

**Ontario Public School
Boards' Association**



**Contemplating Trusteeship:
A Guide for School Board Candidates
and Community Members**

2006 Edition

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Section One: School Boards and School Board Trustees

What IS a School Board???

A school board, known officially as “District School Board” in Ontario, is a publicly-elected body established by provincial legislation. The *Education Act* creates four different kinds of school boards: English public, English Catholic, French public and French Catholic.

A fundamental pillar of a democratic society is free education for its citizens. Public school boards provide universally accessible education for all students, regardless of their ethnic, racial or cultural backgrounds, social or economic status, gender, individual exceptionality, or religious background. Public school boards are founded on the principle of equality of educational opportunity. Ontario’s public school boards provide high standards in programming and ensure that there are supports and resources to help all students to reach those standards.

Governed predominantly by the *Education Act*, a school board has obligations that it must fulfil, including:

- Operating schools according to provincial legislation/regulation;
- Have a vision statement that reflects the board’s philosophy and local needs and priorities;
- Setting the board’s budget within the provincial grants and accompanying regulations
- Implementing curriculum according to ministry curriculum policy;
- Developing and delivering other programs that reflect provincial policies and local priorities;
- Hiring teachers and other staff required in their schools;
- Maintaining school buildings and property with regard to student safety and in accordance with provincial legislation;
- Monitoring their policies and the achievement of their students and, through the director of education, holding the entire system accountable for meeting provincial and board standards.

These are called “prescriptive duties” and failure of a school board to perform any one of these duties may result in that board’s liability to third parties who are in some way damaged by the board’s act or omission.

The Act also sets forth a large number of functions that a school board “may” do. These are called “permissive duties” and failing to perform these duties does not result in any liability. Examples of permissive duties include:

- Offer pupil transportation;
- Offer school libraries and resource centres;
- Operate school property as a playground, park or public skating facility;
- Offer qualified guidance teachers;
- Offer continuing education and evening classes;
- Operate cafeterias;
- Offer professional development courses for teachers;
- Offer programming in detention homes;
- Operate child care facilities and day nurseries;
- Offer benefits and insurance for its employees;
- Offer insurance for pupils.

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A school board is *not*:

- ✦ a parliament with party divisions. A school board is a single body made up of members (trustees). A school board should speak as one united voice.
- ✦ interested only in the opinions of families with children. A school board must recognize that all of society has a stake in public education.
- ✦ a sub-committee of the municipality. In fact, school boards govern budgets substantially greater than those of most municipalities. A school board is a closed or private body. All school boards are public institutions and their meetings are open to the public.

School Board Trustees – Who are they? Why are they important?

Officially, the *Education Act* refers only to *members of the board*. Historically, the members of a school board have been known as School Board Trustees, and are commonly referred to by that term still today. They are locally-elected representatives of the public, and they are the community's advocate for public education.

In a nutshell: A Trustee's job is to participate in making decisions that benefit the whole board while representing the interests of his or her constituents, and also to communicate the views and decisions of the school board back to the constituents.

Sounds simple? It is not. Because Ontario's communities are so diverse, the job of school trustee varies widely. Working as a member of the board to identify and clarify the values, priorities and expectations of the community, to translate those into policy and to follow up to see that the goals of the policy are being achieved, is time-consuming. A Trustee is responsible for identifying the needs and priorities of their community and for turning them into practical educational opportunities for students. This is no simple task because inevitably, trustees must mediate among conflicting interests and values. School trustees are the most direct way for the community to express itself in our schools. They play an important role in preserving our democratic heritage.

Among the many, often sensitive issues trustees deal with are **budgets and finance issues, property issues, suspensions and expulsions of students and communications with the community**. In some boards, trustees participate in the negotiations process as well.

The school trustee is a member of a team. Only the team (the Board), not an individual trustee, has the authority to make decisions or take action. A school board must place all students first when making any decision.

Trustees are responsible for establishing policy direction. Policies set out the expectations about what should happen or how services are to be provided within the school board. A well-written policy describes to parents, the public and the board's staff, what they can expect. However, trustees are not responsible for implementing a board's policies. That is the job of the administration and board staff.

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As members of the board, **trustees are accountable to the province**, through the Ministry of Education, for the proper conduct of their duties and powers, including the implementation of provincial policy and the use of provincially allocated funds.

Trustees are accountable to their electorate through the local election process. Balancing the demands of the community with the duties required by the Ministry of Education can be challenging, and takes dedicated leadership coupled with a willingness to seek innovative ideas and the courage to implement them.

Trustees are accountable for:

- ✦ Promoting a high quality public education system
- ✦ Advocating for improved student achievement
- ✦ Ensuring equitable programming and efficient delivery of education
- ✦ Focusing on accountability to ensure results
- ✦ Determining critical priorities and focussing energies and resources
- ✦ Working collaboratively with administration to support changes required to reach higher levels of performance from staff and students
- ✦ Responding to local needs and priorities
- ✦ Enhancing the level of accountability to the public on educational issues
- ✦ Representing the community
- ✦ Providing a communication link between community and school board
- ✦ Building collaborative relationships with political and business leaders
- ✦ Forging links with education partners, agencies and municipal councils
- ✦ Establishing board policies and budgets
- ✦ Monitoring implementation of policies and budget
- ✦ Helping to create a vision and structure for the school system
- ✦ Improving local board performance.

School Board Trustees are community leaders. School board trustees have a responsibility to all the families in their community – not just their neighbours, and not just families with school-aged children. They work with their school board colleagues and with other community partners to ensure that all the students within the board's jurisdiction have equal opportunities to reach their maximum potential. Trustees demonstrate their leadership in the following key areas:

Establishing Vision

- ✦ Promote strong quality public education
- ✦ Work with local community's vision of a strong public education system
- ✦ Engage community on achievement objectives
- ✦ Clearly define and articulate expectations for what students should know and be able to do
- ✦ Quantify those expectations and set agreed-upon measures for achievement

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Setting Standards

- ✦ Establish clear standards for student performance and communicate them continually
- ✦ Base standards on an external source that has credibility in the community

Undertaking Assessment

- ✦ Ensure that assessments are tied to established standards
- ✦ Use multiple, ongoing assessment measures
- ✦ Ensure that assessments are explained to the community

Promoting Accountability

- ✦ Measure the performance of all schools and school board itself against student achievement objectives
- ✦ Continually track progress and report results

Allocating Resources

- ✦ Ensure equitable allocation of resources to support students in meeting the curriculum standards
- ✦ Support parents in helping their children with school work
- ✦ Work within a framework of fiscal accountability

Establishing Climate

- ✦ Create a climate that supports the philosophy that all children can learn at high levels
- ✦ Empower staff to meet the needs of all students
- ✦ Model mutual respect and professional behaviour in board meetings and with the school and administrative staff

Creating Collaborative Relationships

- ✦ Model behaviour that emphasizes trust, teamwork and shared accountability
- ✦ Build collaborative relationships and partnerships with political and business leaders, labour organizations, education partners, parent and community groups, as well as other agencies

Promoting Continuous Improvement

- ✦ Commit to continuous education and training on issues related to achievement
- ✦ Use data on student achievement to set priorities for allocating resources
- ✦ Adjust strategic plan on the basis of data and community input

Establishing Communications

- ✦ Establish and maintain excellent communication with community, parents and staff
- ✦ Educate public concerning current issues in education
- ✦ Inform community regarding the annual budget review
- ✦ Encourage community involvement and commitment to improving achievement for all students
- ✦ Facilitate engagement between the community and the educational system.

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But what do Trustees do?

Attend Board Meetings and Committee meetings. Trustees are expected to attend all board meetings and all meetings of board committee of which they are members. If a trustee expects to be absent from a regular board meeting, they can authorize their absence by board resolution at a preceding board meeting. Trustees who miss three consecutive meetings (without authorization) vacate their seat on the board, according to the *Education Act*.

Attendance at these meetings can be in person or through electronic means. All boards have a policy, in accordance with the *Education Act*, which outlines the circumstances under which trustees can attend meetings electronically. The Education Act requires a minimum physical attendance of board meetings at least 3 times during each calendar year.

Board meetings are not, however, the only time commitment for trustees. To get a full picture of board-related requirements, candidates should check with their local school board office. Preparing for a board meeting by reviewing all the material can be a time-consuming endeavour.

Other duties at the School Board. There are other obligations for school board trustees to undertake as part of their role as a member of the school board. Some of these are statutory (meaning mandated by the province) and some are not. Statutory duties include the appointment of a trustee to various committees such as the Special Education Advisory Committee, or the appointment of a trustee to board-based quasi-judicial proceedings such as suspension/expulsion proceedings. Non-statutory obligations may include participating in ad hoc committees or working groups of the board. The nature and frequency of “other duties” varies significantly from board to board. Candidates should check with their local board for information on these types of responsibilities.

Attend Community Meetings as a representative of the School Board. Because one of a trustee’s key responsibilities is to facilitate communication between the board and community groups, they may be asked to attend meetings such as: school council meetings, community groups, municipal councils and municipal committees, meetings with MPP’s and MP’s, and other community agencies such as district health councils and library boards. In order to gain an understanding of your community, it will be helpful to attend school events and community functions (such as concerts, fairs, festivals and other celebrations). Often, community meetings are held at night to enable working parents to attend.

Help parents and others with concerns by answering questions, finding solutions and facilitating interaction with the school or the board administration. A trustee is often the first point of contact for parents and community members who have questions and/or concerns about their local school. A trustee’s role may include liaising with parents and school or board administration to find solutions to issues and concerns. Individual trustees do not have the authority to direct board staff to undertake any particular action.

Responding to telephone calls, meeting requests and mail from constituents will require a commitment of time.

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Can anyone be a School board trustee?

Eligibility

In general, any person may run for election to a district school board as long as he/she is:

- Resident in the area of the jurisdiction of the board;
- A Canadian citizen;
- At least 18 years old;
- Eligible to be an elector of the school board for which the person is a candidate; and
- Not disqualified from holding office by the Municipal Elections Act or any other legislation

A person is ineligible if:

- They are an employee of any district school board or school authority;
- They are a clerk, treasurer deputy clerk, or deputy treasurer of a county or municipality within the board's jurisdiction;
- They are a member of the Provincial Assembly, the Senate, or the House of Commons;
- A Crown employee within the meaning of the *Public Service Act*. If you are a Crown employee, you must follow all the relevant provisions of Part III of the Act;
- Prohibited from voting at the municipal election under sub-Section 17 (3) of the *Municipal Elections Act, 1996*;
- A person who is serving a sentence of imprisonment in a penal or correctional institution;
- A person who was convicted of a corrupt practice described in sub-Section 90 (3) of the *Municipal Elections Act, 1996*, during an election that occurred less than four years before Monday, November 13, 2006;
- A candidate who was convicted of a corrupt practice under the *Municipal Elections Act, 1996* or of an offence under the *Criminal Code (Canada)*, in connection with an act or omission with respect to a municipal election if the voting day in that election was less than six years before Monday, November 13, 2006; and
- Disqualified from being elected to or holding office by reason of any violations of the election campaign financial requirements or violations for not filing the financial statement pursuant to the *Municipal Elections Act, 1996*.

(Note: In the first and second case above, a person can become eligible by taking an unpaid leave of absence prior to filing their nomination papers, until the election has been held)

Experience

Trustee candidates do not need to have a background in education. However, there are different types of experiences that would benefit potential trustee candidates interested in seeking election to the district school board.

Basic understanding of official meeting procedures. School board meetings are conducted according to bylaws and official procedures. No experience with this is necessary, but trustee candidates need to be aware that there are rules of procedure at board meetings. Simply calling out your comments is not acceptable. Candidates should review a copy of their board's bylaws and observe meetings to get an understanding of the process.

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Basic understanding of board-based governance. Many school boards have a governance model that they use to clarify roles and responsibilities. Sometimes, this may simply be the board's bylaws. In other boards, it may be a highly detailed process that the board has adopted as policy. Trustee candidates should be familiar with the board's governance policies and understand how this policy impacts their role as a member of the Board. Many boards also have a Trustee Code of Ethics. Candidates should be aware of these types of mechanisms when making their decision to seek election.

Basic understanding of a Trustee's role as a member of a Board. The *Education Act* does not give individual trustees legislative authority in any way and refers only in a limited way to their responsibilities. Trustee power lies solely in membership on the corporate school board. As members of the corporate board, trustees are legally accountable to the public and to the Minister of Education for the collective decisions of the board and for the delivery and quality of educational services. This means that once the Board of Education has voted, it is a trustee's responsibility to act in a manner that promotes and supports the board's decision by developing policy and approving procedures, and to communicate the board's decision back to the constituency.

Some awareness of the legal, political and legislative parameters in which school boards operate. School board operations are often highly prescribed by legislation or regulation or other forms of provincially driven policy. School boards are bureaucracies, with all the frustrations and roadblocks that are associated with bureaucracies. Candidates need to be aware of this fact, especially when making campaign promises. For example, promising to eliminate a provincially-mandated program can make a candidate look silly.

Willingness to learn. A newly-elected school board trustee has a fairly steep learning curve, and must be willing to spend time becoming familiar with existing board policies and relevant legislation. It is far easier to bring about change, when one understands why things are the way they are.

Acceptance to serve on a school board assumes an awareness of the legislated expectations and responsibilities conferred through legislation, provincial policy, contractual agreements or any other mechanism. Trustees must act within these parameters, and be aware of the consequences of decisions that don't respect these commitments. Anyone considering candidacy for school board membership should carefully consider these relationships and responsibilities when making the important decisions to serve, or continuing to serve, on a district school board.

Board Administration:

The most important leadership relationship in the school system is the one that exists between the Board of Trustees and the Director of Education. While their roles are distinct and different, they must also be complementary for the system to operate effectively. Each board's success depends on the leadership of the Director of Education. Each Director of Education's job is greatly influenced by the successes and challenges of the Board. Both parties need to be cognisant of their inter-dependence, and willing to work cooperatively for the successes of the system and the students in the schools.

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Organisational structures differ among boards. However, all board administrations will have an hierarchical reporting structure headed by the Director of Education and supported by Superintendents or Supervisory Officers. Principals and managers of various departments may report to Superintendents or directly to the Director.

The school board's administration manages the day-to-day functions of operating the school system. They are responsible to the board for monitoring the performance of schools and student achievement, which is measured against provincially established standards. The administration is responsible for the identification and provision of specialised services for students; for the administration of a budget which ensures efficient use of resources on an equitable basis; for student transportation services according to board policy; for maintenance and operation of board facilities; for the negotiation, and implementation of collective agreements with staff unions; and for the implementation of policies and procedures set forth by the Ministry of Education and the District School Board.

Trustees and School Councils:

Effective trustees establish regular and consistent communication with their school councils. Through the use of email, newsletters, meetings and other public forums, trustees and school councils can remain in constant communication. Increasingly, trustees are creating online journals, websites or web-logs (a.k.a. blogs) to help them communicate with their constituents. These various mechanisms help the trustee stay informed about the issues that are relevant to their schools, and helps the school councils understand the operations of the board itself. Provincial policy requires boards to continue to include their school councils in an advisory role at the board level. Trustees that facilitate communication among school councils within their jurisdiction are better able to speak on their behalf at the board table.

School councils are provincially-mandated advisory bodies, providing advice to the school principal and, where appropriate, to the school board. Their structure and responsibilities are determined by government regulation. When operating effectively, they offer a practical way to focus the energy and resources of parents, communities, and school staff for the benefit of students. A trustee that has open and consistent communication with school councils is creating a climate of inclusion that benefits the board and the students in its schools.

It is important to note that a trustee's responsibility is to advocate for decisions which will better serve the board's entire jurisdiction, while school councils advocate almost exclusively for their own students in their own schools. This is an important point to remember when determining what issues should be decided at what level.

Accountability: What is it? How do we get it?

Accountability relies on a shared vision of goals and objectives, a clear division of responsibilities, reliable ways of evaluating how those responsibilities are being funded and met, and strategies for providing understandable,

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accurate information about performance. Accountability also involves taking responsibility for any differences between expected and actual performance results, and where results don't meet expectations, explaining the steps to be taken to improve the situation. A common understanding of a school board's role and responsibilities is fundamental to any discussion about accountability.

Candidates choosing to serve on a public body such as a school board must understand clearly the government's expectations and the responsibilities of the position, as conferred through legislation, regulation, agreements or any other mechanism. Prospective and incumbent trustees must understand fully the accountability relationship between the government and the school board when making the decision to serve (or continue to serve) as a school board member.

Dr. Mordechai Rozanski made the following statements about accountability in the 2001 Report of the Education Equality Task Force:

"In the context of Ontario's publicly funded education system, reciprocal accountability means that every demand by the public and the Province for improved performance involves a responsibility to provide appropriate resources to meet the demand, AND that every investment accepted requires school boards, principals, teachers, and other staff to demonstrate accountability for using those resources efficiently and effectively for the purpose intended."

OK, I've Read it All, and I want the Job. What next?

Nomination: Interested candidates must file nomination papers. These papers can be obtained from any municipal clerk's office. Nomination papers may be filed with the school board election clerk between January 1, 2006 and September 29, 2006. The deadline for filing nomination papers is 5 p.m. on Friday September 29, 2006. There is a prescribed nomination filing fee of \$100 which must be paid when a candidate files their nomination. (Check with the municipal clerk's office regarding accepted methods of payment.) A candidate is entitled to a refund of the filing fee if he or she is elected, or receives at least 2% of the votes cast for the office, or withdraws the nomination. A candidate may only be nominated for one local government office in the Province of Ontario at a time.

It is important to note that in most parts of the province, school board jurisdictions and trustee electoral districts include multiple municipalities. **School board candidates should be aware that nomination papers for each position of school board trustee must be filed with the electoral district's School Board Election Clerk.** For each electoral district, the School Board Election Clerk will be the municipal clerk in the municipality that has the largest population of the board's electoral group (English-public, English-Catholic, French-public, or French-Catholic). Candidates who are uncertain about which municipality has the School Board Election Clerk should call their local school board for assistance.

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The clerk will certify or reject candidates' nomination papers by 4:00 p.m., Monday, October 2, 2006. Candidates may be required to show proof of identity and qualifications prior to certification.

If a candidate changes their mind about running for election, they may withdraw their nomination by notifying the municipal clerk, in writing. The deadline for withdrawal is 5 p.m., Monday, October 2, 2006. Candidates who withdraw are entitled to a refund of the nomination fee. However, these candidates are still required to submit a financial disclosure covering the financial transactions made up to the point at which they withdrew.

Campaign Finance Rules: All candidates are responsible for acting in accordance with the financial provisions set out in the Municipal Elections Act, 1996. Candidates should become familiar with these provisions. The key points are summarized below.

All municipal candidates, including school board candidates must ensure that a separate account at a financial institution is opened exclusively for campaign purposes in the name of the candidate's election campaign. Even if a candidate plans to finance their campaign from their own funds, all expenses incurred for the campaign must be considered contributions and reported as such, including the issuance of a receipt.

The Campaign Period defines when a candidate can accept contributions or expend dollars in support of the campaign. The Campaign Period begins on the day when the candidate files a nomination for office, and ends on December 31, 2006. Contributions cannot be made to or accepted by a candidate nor an expense incurred outside of his or her campaign period, and candidates cannot accept campaign contributions before they are nominated. At the end of the campaign period, all candidates are required to file a financial statement with the municipal clerk and should ensure that an accounting system that meets the requirements of the Municipal Elections Act, 1996 be used.

The limit on contributions in money, goods or services from any individual, corporation or trade union is \$750 to any one school board candidate. This limitation applies whether the contribution consists of one large donation or is the total of smaller contributions. (Note, there is no limit on personal contributions from the candidate.) A candidate must issue receipts for every contribution of money, goods or services accepted, including those from a candidate and his or her spouse. All monies must be deposited intact into the candidate's campaign account.

There are limits on the amount a candidate may spend on expenses during the period commencing on the date the candidate files a nomination and ending on voting day. The limits on campaign expenses are based on a formula related to the number of electors in the school board's jurisdiction in which the candidate is seeking office. The formula for maximum campaign expenses for all school board trustee candidates is \$5,000 plus \$0.70 per eligible elector. The municipal clerk will inform you of your spending limit by Monday, October 9, 2006.

Payment of any campaign expense must be made by cheque drawn on the campaign account and a receipt providing the details and proof of payment must be obtained.

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All nominated candidates, including those not elected, those who withdrew their nomination, or those who whose nomination was rejected by the municipal clerk, must disclose and report their contributions and expenses as of December 31, 2006. The forms for filing a financial report are provided by the municipal clerk's office. If a candidate has a campaign deficit, they may extend the campaign period. Intention to extend the campaign must be made in writing and delivered to the municipal clerk by January 2, 2006. Financial reports must be filed by April 2, 2007.

If disclosure and reporting requirements are not met, an elected candidate may be subject to a suspension from office without pay until the financial returns are filed. All candidates are disqualified from running in next election if financial returns are not filed within three months of the due date.

A detailed description of campaign finance rules, including contributions and fund-raising can be found on the Ministry of Municipal Affairs website:

http://www.mah.gov.on.ca/userfiles/HTML/nts_1_8570_1.html

Section Two: Education in Ontario (A Quick Glance)

The History of School Governance and Structure in Ontario

Education first fell under state control in 1807 with the passage of the *District Schools Act*, which allocated £800 for the maintenance of a “public school” in each of Upper Canada’s eight school districts. Under this Act, the public school was regulated by five trustees per district, who were appointed by the lieutenant governor. The trustees were not required to report to the government in any way, and their duties were limited to the hiring of a teaching master, who was responsible for the expenditure of funds. While state funds were expended on education, attendance at the “public” school required payment of a tuition fee.

The *Common Schools Act* of 1816 became the principal legislation governing education, giving state assistance to all institutions known as “common schools”. This Act governed until Confederation in 1867, with many amendments. The *Common Schools Act* required each school’s trustees to report on spending and public examinations, to set regulations regarding teacher salaries and qualifications, and allowed for ten free scholars in each common school. Significant amendments to the *Common Schools Act* in 1841 had permanent implications on the governance and structure of public education institutions. Property taxation for education and the concept of religious immunity were introduced at this time. Another amendment eliminated local school trustees and gave educational responsibilities to municipal “township councillors”. While this amendment was rescinded two years later at the request of the township councillors, the model of a provincially administered education system with locally administered bodies of authority became the basis for educational governance in Canada.

Egerton Ryerson’s efforts over a 30-year span advocated and expedited a “unified system of free common schools”. He gradually implemented centrally administered controls of the local schools and led an effort to permit school districts to raise revenues through the collection of property taxes. By the early 1870’s Upper Canada had a system of compulsory, free, and tax-supported elementary schools. It was not until the 1940’s that the provincial Department of Education began to advocate the establishment of district secondary schools with a common-wide program. As this change in educational practice became more widespread, the number of secondary school boards increased along with duplication and bureaucracy.

At one time, the province of Ontario had 5,747 school sections, most operating a one room school. In 1965, the first round of consolidation reduced the number of public school boards in rural areas from 1850 to 423 and the number of urban boards from 258 to 182. Then, 1969, the elected county boards of education were established as the smallest unit of school administration, responsible for both elementary and secondary education. In 1985, the provincial government extended full funding to separate secondary schools, resulting in 172 public and separate school boards, district school area boards or hospital school boards.

In 1997, the provincial government reduced the number of school boards to 69, and 37 school authorities, creating four types of boards for the province: English public, French public, English Catholic and French Catholic.

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Education Funding

The fiscal year for school boards is September 1 to August 31. A financial plan, or budget, which reflects the needs of students and school boards' educational priorities is developed and approved, each year, by the Board. The financial plan, together with program planning, facilities planning and strategic planning assist the Board in managing its total resources.

School boards are responsible for establishing the Board budget – and for operating within it. Boards are legislatively required to plan for balanced budgets. Setting the board's budget is one of the most important tasks a trustee participates in as a member of the board because it ensures that available dollar resources are properly allocated to meet Provincial and Board priorities to achieve the desired student outcomes. Budget deliberations may include questions related to viability of program, where and how to operate facilities within the pupil accommodation funding and staffing matters.

The Education Act makes boards accountable to the province for balanced budgets and the effective use of available funds.

Property Taxes

Prior to 1998, school boards determined their annual budgets based on revenues received through provincial grants and by levying local property taxes. School boards could decide whether or not to increase local property taxes and, if so, by how much. Municipalities collected the taxes on behalf of school boards. In 1998, the government assumed full control of the property tax revenue portion while introducing a provincially-developed funding formula which determines the revenue for a board based on a series of formulae within the various grants.

Property taxes continue to support the education system. The Minister of Finance sets education tax rates and municipalities levy and collect the taxes. Municipalities forward education taxes to school boards in four instalments annually, unless alternative arrangements have been agreed to by the school board and municipality. The Ministry of Education, using the annual legislative grant regulations, determines each board's overall allocation. Property tax revenues form part of the allocation, and the Province provides additional funding up to the level set by the funding formula.

The Funding Model

The Funding Model or Funding Formula is the provincial policy used to allocate funds to each school board across the province and fund provincial initiatives. It incorporates funding per pupil or other specific allowances. It establishes expenditure parameters within which a board must budget, and areas of expenditure are clearly defined.

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The Funding Formula is based upon four broad categories: the Foundation Grant, the School Foundation Grant, Special Purpose Grants, and the Pupil Accommodation Grant.

The Foundation Grant and School Foundation Grant make up over 50% of the total allocation to the school board. The Foundation Grant provides funding, on a per pupil basis, to cover the basic costs of educating a student. This allocation covers costs related to classroom teacher; teacher assistants; textbooks and learning materials; classroom supplies; classroom computers; library and guidance services; professional and paraprofessional services; preparation time; and classroom consultants; The School Foundation Grant provides funding to allocate each school a principal and a secretary. Vice Principals are also funded from this grant, based on school enrolment.

Special Purpose Grants recognize that the cost of education varies significantly depending upon the needs of the student, the variability in program needs, location, language, etc. Current special purpose grants include: primary class size reduction; special education; language; learning opportunities; continuing education and other programs; teacher qualifications and experience; transportation; school board administration/governance and declining enrolment adjustment.

The Pupil Accommodation Grant has three main grant allocations that recognize the cost of operating schools, maintaining schools and providing new school accommodation where the number of student spaces within the jurisdiction of the school board is less than the total student enrolment within the school board.

The Funding Formula is a “living document”, meaning that it adapts annually to the economic pressures and political priorities of the government. The model establishes the parameters within which the board must operate. Boards allocate the funds to bring the board into compliance with provincial regulation and only then, in accordance to its own priorities. As an example, here is an incomplete list of some more commonly-recognized provincial expenditure parameters:

- Funds designated as classroom expenditures must remain within the classroom area
- Funds designated as special education reflect a Board’s minimum expenditure and must be used for special education
- Funds allocated for administration/governance are the maximum, and the board’s administration/governance expenditures cannot exceed the funding model allocation
- Funds allocated for building renewal must be used for building renovations or upgrades.

The *Education Act* (and its regulations) contains provisions for class sizes at various grade levels. The Act also includes provisions for the establishment of average instructional time for secondary teachers. These provisions must be taken into account when budgets and staffing levels are established.

A board may raise additional miscellaneous revenues from activities such as rental fees for the use of school space, cafeteria fees, tuition fees from foreign students, and the sale or lease of surplus school space.

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Education Development Charges

The *Education Act* and an accompanying regulation set out the legislative framework under which boards can pass by-laws implementing education development charges on new development within the Board's jurisdiction. These charges are an option for funding new school sites.

Curriculum

Curriculum policy documents from the Ministry of Education describe the overall and specific learning expectations for students in Grades 1 to 12, according to subject area.

In the elementary panel, the following subject areas have curriculum policy documents:

- ✦ The arts
- ✦ French as a second language (core, extended and immersion)
- ✦ Health and physical education
- ✦ Language
- ✦ Mathematics
- ✦ Native languages
- ✦ Science and technology
- ✦ Social studies

In the secondary panel, the following subject areas have curriculum policy documents:

- ✦ The arts
- ✦ Business studies
- ✦ Canadian and world studies
- ✦ Classical and international languages
- ✦ English
- ✦ English as a second language/English literacy development
- ✦ French as a second language (core, extended and immersion)
- ✦ Guidance and Career Education
- ✦ Health and Physical Education
- ✦ Mathematics
- ✦ Native languages
- ✦ Science
- ✦ Social sciences and humanities
- ✦ Technological education

The Ministry of Education has developed “achievement charts” to accompany each curriculum policy document. The achievement chart is a standard province-wide guide to be used by teachers. It enables teachers to make

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judgments about student work that are based on clear performance standards and on a body of evidence collected over time.

The achievement chart for each subject area and discipline is designed to:

- provide a common framework that encompasses all curriculum expectations for all grades and all subjects/disciplines;
- guide the development of assessment tasks and tools;
- help teachers to plan instruction for learning;
- assist teachers in providing meaningful feedback to students;
- provide a variety of aspects (e.g., use of thinking skills, ability to apply knowledge) on which to assess and evaluate student learning.

In 2004, the Ministry of Education established the **Literacy and Numeracy Secretariat** to work collaboratively with school boards to develop strong linkages and alliances to support learning. The Secretariat collaborates with boards to ensure that appropriate resources, strategies and tools are available to ensure excellence in teaching and learning. The government's goal is that 75% of 12-year olds reach the provincial standard on province-wide testing by 2008.

The Ministry of Education's Literacy and Numeracy Secretariat will help Ontario students achieve this goal. The Secretariat will work with school boards to:

- Strengthen the focus on literacy and numeracy;
- Negotiate targets and discuss implementation plans with a view towards building a greater capacity for improving student learning;
- Share successful best practices among schools and districts;
- Extend the knowledge base of the profession;
- Increase the capacity to support learning; and
- Engage parents, school councils, business, community members and trustees to further support student achievement goals.

In order to graduate, secondary school students must earn 30 credits to receive their secondary school diploma of which 18 credits are compulsory, and 12 are optional. Schools must offer sufficient secondary courses and course types to allow students to meet diploma requirements. Courses are organized along three 'streams': academic, applied and "open". *Academic courses* emphasize theory and abstract problems. *Applied programs* focus on practical applications and concrete examples. *Open courses* prepare students for further study in certain subjects and to generally enrich their education. *Transfer courses* are also available, allowing students to switch streams if their post-secondary plans change.

In addition to the course requirements, all students are required to successfully complete the Grade 10 Ontario Secondary School Literacy Test (or the Ontario Secondary School Literacy Course), and complete 40 hours of

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community involvement to be awarded the Ontario Secondary School Diploma (OSSD).

Education Quality And Accountability Office

The Education Quality and Accountability Office was established as an arms length agency of the provincial government, designed to conduct provincial standardized testing and assessment of students.

Regular province-wide testing of students is conducted in Grade 3 (end of the Primary Division) and Grade 6 (end of the Junior Division) in language and mathematics. In Grade 9, province-wide assessment of mathematics occurs, and in Grade 10, a province wide assessment of literacy skills is undertaken. These assessments are conducted by the Education Quality and Accountability Office (EQAO) in order to measure student performance and report the specific results to teachers and parents. The broader results are shared openly as a component of public accountability.

The EQAO designs and implements a comprehensive program of student assessment within government-established parameters and advises the Minister of Education on assessment policy. They develop and implement a provincial performance indicators system and lead Ontario's participation in national and international assessment and indicators work.

The EQAO promotes research in best practices in assessment and accountability and reports to the Minister, the public and the education community on system quality issues and recommends improvements.

For further information, check out the EQAO website at: www.eqao.com

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What Is OPSBA?

The Ontario Public School Boards' Association (OPSBA) represents public district school boards and public school authorities across Ontario, which together serve more than 1.3 million public elementary and secondary students. The Association advocates on behalf of the best interests and needs of the public school system in Ontario. OPSBA is seen as the credible voice of public education in Ontario and is routinely called upon by the provincial government for input and advice on legislation and the impact of government policy decisions.

Statement Of Mission And Beliefs

The mission of the Ontario Public School Boards' Association is to promote and enhance public education by:

- + helping member boards to fulfil their mandates
- + developing effective partnerships with other groups interested in public education
- + providing a strong and effective voice on behalf of public education in Ontario.

OPSBA believes that the role of public education is to provide universally accessible education opportunities for all students regardless of their ethnic, racial or cultural backgrounds, social or economic status, individual exceptionalities or religious preference.

Excellence in education is achieved by:

- + promoting high standards of individual achievement
- + providing the understanding and basic skills required for active, compassionate participation in the life of the family, the community, the province, the nation, and a global society
- + cultivating a love of learning
- + recognizing the value of diversity among learners and communities; and
- + exploring creative educational alternatives.

To maintain excellence, the public school system must be accountable to the community it serves and work to fulfill its mandate through building strong community partnerships.

Local democratically-elected schools boards play a key role in ensuring that schools remain responsive to both provincial program requirements and local needs and resources.

OPSBA Services And Membership

A public school board joins OPSBA annually by a resolution of the board and payment of the annual membership fee. Individual trustees do not pay membership fees. Once a board has joined OPSBA, all board trustees are automatically members of the Association and can fully participate in all Association activities, programs and the

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decision-making process. In this way, a public school board is a corporate member of OPSBA and its trustees form the individual membership. OPSBA services are designed to benefit and meet the needs of boards as corporate entities, as well as meet the individual needs of trustees.

All public Boards are members of OPSBA for many good reasons. They include high quality services, the collective influence on provincial government decisions, participation at government work groups and committees that develop education policy and the money saved through collective cooperative action among all the boards. Every member board saves its annual membership fee many times over by maintaining its membership in OPSBA.

While there is substantial financial reason for membership in OPSBA, there is equal value in the information that the Association makes available to its membership. OPSBA membership provides numerous opportunities for trustees to become knowledgeable about emerging issues, the implications of new legislation and policies and to hear from and exchange ideas with legal experts, top politicians and senior Ministry staff as well as Federation leaders first-hand. Most member Board trustees consider this to be an important, if not essential part of their role.

School board trustees from across the province benefit from participating in the Association's grassroots operational and policy development mechanisms. Through various committees, work groups, regional councils and the Board of Directors, trustees can be elected and/or appointed by their peers to participate in all aspects of the Association's business, from influencing provincial policy to planning conferences to honouring fellow school board members.

OPSBA is non-profit, non-partisan, democratically run and exists to serve its members by influencing government legislation and policy and by providing valuable services to member Boards much more cost effectively than can be provided by individual Boards acting in isolation. OPSBA also provides an increasingly effective, unified voice for public education.

Key Service Areas

Labour Relations

OPSBA provides member boards and other education stakeholders with information on labour relations and human resources issues that affect public school boards in Ontario. Services to senior board staff and trustees include: regular meetings of the Provincial Labour Relations Network; legal advice and analysis on relevant legislation; an annual Labour Relations Symposium and workshops; and access to the Labour Relations Network (LabRnet). LabRnet is a restricted internet website available to public and Catholic school boards throughout Ontario. The website provides board practitioners and trustees with information on negotiations, legal opinions, Occupational Health and Safety, education reform, and arbitrations, as well as a comprehensive searchable database of collective agreements.

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Program and Student Services

OPSBA advocates for its member boards and for all public school students with respect to curriculum matters, assessment matters, learning programs and special education policy. This is done through participation on Ministry committees and work teams, information-sharing, position papers and Ministry officials attending OPSBA events and meetings.

The government has established improvements in literacy and numeracy as one of its major priorities. OPSBA fully supports this goal and has embarked on strategies and policy directions intended to remove barriers to learning experienced by many students as well as promoting initiatives that will make optimum student achievement a reality for every child.

Education Finance

Lobbying and public awareness on education finance issues are significant priorities for the Association. OPSBA monitors, researches and reports to member boards on government policies relating to legislation and education finance. The Association develops discussion and position papers on education funding, governance, and school board operations. In November 2005, the Association released position paper that highlights the pressing funding formula issues that boards continue to struggle with. This position paper, entitled Funding for Student Success; Funding Model Review, has been endorsed by many of OPSBA's education sector partners, such as the Catholic trustees' association, and others.

The development of the OPSBA Finance Database has allowed the Association to develop and deliver messages regarding education finance with accurate, factual and current information. Additionally, member boards can contact OPSBA staff with individual board requests for data and analysis.

The Finance Technical Team is an advisory group of business officials from OPSBA member boards who advise OPSBA on issues relating to the development and enhancement of the OPSBA Finance Database. The Finance Technical Team also provides advice to the Association on the technical aspects of government finance announcements.

Energy

OPSBA continues to tackle the enormous pressure of rising energy costs on behalf of school boards. Through the Ontario Educational Services Corporation, OPSBA works to ensure sustained energy savings for all school boards through energy intervention work at the Ontario Energy Board.

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Lobbying and Government Relations

OPSBA directs government attention to the views of public school boards on public policy affecting public school boards, the publicly-funded school system, and children's issues. The Association routinely communicates with the Minister of Education and senior government officials, and government members from all political parties.

While the Legislature is in session, OPSBA staff issue a legislative synopsis detailing the events that occurred that are relevant to the education sector. This gives trustees and board staff the opportunity to quickly ascertain what discussion occurred in the Legislature about an issue of concern to them, as well as information on any debates that took place and the results.

Lobbying on federal issues is undertaken through our membership with the Canadian School Boards Association (CSBA). Through CSBA, OPSBA lobbies the federal government on taxation issues, children's issues, immigration issues, aboriginal issues, and copyright issues.

Communications and Media Relations

OPSBA works proactively with the media and maintains ongoing contact with reporters and journalists to ensure that the collective views of public school boards are reflected in media coverage.

OPSBA works cooperatively with communications personnel at the school board level to facilitate information sharing and consistent messaging on issues of concern.

OPSBA has established a website for use by member boards and the general public. Timely and vital information is updated on our website daily.

Governance

Lobbying and public awareness on education governance issues continue to be a priority for the Association. OPSBA researches and reports to member boards on issues impacting school board governance, and monitors provincial legislation for issues that impact a school board's ability to operate effectively. OPSBA submits position papers to the government on governance-related issues.

OPSBA develops positions on governance by considering legal liability, corporate responsibility and adherence to statutory obligations. The Minister of Education has indicated that school boards can expect legislation dealing with school board governance issues prior to the 2006 local elections. OPSBA will be active in ensuring that any legislative changes support and enhance school boards' governance structures.

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Professional Development and Board Management Services

OPSBA offers an informative and timely annual program of two-day conferences, one-day workshops, and seminars to develop and refine the management and leadership skills of public school trustees. OPSBA also provides legal and other professional advice to member boards on matters such as school board operations, conflict of interest, tendering practices, provincial laws and regulations affecting school management, compliance on school closures, copyright, and government legislation.

OPSBA has developed an on-line, interactive board member development program called the Board Learning Centre, in partnership with provincial school board associations in Alberta, Saskatchewan, Manitoba and Newfoundland and Labrador, coordinated by the Canadian School Boards Association. The Board Learning Centre (BLC) is a series of web-based, multi-media training modules that define a curriculum of trusteeship, designed to strengthen school board governance and provide timely, accessible and cost-effective training. The learning opportunities presented on the BLC complement and support the face-to-face learning offered by boards and OPSBA events. The site is password-protected for member boards and can be accessed from the OPSBA website.

Legal Defence for Public Education

OPSBA maintains a legal defence fund for representing and defending the interests of all public school boards in court challenges and in other legal matters that may arise.