lists and running totals

Declare a class?

YES

1. Inform teacher
2. Confirm student applications
3. Report enrolment

(JULY 9th)

Final enrolment by course

Final scheduling

Class Schedules
- subject
- times
- location
- teacher

Letter of confirmation of appointment

Acceptance of application

Teacher applicants

Student applicants

Summer school students

School liaison officers

Student application file and cheques

Student applications

Blank applications for senior summer school courses

Transportation officer (North)
11.2.1 (cont'd)

- Home teacher (Math or English)
- Prescriptive Diagnostics 7-8 Remedial
- Attendance monitoring and instruction (teachers)
- Summer school students

(AUG 9th)

- Summer school class registers

Determination of student eligibility for refund

Calculation of student grant hours

Academic reporting (teacher)

Refunds (if less than 3 days absent)

Summer school class registers (completed)

Student achievement form

Senior summer school students

M.O.E., provincial grant claim

Summarising attendance and academic results

Director's summary and evaluation of program

(MID SEPT.)

Board office

Ministry of Education

Preparation of report to the board - program committee

Report to the board

Home School (OSR)
Running sum of applications for summer school

(LATE MAR.)

Advert. for teachers

E.7 Request for applications for junior summer school teachers

Elem. teachers

Orders, coordinators, etc.

E.7 Request for applications for junior summer school teachers

Appointed summer school teachers

Letter of appointment

Board teacher file

(APRIL)

Coord. on to declare

Elem. principals

Tentative list of appointments

(Appointed summer school teachers)

(ENDER OF APRIL)

Coordinates, confirm teacher appointments

(ENDER OF MAY)

Attendance monitoring

Summer school class registers

3
11.2.2 (cont'd)

Summer school coordinators

Report to principal
- statistics
- evaluations J4 & S3

Preparation of report to Board Program Committee

Principal's evaluation of leadership program candidates

Report to board

Refund cheque

Parents

Anecdotal report
- skills tackled
- improvements made

(JULY 9th)

Form Sav

Report to principal

Board office

Supt. of academic affairs
11.3 CONTINUING EDUCATION: Drop-Out Referrals

Counsellor

- Time-table
- Last progress report
- Referral to continuing education

(ALL YEAR)

Tabulation of drop-out referrals

Dropout data form

Student drop-out file

Advice re Adult Student credit course

Dropout student
PREPARE FINAL ESTIMATES OF:
- GRANTS & REVENUE
- MUN. REQ.
Elem. & Sec.

Revenue fund "estimate" form (Me 323)

Estimate GL grants - elem - sec.

Estimated Rev.
Fund Statement
- schedule of Rev
- schedule of Expend.
- assessment

(ME 373-34)

Ministry

Ministry grant regulations

Actual Municipal Assessment data

Estimated GL grants for current year

Actual GL grant (Me 670)

Actual Financial Statement form (Me 305)

Actual expenditures for the year - elem - sec

(ME 325, 7, 8)

Municipality

Municipal Requisition - elem. - sec.
(i.e. mill rate)
Me 333-8

"letter" of Requisition

CALCULATION OF ACTUAL GRANTS & MUNICIPAL REQUIREMENTS

Actual enrolment reports from principal & ministry approved

Actual information from Municipality re:
- assessment
- payment in lieu of fares

Financial Statement Report

Auditor

Audit Statement + Financial Statement Report

Published Financial Statement Report (Summary Form)

Ministry

Public