



**WINDSOR-ESSEX CATHOLIC
DISTRICT SCHOOL BOARD**

1325 California Avenue
Windsor, ON N9B 3Y6
CHAIRPERSON: Barbara Holland
DIRECTOR OF EDUCATION: Paul A. Picard

**SPECIAL BOARD MEETING
Thursday, May 17, 2012 at 6:30 p.m.
St. Anne High School
1200 Oakwood Dr., SS #3, Belle River, ON**

MINUTES

PRESENT

Trustees: F. Alexander B. Mastromattei
M. DiMenna, Vice-Chair J. McMahon
F. Favot L. Soulliere
B. Holland, Chair
J. Najem, Student Trustee
N. Tavares, Student Trustee
Rev. L. Brunet, Board Chaplain

Regrets: Trustee Courtney and Trustee Macri

Administration: P. Picard (Resource) P. Murray
J. Bumbacco C. Norris
P. Littlejohns J. Shea
E. Byrne M. Seguin

Recorder: B. Marshall

1. Call To Order - Chair Holland called the meeting to order at 6:40 p.m.
2. Opening Prayer - Fr. Brunet opened the meeting with a prayer.
3. Recording of Attendance - Trustee Courtney sent regrets due to a work commitment. Trustee Macri was not available this evening.
4. Approval of Agenda

Moved by Trustee DiMenna and seconded by Trustee Soulliere that the May 17, 2012 Regular Board meeting agenda be approved as amended. *Carried*

5. Disclosure of Interest - Pursuant to the Municipal Conflict of Interest Act.

Trustee Mastromattei disclosed interest in relation to agenda item 6a) Receive Input on Director's Report: Accommodation Review Study for the Lakeshore Area, including Our Lady of Annunciation and St. John the Evangelist Catholic Elementary Schools due to his daughter and daughter-in-law's employment and did not participate in the discussion or vote on any question raised on that item.

Trustee McMahon disclosed interest in relation to agenda item 6a) Receive Input on Director's Report: Accommodation Review Study for the Lakeshore Area, including Our Lady of Annunciation and St. John the Evangelist Catholic Elementary Schools due to his daughter, son and daughter-in-law's employment and did not participate in the discussion or vote on any question raised on that item.

6. Items:

- a. Report: Receive Input on Director's Report: Accommodation Review Study for the Lakeshore Area, including Our Lady of Annunciation and St. John the Evangelist Catholic Elementary Schools

Chair Holland reviewed the Accommodation Review Committee (ARC) development and process. She mentioned to date the ARC held four (4) public meetings which assisted the ARC in the development of the recommendations to the Director.

Director Picard commented on the non-occupied student space throughout the WECDSB system and the need to address the situation. Director Picard indicated committee representatives from both schools expressed concerns with transportation, programming, facility use, and boundaries which administration considered when preparing the Director's report.

Moved by Trustee DiMenna and seconded by Trustee Favot the Board receive as information the Director's Report on the accommodation review study for the Lakeshore area, including Our Lady of Annunciation and St. John the Evangelist Catholic Elementary schools;

and, that the Board receive public input concerning the Director's Report, and the matters that are addressed in it and in the Accommodation Review Committee's (ARC's) Report. Carried

7. Delegations:

- a. Delegations Regarding Items On the Agenda
- i) Parent, Maureen Weissenboeck, speaking on behalf of a group of concerned parents on the values of St. John the Evangelist Catholic Elementary school.
(supporting documents in the folder)

Mrs. Weissenboeck is a parent of a child who attends St. John the Evangelist Elementary school. Mrs. Weissenboeck provided supporting documents on the WECDSB School Climate Survey, Submission to the Standing Committee on Social Policy Re: Bill 177, and Rural Schools and Education Reform: Should We Keep Rural Schools Open? She cited figures and specifics from the above documents related to Value to the Student, Value to the Board, Value to the Community and Value to the local economy.

Mrs. Weissenboeck agrees with the Director's recommendation regarding a boundary review for St. John the Evangelist but suggest ,in order to effectively implement the review, extend the timeframe to additional four years. She also recommended a community use agreement with the Town of Lakeshore, to include a community centre within the school.

- ii) Parent, John Peltier to speak on the potential closing of St. John the Evangelist Catholic Elementary school and its affect on children with special needs.

Mr. Peltier provided examples of St. John the Evangelist staff and student initiatives provided for his child who has special needs. Mr. Peltier fears his child will not succeed but rather regress in a larger school atmosphere.

- iii) Paul Mullins to speak about boundary adjustments, population growth and community use of St. John the Evangelist Elementary school.

Mr. Mullins acknowledged and thanked the Board and administration for responding to the ARC recommendations. Mr. Mullins provided and addressed On the Ground Capacity/Enrolment figures for September 2012, St. John the Evangelist community use agreement with the Town of Lakesore, and comments regarding Full Day Early Learning at St. John the Evangelist, St. John the Baptist, and St. William. Mr. Mullins request the Board to modify the recommendation and proposed to extend the timeframe for an additional four (4) years to effectively adjust and implement boundary adjustments, community use agreements, and to further evaluate population growth.

- iv) Steve Chevalier to speak about the uniqueness of a small rural community school and Administration's recommendations with regards to St. John the Evangelist school.

Mr. Chevalier is a retired WECDSB teacher and lifelong resident of Woodslee. Mr. Chevalier commented on the benefits and values of a rural school in relation to the community and church. He questioned the financial savings projected if St. John the Evangelist closes and the possible financial risks if students transfer to the neighbouring public school.

- v) Parent, Holly Ralston to speak about the value of a small rural school especially for children with special needs.

Mrs. Ralston thanked the board for giving her the opportunity to speak. She mentioned Mr. Peltier inspired her to write a letter to Director Picard which she read to the board. The letter provided examples of her son's challenges and gains due to the caring and devoted team of teachers, support staff, and the Principal at St. John the Evangelist school.

- vi) Parent, Kirk Halliday to speak about the value of St. John the Evangelist Elementary school to the students, board, and community.

Mr. Halliday also thanked the Board for the opportunity to speak. Mr. Halliday expressed his concerns regarding longer bus rides for students resulting in lack of participation in after school activities, the connection with school, church and

community and suggested the following:

The Director's report be amended to reflect a timeline of five (5) years, a boundary review to balance school population to 90%, community engage in a community use agreement with the Town of Lakeshore to include a Library, option for parents outside of the St. John the Evangelist boundaries to enrol their children, and the establishment of a parent committee to promote enrolment within our county schools.

- vii) Parent, Suzanne Cammalleri to speak about the value of St. John the Evangelist Elementary school, submit updated petition results, review a letter received from the Ministry of Education regarding the petition and the benefits of rural schools.

Mrs. Cammalleri commented on her commitment to St. John the Evangelist school, church and community citing resources to encourage the Board to amend the recommendation.

- viii) Parent, Sara Broderick to speak about Our Lady of Annunciation Elementary school's continuing commitment to Catholic education.

Mrs. Broderick is the Catholic School Council Chairperson for Our Lady of Annunciation. Mrs. Broderick provided examples of Our Lady of Annunciation students participating in various church functions such masses, sacramental preparations, and student/community involvement. She mentioned the ARC members representing Annunciation agree with the Director's report.

- ix) Parent, Stacey Gagnier to speak about shared boundaries.

Mrs. Gagnier has a relative who attends Our Lady of Annunciation school. Mrs. Gagnier requested the Board and administration to review the boundaries to include all families on either side of the county roads and permit parents the opportunity to choose the school of their preference.

- x) Parent, Bev Vanier to speak about the benefits of a new rural school.

Mrs. Vanier's children attend Our Lady of Annunciation school and was a member of the ARC. Mrs. Vanier commented on the school's 100% capacity rate, the school's large geographical area to provide English Catholic education, and the recent enrolment of new families. She encouraged the Board to pursue a partnership with the French School Board to develop new combined elementary school and suggested a location for the new school to include daycare providers and a Parenting and Family Literacy Centre. Mrs. Vanier also agrees with the Director's report.

- xi) Parent, Karmel Brockman to speak about Our Lady of Annunciation Elementary school's value to the whole student.

Mrs. Brockman's child attends Our Lady of Annunciation school. Mrs. Brockman provided examples of Our Lady of Annunciation's staff commitment to student success through individualized teaching, recent student interactive activities, school masses and commented on the school's updated technology. Mrs. Brockman agrees with the Director's report.

- xii) Jody Percy Constituency Assistant, Taras Natyshak MPP mentioning that MPP Natyshak will continue to press the Minister of Education to review the funding formula, and to take into account the unique role that rural schools play in many small communities across the province.

Mr. Percy spoke on behalf of MPP Natyshak who encourages the communities to assist him to continue to contact the provincial government to review the funding formula for small rural schools.

- xiii) Rev. Dave Boutette, Pastor of St. John Evangelist Church to speak about the decision's impact on the possibilities for evangelization and the Catholic faith culture of the Woodslee community.

Fr. Boutette commented on the potential closing of St. John the Evangelist school and its impact on our Catholic faith, declining enrolment, Full Day Early Learning, proposed a review of boundary adjustments, and parish participation. Fr. Boutette encourages the Board to preserve the existing catholic culture by reconsidering the closing of St. John the Evangelist school.

Chair Holland requested comments from trustees. There were no comments.

Chair Holland mentioned there are many factors that the Board cannot control such as provincial funding and declining enrolment but the Board needs to be fiscally responsible while supporting Catholic education and the need for all children to have access to Catholic education. She thanked the presenters.

8. Closing Prayer – Fr. Brunet closed the meeting with a prayer.
9. Adjournment - There being no further business, the Regular Board meeting of May 17, 2012 adjourned at 8:40 p.m.

Approved

Barbara Holland
Board Chairperson

Paul A. Picard
Director of Education & Secretary of the Board

Good Evening Trustees and thank you for taking the time to host this meeting and listen to our concerns. My name is Maureen Weissenboeck, I am a parent of a student at St. John's. I am speaking on behalf of a group of concerned parents from St. John the Evangelist School. We have spent a great deal of time collaborating to present to you what we feel the Value of St. John the Evangelist School offers to the Student, to the School Board, to the Community and to the Local Economy as these Values are said to be at the forefront of the ARC decision making process. I am going to hand you our supporting documents, for you to peruse at your leisure:

1. The Windsor-Essex Catholic District School Board's "School Climate Survey" Results. Both the Board-Wide results and the St. John the Evangelist results.
2. Submission to the Standing Committee on Social Policy Re: Bill 177, the Student Achievement and School Board Governance Act, 2009
3. Rural Schools and Educational Reform: Should we Keep Rural Schools Open? A Review of the Literature, University of Guelph

VALUES OF ST JOHN THE EVANGELIST SCHOOL

VALUE TO THE STUDENT

- Integration of special needs students with other students fosters acceptance from their peers. We do this extremely well at SJE.
- Safety of students is of utmost importance, students are well known by families within our school, as we are a close knit community, everyone looks out for each other
- At St John the Evangelist our religion and faith are of the utmost importance. 53% of our students state they feel connected to their community by celebrating their faith. 53% may not seem like a large number, but only 30% of the rest of the board's respondents can say the same. This year, at Holy Names only 16 out of 35 kids (45%) are going on to Catholic secondary education, at St John the Baptist they report only 50% go on to a Catholic secondary school. We at St John the Evangelist are proud to say 13 of our 18 students (72%) are going on to a Catholic Secondary education. We don't want that number to change by sending them on to St John the Baptist where the majority of their new friends will go on to Belle River High School and not St Annes.
- According to the boards study Safe School Climate Survey -100% of the St John the Evangelist students reported never seeing drugs on school grounds (only 58% from the rest of the board schools) , 100% reported never seeing a weapon on school grounds (only 64% at other schools), 80% say they always feel safe at school (only 39% from other schools) , 100% say they are not concerned with gangs at our school (only 44% at other schools) and 80% are proud of their school (30% at other schools). Wow, can you imagine why we don't want to give up this amazing school in this amazing community? These percentages are different from what is reported at non rural schools. We as a community feel very confident sending our children to St John the Evangelist. We do not have any fears for their safety while they are in the hands of the St John the Evangelist

staff. We have every confidence that their safety and well being is looked after when they are at St John's and out of our care.

- St John's has ample acreage in the school yard to facilitate outdoor play and promote physical activity
- We are located on a quiet street, with low traffic
- Afterschool child care is provided on premises
- The children benefit from school parish being within walking distance of the school
- Sacramental prep is done between church and school
- Advantage of living in a rural community
- Less bullying and more acceptance in small rural schools. According to the Safe School Climate Survey, 73% of our students state they feel like they belong in our school compared to 41% from the rest of the board, 73% state they never bully each other while only 20% of the students from the rest of the board state the same, 67% state they have never been bullied while only 32% of other students report the same, and 73% say children with a visible disability in our school are never treated differently, while only 22% of the rest of the board population can state that.
- Parish hall is easily accessed for school luncheons and social events for the students and whole family.
- According to Bill 177, the Student Achievement and School Board Governance act 2009 "student well-being is the top goal of promoting student achievement". We at St John's strive for this on a regular basis. 93% of students report that the teachers expect them to do their best in all facets of school life. 67% of the students report feeling able to ask for help if they need it.

VALUE TO THE BOARD

- Majority of graduating students from SJE continue their religious education in the catholic system. We are concerned that our

children will not want to further their catholic education into high school at St John the Baptist. As stated above, we are at 72% compared to St John the Baptist's 50%.

- Low facility index ratio of 25.2% (1 year) and 33.6% (10 year)
- A Partnership with the Town of Lakeshore which encourages more municipal participation and joint use agreements to create community hubs would financially benefit the board while also benefitting the community.
- According to research published in 1997 Rural Schools and Educational Reform: Should we Keep Rural Schools Open? Page 6 , small rural schools have better attendance, increased enthusiasm for involvement in school activities, have higher grade averages and standardized scores, have lower dropout rates and have less problems with violence, security and drug abuse.

VALUE TO THE COMMUNITY

- Charitable donations to the community ^{to} Terry Fox Run, Canadian Cancer Society (letters to residents of the local nursing homes) ^{sent} Guatemala Hope, Essex and Lakeshore Food Bank. *As well as charitable good will with*
- New subdivision being built behind school (30 lots) allows for new children to come into the school. No school means residential house sales would be affected as people will not want their children to be bussed for long periods of time. Potential to lose children to the closer Public school.
- Outside agencies use gym on a regular rental basis.
- Evangelization *of* children, at risk with closing our school.
- We owe it to the rural communities to provide Catholic education that is accessible within our communities where ever possible.
- Encourage more municipal participation and joint use agreement to create community hubs. Partnering with the Millen Center who is currently

looking into expanding and building a new center would benefit both the board financially and the community we share.

- If we lose our school, we fear we will lose our church next. Church and school boundaries need to be the same to strengthen each other.

VALUE TO THE ECONOMY

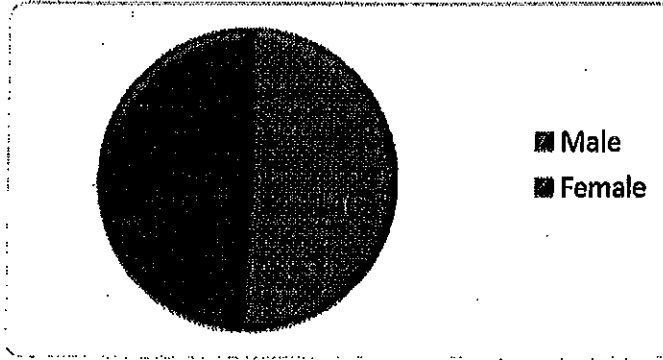
- Pizza days support local pizzeria
- Functions at church hall support local hall, parents frequent Jim Esso's and Mini Mart when dropping or picking their kids up at school.
- Latch key program offered by the YMCA.
- Woodslee Credit Union is where our school does all its banking.

In conclusion and summary, we agree with the Directors report regarding the boundary review for St John the Evangelist, but we need an additional 4 years along with the allotted one year, to be able to effectively implement a boundary review that increases our enrollment and ^{subsequently} ~~balance~~ enrollment and number of students at surrounding schools. We feel at a disadvantage, as it is difficult to recruit new families and thus students to our school, when there has been talk for the past year of closing our doors. Many young families with new JK's ^{Junior Kindergarten students} feared placing their child in our school, as they were not sure if we would be around in another year. They feared their child would have to go through the acclimatization process yet again, a year later. We also feel that along with an appropriate boundary change, another answer to allow our school to stay within our strong rural community of Woodslee would be a joint use agreement with the township of Lakeshore who is looking at funding a new community center to replace the Millen Center. Partnering with the township will not only benefit the board through the extra funding it would receive, the renovations to accommodate the Millen Center would

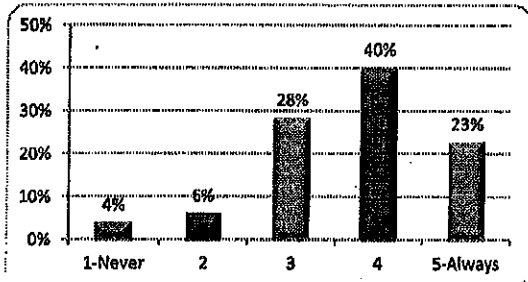
spill into the school and only improve the facility. By partnering with the township to build the Millen Center onto the school, also shows that the board values St John the Evangelist school and would only build a positive community relationship that would serve to attract students to an already vibrant and close knit community. We also do not want to see our 106 families displaced from our amazing school, church and community. We love St John the Evangelist and all it has to offer.

Thanks again for your time.

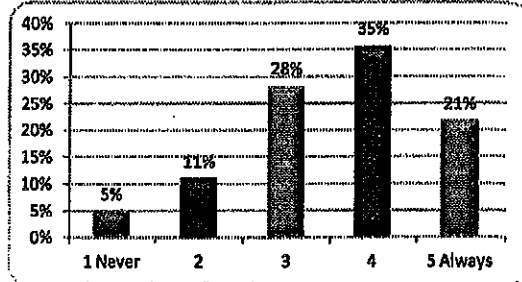
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2873 Total Students
BOARD WIDE RESULTS



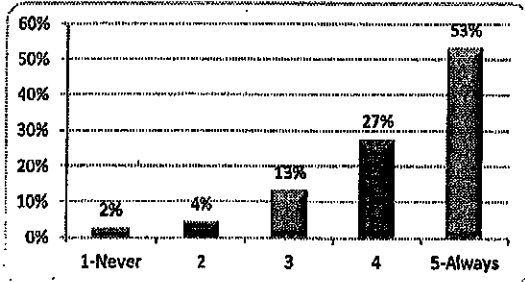
This school places more importance on cooperation rather than competition.



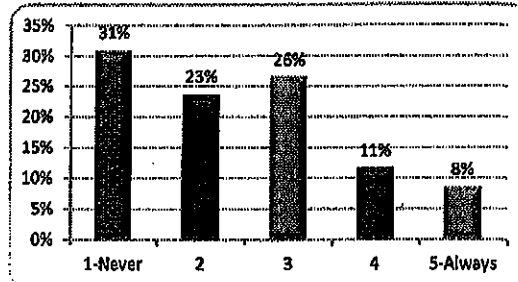
Teachers praise students when they do well in class.



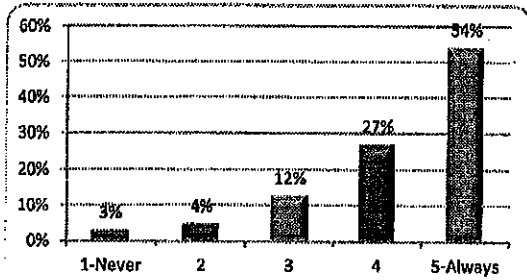
Students with special learning needs are honoured and respected by staff and students as essential members of the Catholic school community.



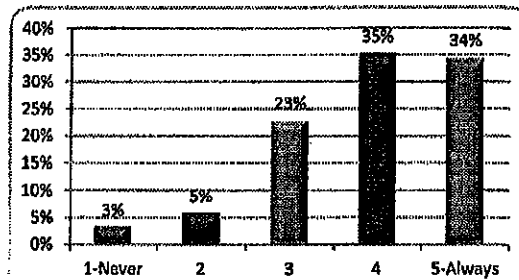
If I feel sad, I am worried about no one noticing.



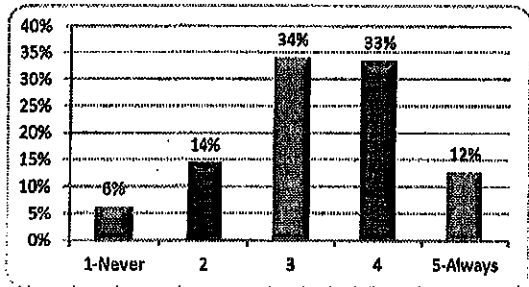
Students are encouraged to ask questions when they don't understand the material being taught.



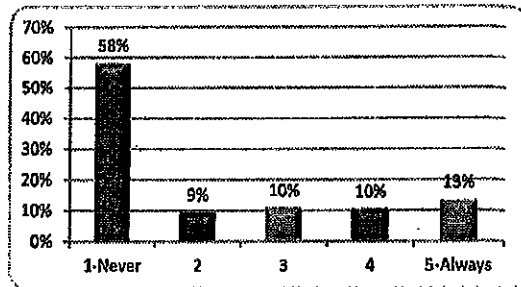
Students with special learning needs are involved in diverse educational programs at school.



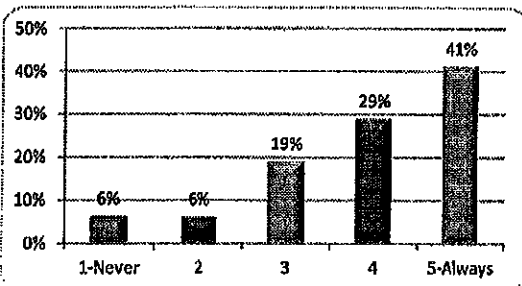
Students treat each other with respect and fairness



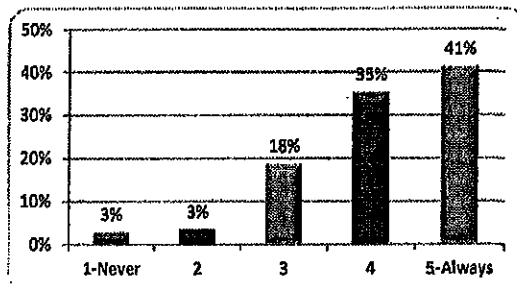
I have observed the use of drugs on school grounds.



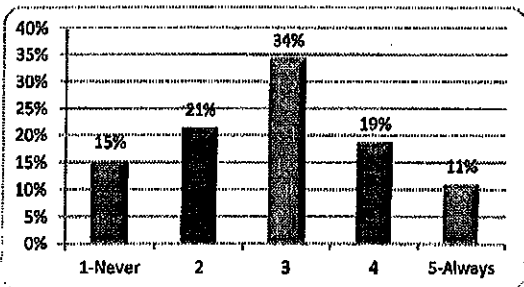
I feel like I belong at this school.



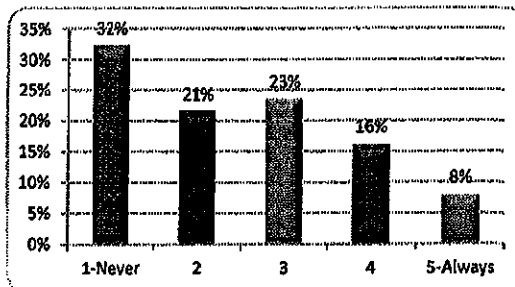
Teachers enforce class rules.



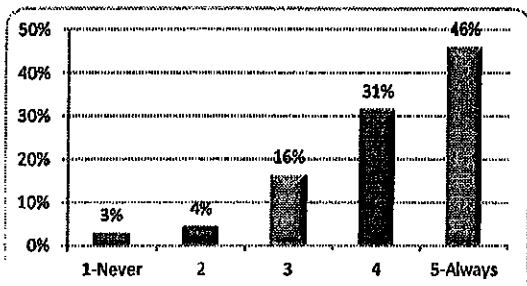
When I feel overwhelmed, I have difficulty coping.



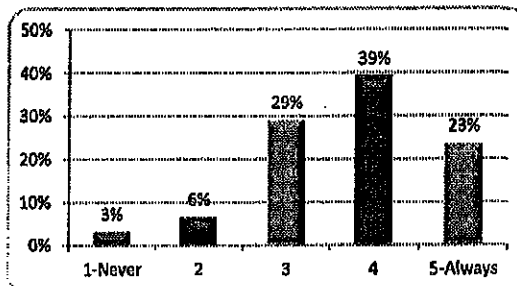
Students are given a say in the creation of school rules.



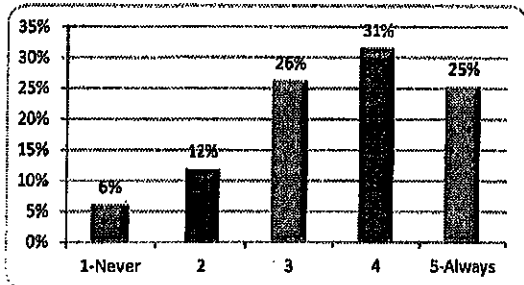
Students are motivated to do well in their classes.



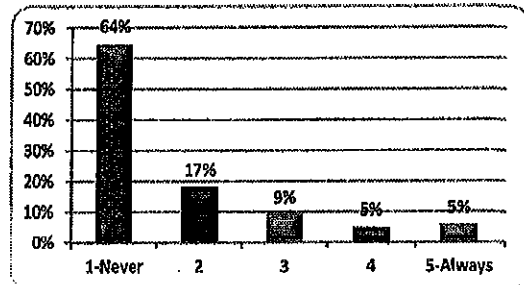
Class activities emphasize working together towards a specific goal.



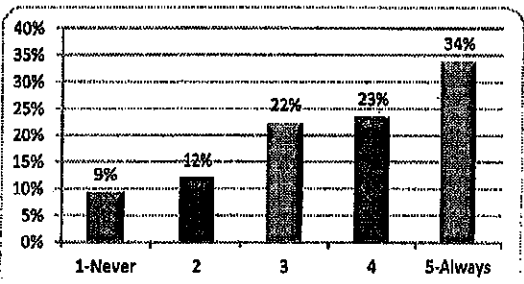
Teachers praise all students when they have worked hard on their schoolwork.



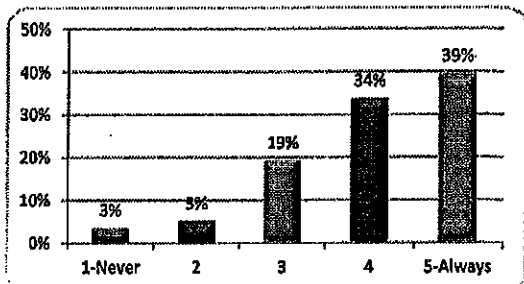
I have seen weapons at school.



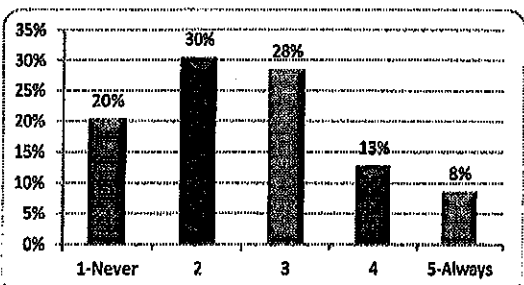
When I feel stressed, there are people and places at school I can turn to for help.



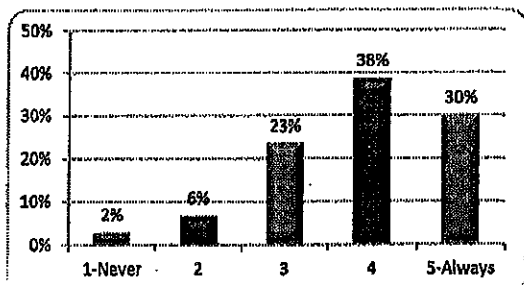
Students feel safe at school during the day and going to and from school.



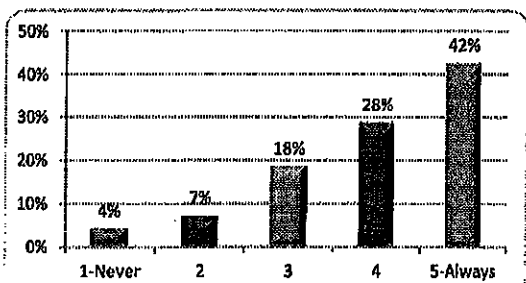
Students from different groups (i.e. cliques) bully each other.



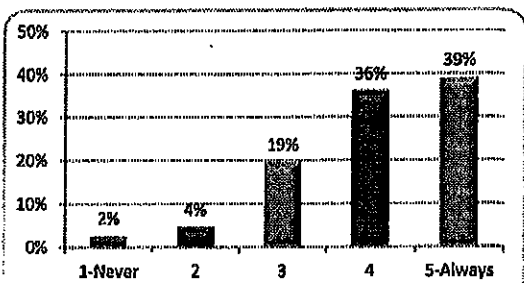
Students are given clear instructions about how to do their work in class.



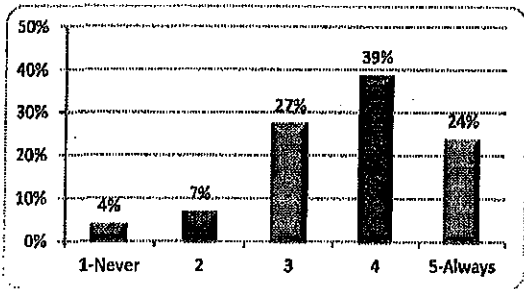
Students are able to ask for help if they have a problem with another student.



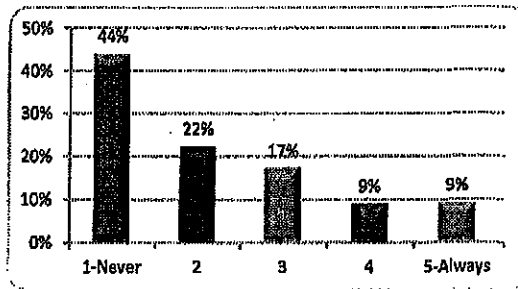
Students are interested in being involved in sports, clubs or other school activities.



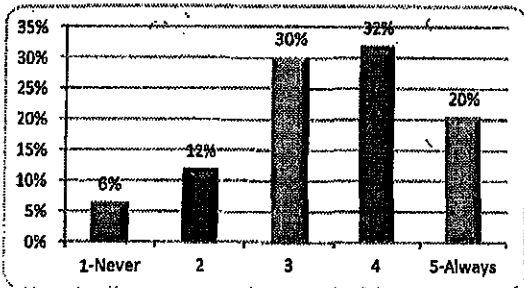
I have learned how to use positive strategies when I am in a difficult situation.



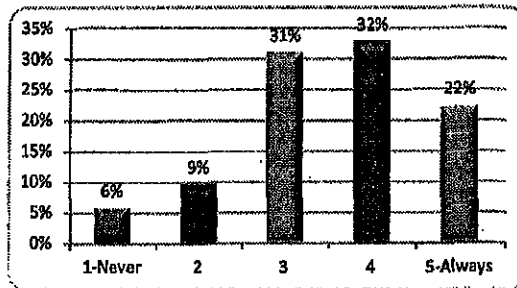
Students are concerned about gangs at school.



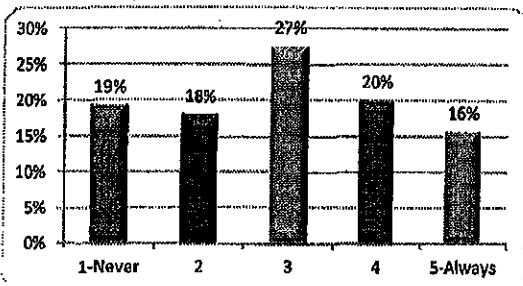
Students feel like they are an important part of the school.



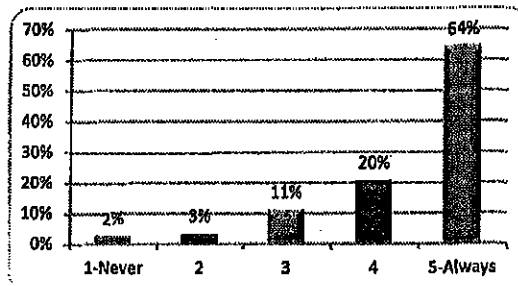
Teachers praise students who make a meaningful contribution to school life in non-academic areas such as being part of student council or running a school group.



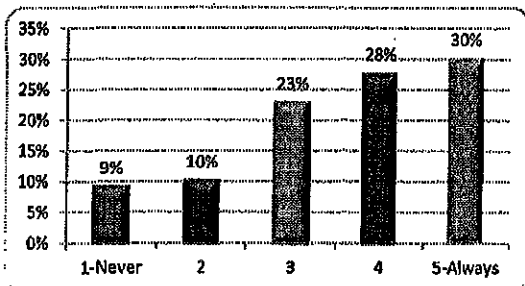
Teachers help me cope with stress and anxiety.



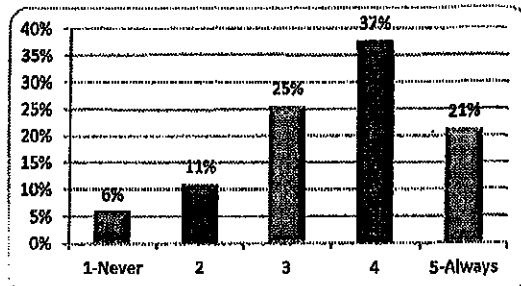
Teachers expect every student to do his/her very best.



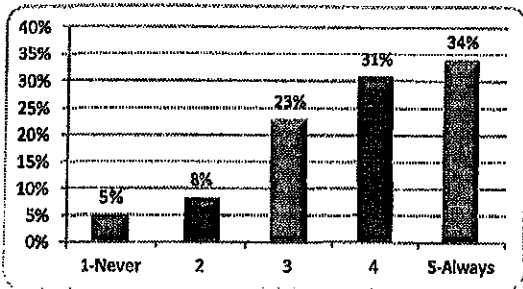
I feel connected to my community when we celebrate our faith.



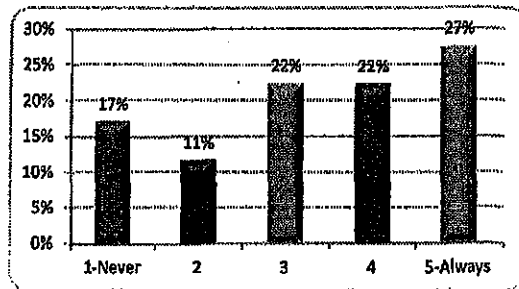
Teachers are available outside class time to help students with their school work.



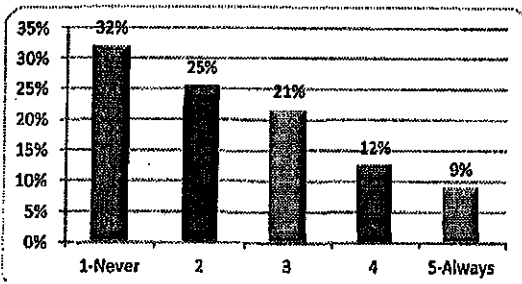
Teachers in this school treat students with respect and fairness.



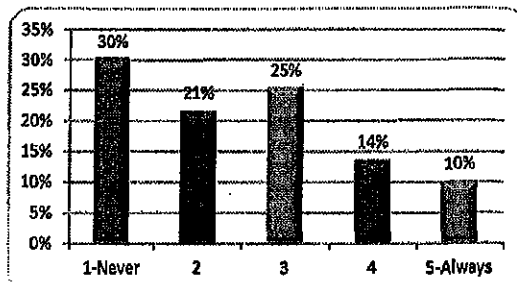
I feel comfortable talking to at least one teacher, guidance counselor or staff member about a personal problem (i.e. feeling depressed, stressed out.)



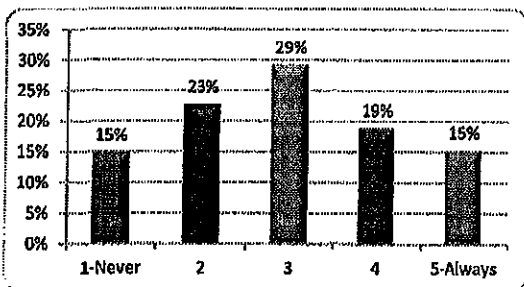
As a student, I have been bullied verbally, physically, socially or electronically.



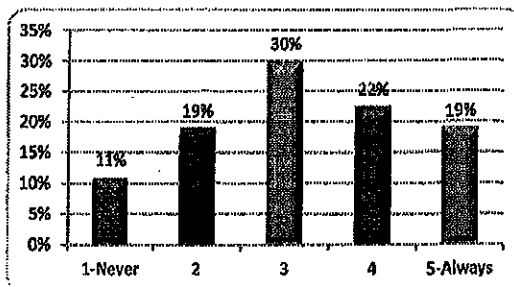
Some days, I have a difficult time going to school.



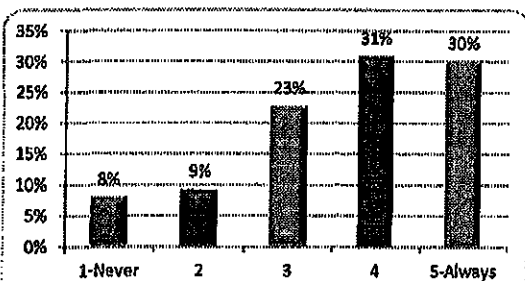
Students report bullying when observed.



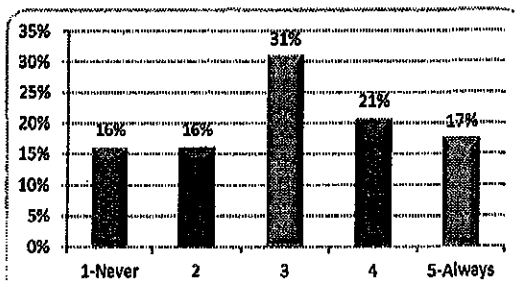
Students are comfortable telling a teacher or staff about potential violence.



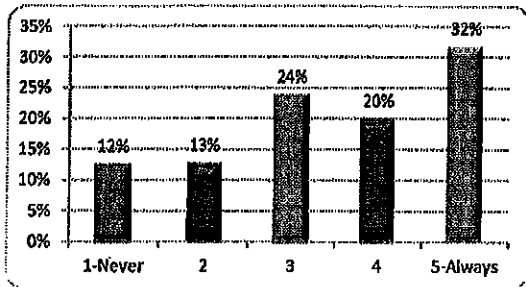
Students are proud of this school.



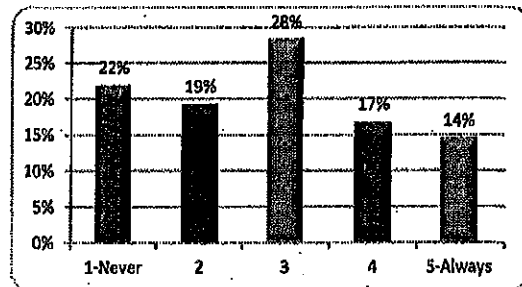
There is information available at school for people who struggle with addictions.



I can talk about problems at home with someone at school.

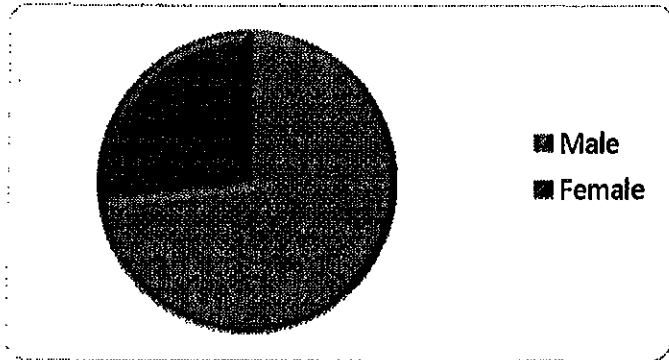


Students with visible disabilities in my school are treated differently.

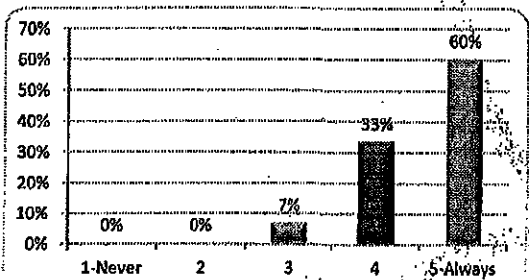


St. John the Evangelist

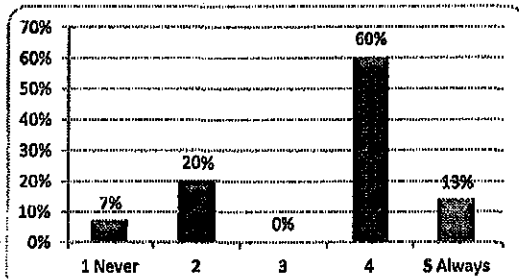
15 Total Students



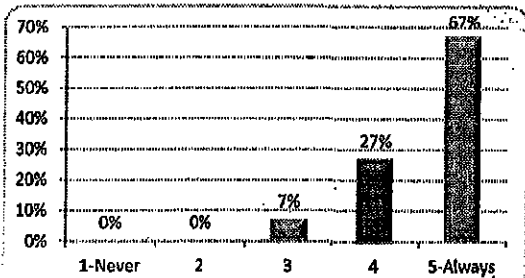
This school places more importance on cooperation rather than competition.



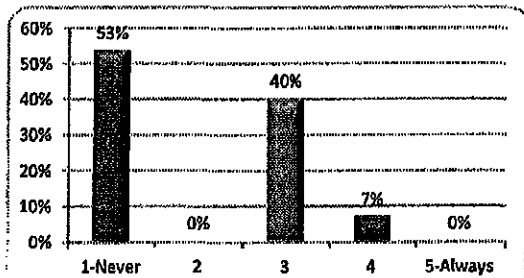
Teachers praise students when they do well in class.



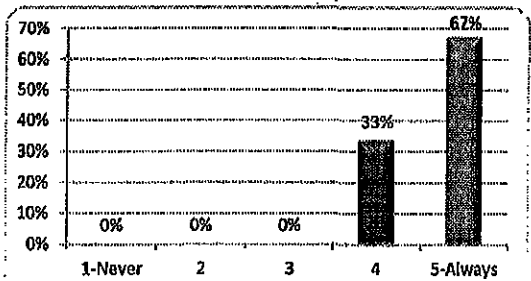
Students with special learning needs are honoured and respected by staff and students as essential members of the Catholic school community.



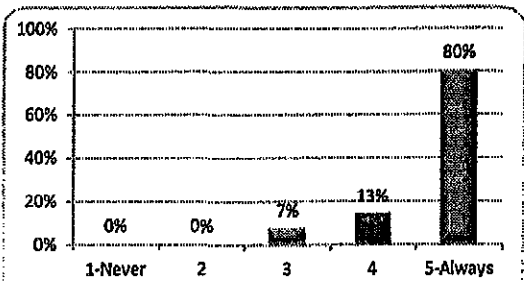
If I feel sad, I am worried about no one noticing.



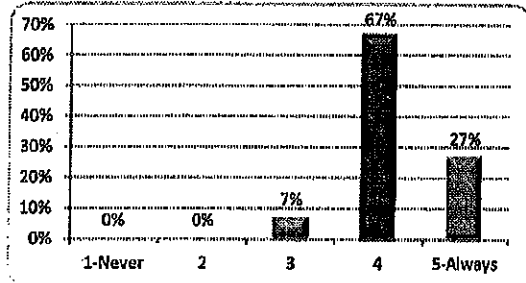
Students are encouraged to ask questions when they don't understand the material being taught.



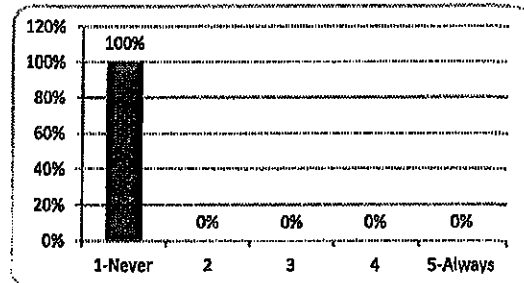
Students with special learning needs are involved in diverse educational programs at school.



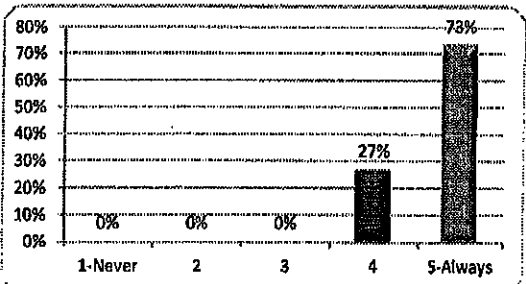
Students treat each other with respect and fairness



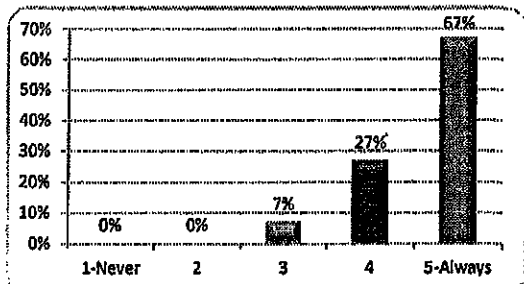
I have observed the use of drugs on school grounds.



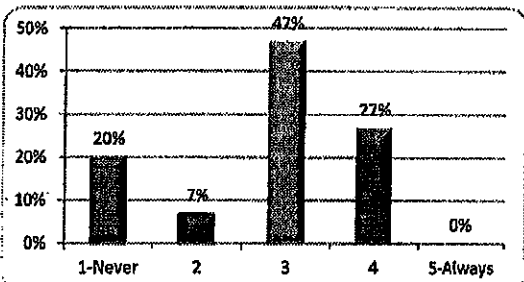
I feel like I belong at this school.



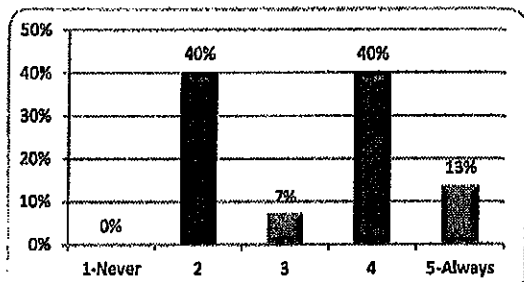
Teachers enforce class rules.



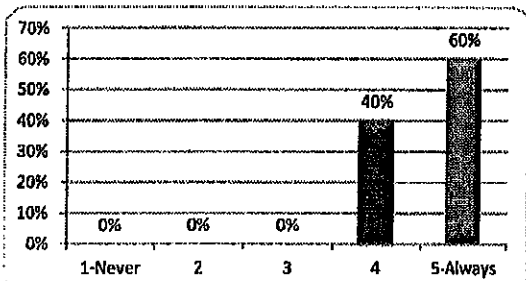
When I feel overwhelmed, I have difficulty coping.



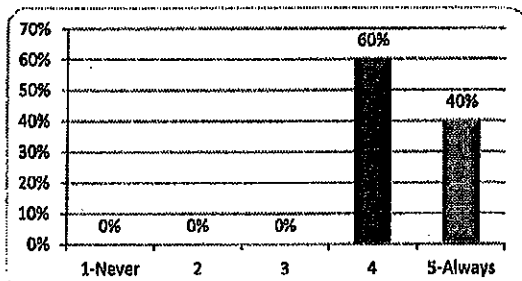
Students are given a say in the creation of school rules.



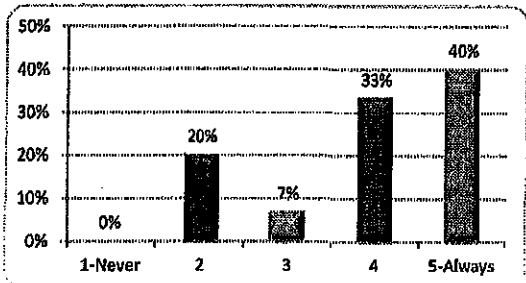
Students are motivated to do well in their classes.



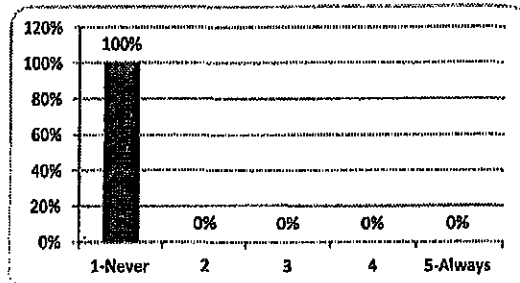
Class activities emphasize working together towards a specific goal.



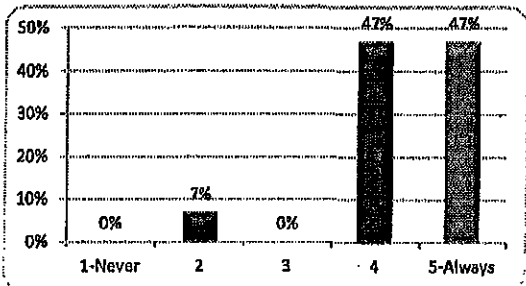
Teachers praise all students when they have worked hard on their schoolwork.



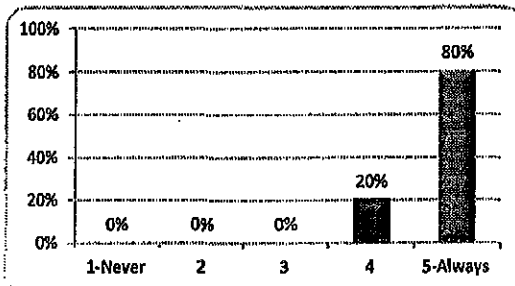
I have seen weapons at school.



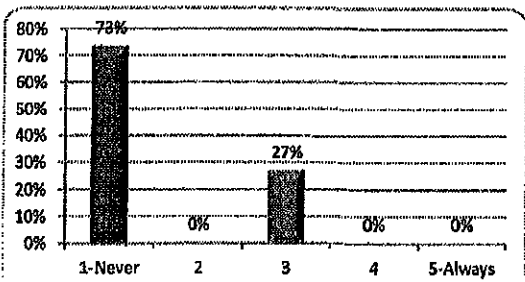
When I feel stressed, there are people and places at school I can turn to for help.



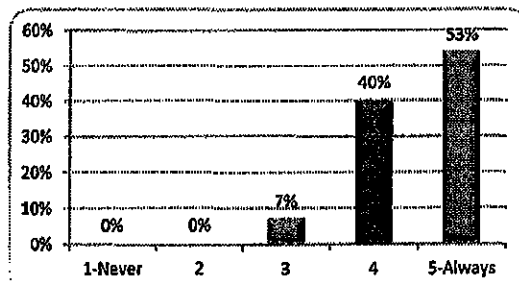
Students feel safe at school during the day and going to and from school.



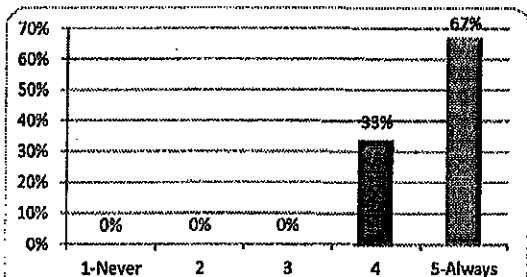
Students from different groups (i.e. cliques) bully each other.



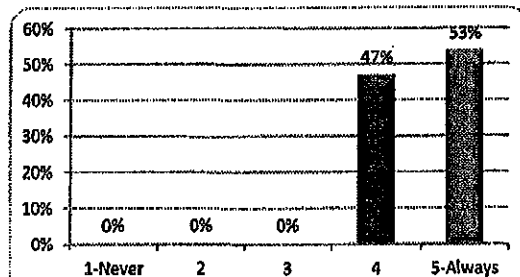
Students are given clear instructions about how to do their work in class.



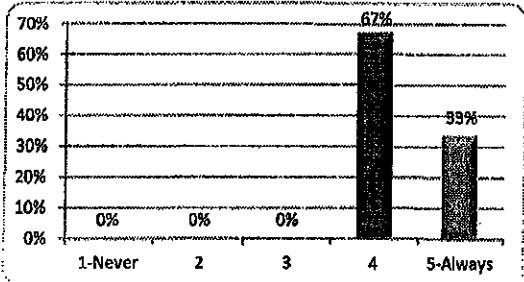
Students are able to ask for help if they have a problem with another student.



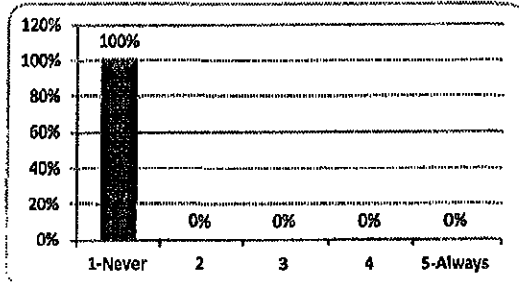
Students are interested in being involved in sports, clubs or other school activities.



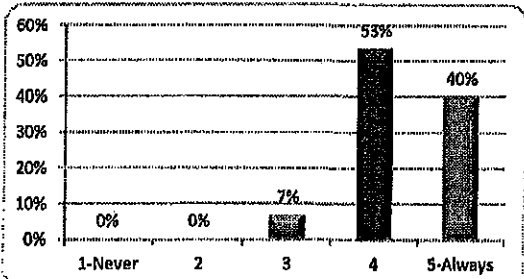
I have learned how to use positive strategies when I am in a difficult situation.



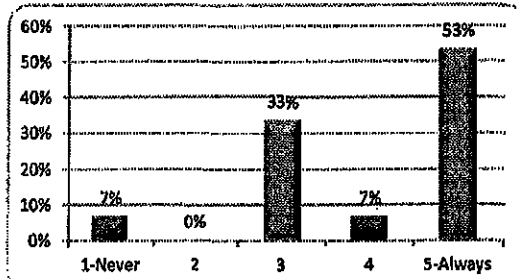
Students are concerned about gangs at school.



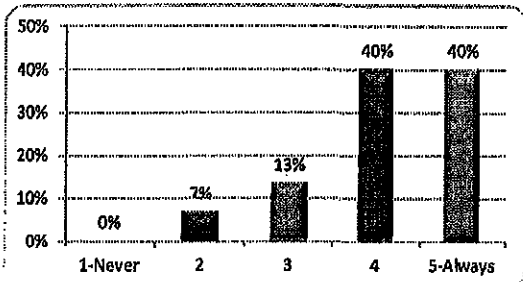
Students feel like they are an important part of the school.



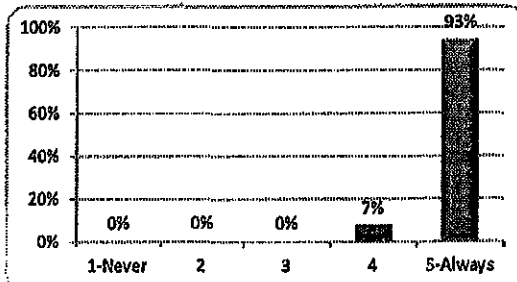
Teachers praise students who make a meaningful contribution to school life in non-academic areas such as being part of student council or running a school group.



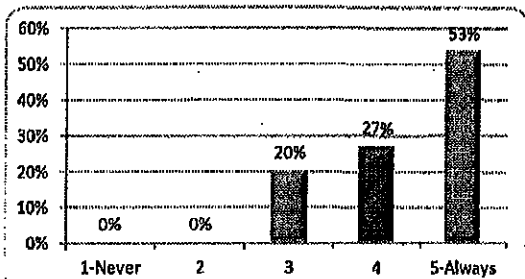
Teachers help me cope with stress and anxiety.



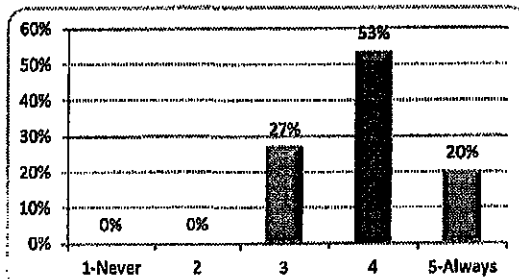
Teachers expect every student to do his/her very best.



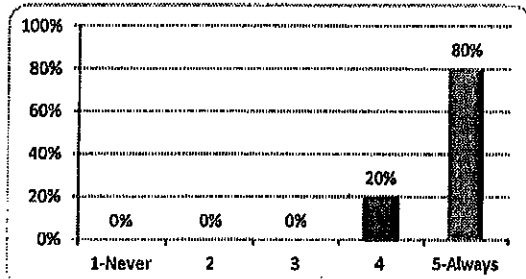
I feel connected to my community when we celebrate our faith.



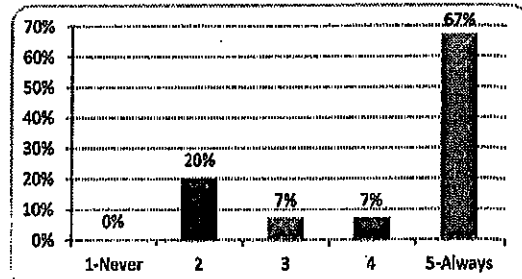
Teachers are available outside class time to help students with their school work.



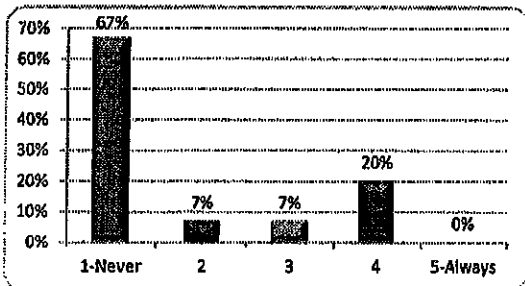
Teachers in this school treat students with respect and fairness.



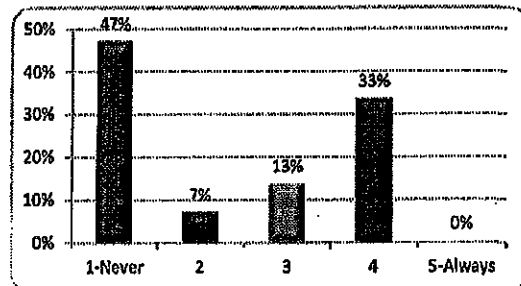
I feel comfortable talking to at least one teacher, guidance counselor or staff member about a personal problem (i.e. feeling depressed, stressed out.)



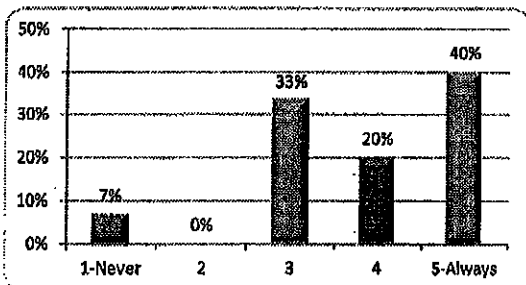
As a student, I have been bullied verbally, physically, socially or electronically.



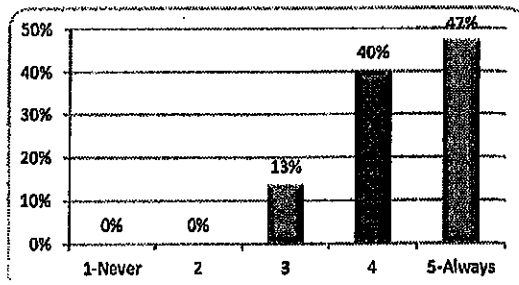
Some days, I have a difficult time going to school.



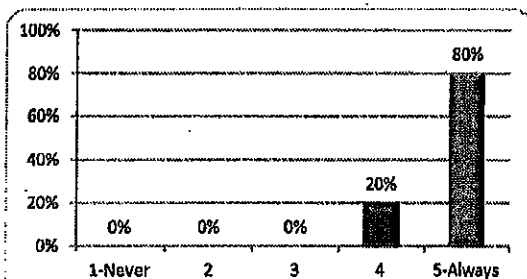
Students report bullying when observed.



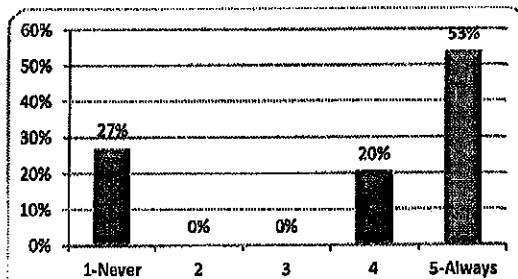
Students are comfortable telling a teacher or staff about potential violence.



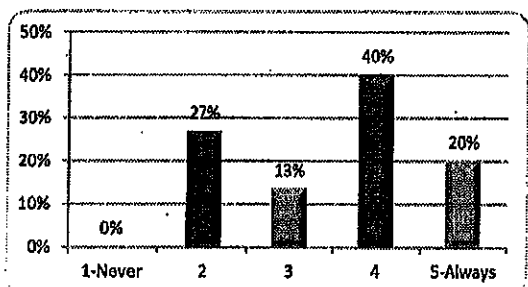
Students are proud of this school.



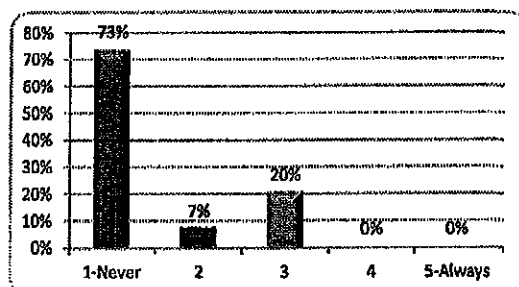
There is information available at school for people who struggle with addictions.



I can talk about problems at home with someone at school.



Students with visible disabilities in my school are treated differently.



Submission to the Standing Committee on Social Policy

Re: Bill 177, the *Student Achievement and
School Board Governance Act, 2009*

October 2009



Elementary Teachers' Federation of Ontario
Fédération des enseignantes et des enseignants de l'élémentaire de l'Ontario
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Telephone: 416-862-3836 Toll free: 1-888-838-3836
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Bill 177, the *Student Achievement and School Board Governance Act, 2009* is part of a long continuum of Ontario government reviews of local education governance. This legislation, through the significant regulatory power it proposes for defining key aspects of local education governance, could lead to radical changes to the role of local school boards and the viability of local democracy in education. The Elementary Teachers' Federation of Ontario (ETFO) is pleased to participate in the review of the bill.

PURPOSE OF EDUCATION

Bill 177 proposes to add two statements to the *Education Act* to clearly articulate the general purpose of Ontario's public education system.

The first stated purpose -- "to provide students with the opportunity to realize their potential and develop into highly skilled, knowledgeable, caring citizens who contribute to their society" -- articulated in the proposed new section 0.1 (1), is a laudable one. ETFO will rely on this definition to make a case for more resources to support elementary education and for less emphasis on standardized tests which narrow the focus of student learning in Ontario. Students won't realize their potential if they don't have a well-rounded, well-resourced elementary education.

The second stated purpose, outlined in the proposed new section 0.1 (2), commits all partners in education to: enhancing student achievement and well-being, closing gaps in student achievement, and maintaining public confidence in the public education system. There is no definition of "student achievement" in Bill 177 or the *Education Act*. The definition is being left to future regulations. This purpose therefore raises concerns regarding how the bill will be used to further entrench the Ministry's focus on province-wide testing that, in the federation's view, skews elementary teaching too much in favour of basic skills and away from promoting a balanced curriculum and fostering a broad knowledge base, key critical thinking skills, and enthusiasm for learning among our students.

~~Bill 177 goes beyond the stated objectives outlined in the Ministry's 2008 vision~~
document, *Reach Every Student: Energizing Ontario Education*, by adding "student well-being" to the top goal of promoting "student achievement." In the face of the current Ministry obsession with data-driven initiatives linked to EQAO test scores, however, we are concerned that the focus on narrow student outcomes will supersede the broader issue of student well-being.

CLARIFYING ROLES OF SCHOOL BOARDS

Much of the bill consists of amending or adding to the current regulatory framework that governs the operation of school boards. Section 4 of the bill proposes to extend the government's extensive regulatory powers to more clearly define the roles, responsibilities, and powers of school boards and individual trustees, board chairs,

and directors of education. While the intent to provide clarity in this area of education governance appears reasonable, it is important not to redefine roles and responsibilities at the local level to the point at which school boards no longer function as effective democratic bodies accountable to their electors.

Earlier this year, during the consultation conducted by the Governance Review Committee, the Ministry of Education raised issues related to the key roles at the school board level, including whether directors of education should have "dual responsibility" to both the elected trustees and the Minister of Education and whether school trustees' responsibilities should be limited to general policy issues rather than more specific operational and program issues. Bill 177 doesn't answer these questions. If, through regulations, the government imposes a so-called "policy" model on school boards and makes directors of education directly accountable to the provincial government as well as school boards, then school boards will lose the last vestiges of any independent authority they have.

Given the Province's control over funding and the expansion of Ministry-directed initiatives, directors' responsibility to the Province will undoubtedly trump their accountability to local trustees. School boards stand to become local offices of the Ministry of Education rather than local governing bodies responsible to their electors.

Duty of School Boards

Bill 177 proposes to add a comprehensive new section in the *Act* (Section 169.1) that specifies school boards' responsibilities to "promote student outcomes" and to develop multi-year plans that "include measures respecting the allocation of resources to improve student outcomes." The outcomes are to be defined in a future public interest regulation as allowed by Section 11.1 of the *Act*. While this regulation is not yet finalized, it appears that the primary focus will be on the narrow achievement indicators measured by EQAO literacy and numeracy tests.

Through its recent consultation regarding the public interest regulation, the Ministry clearly indicated its intention to use the new regulation to expand its authority to take over the supervision of a school board to address issues beyond financial ones. The Ministry sought input for what the "triggers" should be for the government to step in to assume control over a board. The consultation document suggested an example of such a trigger as being "where a board has 40% or more of its schools in the bottom 20% of the schools in the province, based on EQAO Grades 3 and 6 scores in reading, writing and math." More specifically, the Ministry consultation document states:

"The purpose of the proposed regulation is to address those rare instances where a school board is struggling and, despite supports from the Ministry, is failing to make progress or is declining in student achievement."

Other proposed triggers include the credit accumulation at the secondary level, the rate of student suspensions, and the number of meetings a board holds with its

Parent Involvement Committee. The consultation paper acknowledged that the fewer the triggers, "the more the regulation is forced to rely on EQAO results and credit accumulation."

Since school boards no longer have the ability to raise revenue through local taxation and are totally dependent on provincial funding, they are legitimately concerned that they will be held accountable for "student outcomes" without having the means to address issues that may require additional financial resources or involve a broader approach to student learning. This concern is heightened in the current context of economic restraint.

The present government insists that the power to take over a school board regarding student achievement levels will only be invoked in rare circumstances. But governments come and go and courts rule on the language of statutes and their regulations, not the reputed intent. ETFO does not support the government's intention to issue a public interest regulation that gives it the authority to take over supervision of a school board beyond the current ability related to school boards' failure to operate within a balanced budget.

Like other provisions of the bill which focus on student achievement, the new Section 169 raises concerns that school boards are going to be set up for increasing Ministry of Education control over one aspect of student education: EQAO tests.

CODE OF CONDUCT

Section 26 of Bill 177 adds new sections to the Act (Sections 218.1, 218.2, and 218.3) to legislate terms and conditions for implementing a standardized code of conduct for school trustees. While the intent of providing a coherent framework for trustee conduct is laudable, the federation has concerns with Subsection 218.1 (d) which obliges individual trustees not to be publicly critical of a board resolution. This provision could unfairly interfere with trustees' ability to provide a dissenting voice and fairly represent the views of their electors. Such a limitation could be seen as conflicting with trustees' rights to freedom of opinion and expression.

ESTABLISHMENT OF PARENT INVOLVEMENT COMMITTEES

Over the last two decades, different governments have experimented with various attempts at establishing a parent advisory group at the provincial level. The current minister has moved away from having a provincial advisory group and has focused, instead, on fostering greater parental engagement at the local board and school levels where parental involvement can have the most effect.

ETFO supports the move to disband the latest version of a provincial parent advisory council. The stand-alone parent council created unrealistic expectations for those appointed to the body and raised issues related to the extent to which these appointees could indeed be representative or indeed even reflective of parents' diverse concerns and views. Parents' voices are well-represented at the Minister of

Education's Partnership Table through a number of provincial, member-based organizations.

School councils have been mandated for publicly-funded elementary and secondary schools since 1997. The level of parental involvement in these councils varies from school to school. Bill 177, through a new Section 17.1, proposes to give the government the regulatory power to require advisory parent engagement committees at the school board level. Time will tell whether these committees are any more successful than existing school councils and individual schools in fostering broader parental engagement in education. The establishment of the Parent Engagement Office and recent parent engagement grants are recent Ministry initiatives that should help foster gains in this area.

PROFESSIONAL ACTIVITY DAYS

The previous Conservative government cancelled five of teachers' nine Professional Activity Days. Recently, the current government restored two of those PA days and prescribed guidelines for their use through an amended Regulation 304 under the *Education Act*. Bill 177, through a new paragraph added to subsection 8 (1) of the Act, proposes to replace the current regulatory vehicle for issuing guidelines for these two PA days with Ministry authority to issue policies and guidelines. ETFO appreciates that this provision gives the Ministry more flexibility to change the focus of the two Ministry-prescribed PA days. The federation supports the change as long

as the focus of the remaining four PA days is left to school boards and teachers to determine.

CO-INSTRUCTIONAL ACTIVITIES

Bill 177 expunges all reference to "co-instructional activities" from the *Education Act*. Specifically, the bill repeals the definition of co-instructional activities and the responsibility of school boards and principals to have plans for co-instructional activities. It also deletes any reference to the withdrawal of co-instructional activities from the definition of what constitutes a strike on the part of teachers.

These changes, which remove amendments to the Act introduced by the previous Conservative government, reflect the philosophy that co-instructional activities provided by teachers are entirely voluntary in nature and, as such, should not be subject to governance by provincial legislation. ETFO supports these amendments to the Act.

CONCLUSION

Given the degree to which the intent of Bill 177 will be operationalized through future regulations, it is difficult to propose specific amendments to the legislation. Because of the reliance on regulatory change, Bill 177 means that potentially radical changes to school board governance could be determined outside of the more transparent and accountable legislative process. ETFO would prefer to see changes to the role and definition of school boards, trustees, and directors dealt with through

amendments to the Act. ETFO does not support the government's plan, through the proposed public interest regulation, to expand the government's current authority to take over supervision of a school board.

VM:

**Rural Schools and Educational Reform:
Should We Keep Rural Schools Open?
A Review of the Literature**

**Prepared by
Dr. Allan C. Lauzon and Ms. Danielle Leahy
School of Rural Extension Studies
University of Guelph
Guelph, Ont.
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This research was funded by OMAFRA under the SRC Research Program, Project 023450

Introduction

Rural school closure is not new. Educational reform in the Canadian context has been characterized by a continual process of reform and consolidation since its inception as a public service. Originally, in the earliest days of public education in Canada, the structure for school governance was quite simple. According to Gallagher (1995), schools were an essential element of the social and cultural fabric of community life. People, even those who did not have school age children, were still close to the school and in many ways part of school life. Organizationally, schools were governed by a board of elected trustees whose job was to govern and manage the local school, ensuring that it adhered to the provincial guidelines. Typically, each community had one school and one board of trustees, except for those larger urban communities where one board of trustees might be responsible for the governance and management of several community schools (Gallagher, 1995). While this structure served both children and communities well, school does not operate independent of the larger social and economic forces. At the end of World War II Canada was increasingly becoming urbanized and consequently patterns of schooling and school board activities changed. It is during these years that education is radically altered through its professionalization. The increasing use or need for professional managers in education leads to undermining any sense of community ownership. Furthermore, with education becoming professionalized there are further changes in governance with school boards moving from being local to regional. The consequence, according to Gallagher (1995: 67) was that "Schools were now more distant, in many respects, from many of the community members whose children they were intended to serve." Also during this period the cost of education increased. Some communities, unable to raise sufficient funds to cover the cost of education, became dependent upon provincial grants in an attempt to ensure educational equity. Subsequently, community members become even more detached from schooling and there was a rapid decline in commitment to education, causing a rift between those who have children and those who do not. Gallagher (1995) argues that the consequence was further marginalization of parents and community members from the educational process and the school. Howley (1997: 2) characterizes education during this period as "part of the march of progress toward an inevitably better future - a progressive, postwar and increasing post-rural future." Between 1971 and 1991 there was a significant growth in the number of teachers and administrators employed as the professionalization of education continues. In response to the further estrangement of parents and community members from schools, there were attempts made to involve lay constituencies in education. However, despite the collaborative rhetoric, community members still remained passive spectators to the educational enterprise. Gallagher (1995: 69), in summarizing this period of education, concludes that

What had been community-based schools became the domain of hired, professional, expert teachers and administrators, and of school trustees whose personal agendas often went well beyond the establishment of school policy.

What had once been a community based and supported enterprise had been transformed into a professional activity where those who had the greatest interest - parents of children - had the least power or authority to play an active role in the educational enterprise.

Recently we have once again embarked on another round of reform and consolidation of education in Canada. In a time of increased need for economic efficiency in order to combat provincial deficits, Canadian provinces have turned to the idea that by increasing the size of administrative units within education a savings can be created while at the same time providing

an education of greater quality (Gallagher, 1995). Many of these changes, according to McEwen (1995), are being driven by demands for greater accountability, with a particular emphasis on economic performance. Much of this can be attributed to the effects of economic globalization (McMurtry, 1998) and the fact that education is increasingly influenced by the business community (Levine, 1999). Education has become, according to Howley (1997), the handmaiden to economic globalization and this is actively undermining the vitality of rural communities. Part of this can be understood as part of an agenda for global changes as a result of economic globalization, and this impacts negatively on rural communities and rural life (Lauzon and Hagglund, 1998). Miller captures the essence of this when he writes that

Many rural communities now face a decline in their quality of life due to the 1980s economic downturn and the 1990s globalization of the marketplace. Businesses have closed and many young well-educated citizens have left for urban areas. Additionally, social services, including schools, have been regionalized or consolidated as cost-cutting measures. These trends have led to high levels of unemployment and the deterioration of rural economic, social and environmental well-being (1995: 1).

Miller (1995) further states that in response to these changes there is a misguided belief that the focus of community development should be on economic development. However, in the absence of looking after the social fabric of the community, and ensuring the integrity of the biophysical basis of community, it is unlikely that any advances in economic development will be sustainable. As Hay and Barasan (1992) note, the very nature and fabric of rural communities is being altered and the problems of this are further exacerbated by the fact that "rural" is seldom a dimension considered in the formulation of national or provincial policy. As Pinder (1994) notes there is an implicit bias in policy formulation that actively excludes the consideration of the unique characteristics, qualities and needs of rural community life.

From an education perspective, this has the potential to be disastrous for rural communities. First, consolidation of boards and schools is often skewed in favor of urban values and the needs of larger communities (Burlingame, 1979; Sher, 1981; Brown, 1996; Ribchester and Edwards, 1999). Second, as Howley (1997) argues, a different logic is needed in considering rural schooling if the development of these institutions are to actually benefit rural communities. Again, this points to the need to consider the unique context of rural communities and the impact that restructuring or consolidation has on the quality of rural life. Howley (1997) further argues that in general, there is a scepticism that rural school needs are different. This, he maintains, is a result of three assumptions. First, the very notion of the school is problematic. He argues that the concept of school is based upon the platonic ideal of what a school should be and subsequently all schools are, by definition, lacking. This is closely tied to his second reason and that is that in general, in a highly urbanized culture, there is a general disregard for rural places and their diversity. Subsequently, they are not important, and hence not considered. Third, research in education promotes universal themes and recommendations across differing contexts, hence "ruralness" is rarely considered a variable in the context of educational research. This he notes mean that often educational researchers fail to ask the right questions if they wish to understand rural education and the implications consolidation may have for rural communities. Furthermore, if the research community does not ask the right questions and policy makers draw upon the research community to inform policy development, then rural, as a variable, will be left out of

the policy development agenda.

The remainder of this literature review will examine empirical literature as it relates to the issues of rural school closure and board consolidation.

The Economics of Educational Reform and Consolidation

Since the inception of public education the trend in educational reform has been toward larger schools and boards (Sher, 1979; De Young, 1991; Brown, 1996, 1999; Ministry of Education and Training, 1996). This trend is indebted to an organizational model that is rooted in the 19th century model of industrial production that is based upon economies of scale (Fanning, 1995). Simply stated, economies of scale refers to the ability to reduce production costs by increasing the scale of the operation, thus reducing the production cost of each unit without incurring a decline in product quality. By borrowing this production model, administrators and politicians believe they can lower the costs of education while maintaining a quality education, just as industrialists have reduced costs without suffering any change in the quality of their product. This has been the driving force in much of the educational reform and consolidation over the history of public education in Canada. Furthermore, the public, in general, has historically accepted this argument without demanding that administrators actually demonstrate the cost savings. For example, there was very little public outcry as a result of the closures that took place in the 1960s and 1970s. There were a variety of reasons for this. First, it was assumed that "bigger is better" and the transfer of students from small schools to larger schools would afford them greater educational opportunity and provide them with an education of greater quality and value (Sher, 1977). Furthermore, the professionalization of education that happened during the post war period was still dominating whereby lay people would not challenge the expert; they invested significant trust in professionals and assumed that any action they advised would be beneficial for their children. Despite the trust of the sixties and seventies, and the cynicism that has emerged in the eighties and nineties, the question still needs to be asked: Does this organizational model translate across contexts (industrial production to education), and is there empirical evidence for the alleged benefits? For the purposes of this section we will only explore alleged benefits in terms of cost savings. Pedagogical outcomes and opportunities will be explored in the next section.

First, there are two areas to potentially save money through the application of this type of organizational model and the associated savings as a result of economies of scale. They are teachers salaries and administration costs (Giessen, 1998). First, is there a savings associated with teacher salaries? Giessen (1998), in exploring this issue, argues that there is a ceiling on the savings that can be realized as a result of school consolidation if teacher student ratios are increased. For example, rural schools may only have a small number of students and hence their teacher/student ratio is low and costs high on a per pupil basis. If these students can be assimilated into a larger system without having to increase staffing there will be a savings. However, assuming that there is maximum ceiling on class size, for example of 30 student per class, then the 31st student means that a new teacher would have to be hired and this begins to cancel out the savings. The question is can a savings be realized through closing rural schools and re-locating the students to larger schools? The answer is it depends on the circumstances of consolidation, the number of students being moved, and the number of students currently enrolled in the school that will receive them. There will be a savings if students are re-located to a school in which no or few additional teachers will need to be added and still retain acceptable student/teacher ratios. For each teacher that needs to be added the actual savings will decline. For

example, in West Virginia more than 25% of its schools were closed yet it still has the same teacher/student ratio in 1995 as it did in 1990. In other words there was no savings with regard to teacher salaries as a result of consolidation. The savings that arise as a result of reduced teacher salary costs is, at best, open for debate and not in anyway definitive.

The second area for potential savings was a reduction of administrative costs. Assuming fewer schools means assuming fewer administrators, and hence a savings. However, again the research findings are ambiguous as to whether there is actually any savings. Marshall (1988) found that after consolidation administration costs were reduced as a percentage of the budget but the actual costs increased. Nachtigal (1992) found that the number of administrative staff actually increased as a result of the greater bureaucratic demands of the consolidated system. While there may be a savings in some cases, like the savings associated with teacher's salaries, it will be dependent upon the specific context. Furthermore, Monk (quoted in Witham, 1997) found that after a secondary school population reached 400 students any savings due to the elimination of small classes is exhausted. Geissen has argued that 400 - 499 pupils is the optimal size for economic efficiency and that after this level is reached costs start to rise. For example, according to Geissen, schools of 800 or more pupils are as expensive to run as those with 200-299 students. De Young and Howey (1990) have noted that almost all jurisdictions that force consolidation of small rural schools have failed to document or evaluate the improvements that are alleged to result from these school closures. The financial gains may be difficult to establish. Furthermore, school closures often mean only slight savings because the vast majority of a school budget is for personnel costs (Howley, 1997; Purdy, 1997; Brown, 1998). An argument can be made for administrative savings, however, as stated previously, often there is a significant increase in the bureaucratic structure required to run a large educational system, negating any savings (Irmsher, 1997). In fact, there may in fact be diseconomies of scale as a result of an increase of in the number of staff needed to meet the demands of a bureaucratic system. Brown (1996) argues that add to this the increased costs of transportation and any savings is significantly decreased if not eliminated.

Irmsher (1997) makes a very interesting point, arguing that in order to understand any cost-savings you must understand how the numbers are calculated. For example, in examining high schools she states

Standard operating costs are usually computed by dividing the total amount spent by the number of students enrolled. But when cost-effectiveness judgements are based instead on the figure derived by dividing dollars spent by number of students graduating, the results are totally different (Irmsher, 1997: 2).

Raywid (1999: 2) would also support this, arguing that

The issue of relative costs is receiving attention and a first cost-benefit analysis of New York's small schools found them to be a good value, with the quite small additional budgets...well worth the improved outputs. When viewed on a cost-per-student basis, they are somewhat more expensive. But when examined on the basis of the number of students they graduate, they are less expensive than either medium sized or large schools.

Smaller schools have more positive educational outcomes. Perhaps it is Witham (1997) who

makes the most interesting and important point; changes in the educational system, such as consolidation, must ultimately include learning outcomes as part of the cost savings equation. If consolidation leads to saving money but impacts negatively upon student performance, then what has really been saved. It is to this issue that we now turn.

School Size: Is it Important?

As stated previously, there are assumptions that larger school units can offer increased educational opportunity while lower operating costs. This section will explore the idea of enhanced opportunities and learning outcomes.

First, while it cannot be denied that increased size does offer more types of programming opportunities, they may not be as great as one would think. For example, Cotton (1996) found that only a 17% increase in the variety of program offerings is realized as a result of a 100% increase in enrollment. Furthermore, it is found that most students rarely utilize the opportunity for a more diverse program. It has also been argued that often larger schools can offer special programs for disadvantaged and disabled students. Despite the presence of these programs, Irmsher (1997) reports that they often lead to isolating these students and cutting them off from the main culture of the school. In fact she further argues that larger schools lead to social stratification where it is the academic and athletic stars who benefit from close daily contact with adults. This means that within the school the other 70-80% of the students belong to social groups whose membership does not include any adults. Fanning (1995) maintains that consolidation and increase in school size often worsens the social problems that teachers, school administrators, politicians and adults in general often worry about. For example, Giessen has reported that larger schools are more likely to have a greater number of suspensions and more long term suspensions than smaller schools. Furthermore, he reported that larger schools are more likely to have a greater number of teen pregnancies than smaller schools. This problem is further exacerbated, according to Giessen, because further increases in size decreases parental involvement. Giessen goes on to state that "Not only do small schools and smaller districts educate as well as larger schools, but evidence suggests better (1998: 4). Marion and McIntire (1992) in a study which examined 710 schools in the United States demonstrated that smaller high schools had greater levels of achievement and attained more years of post secondary education after graduation. Irmsher (1997) concludes that larger schools:

- have poorer attendance than smaller schools;
- dampen enthusiasm for involvement in school activities;
- have lower grade averages and standardized scores;
- have higher dropout rates;
- and have more problems with violence, security and drug abuse.

In addition to the above, there is also the negative impact of being bussed. While the empirical literature in this area is sparse, there is, however, sufficient literature to at least warrant a cautionary note that consolidation that leads to bussing, particularly across long distances, may have negative impacts upon student performance and health. For example, Fox

(1996 quoted in Zars, 1998: 3) writes that

as time on the bus increases, students participate in fewer non-essential activities (those activities other than sleep, personal care, school, and the bus ride)....The individuals with large average times on a bus report lower grades and poorer levels of fitness, fewer social activities and poor study habits. The universal complaint by all students is the loss of choice in activities and the overall loss of sleep.

It may also impact in other ways according to Zars. For instance it may have a negative impact on lifestyle (i.e. skipping breakfast) or parents may be more likely to keep a child who is not feeling well home, knowing that if the child becomes sicker it may be difficult to see that the child gets home. Zars also reports that she has failed to find any state reports that seriously consider the effects of bussing. It remains an unknown. She states that there are three essential questions to ask:

1. What is the impact of long bus rides on children (greater than 30 minutes one way)?
2. What is the impact of long bus rides on families?
3. What are the true costs of bus rides (including the costs of child travel time)?

She concludes by writing

Bussing policy choices have been made and expanded without regard to the impact on the central enterprise of schools which is student learning....research is scarce and where it exists on school bussing in this country, insubstantial (Zars, 1998: 6).

While this is in reference to the United States, the literature here in Canada is no better.

While large schools have many disadvantages associated with them, small schools seems to fair much better in their assessment documented in the empirical literature. For example, Meir (1996) argues that optimal school size is between 300 and 400 students. She argues that there are a number of benefits that can be realized from this size of school. First, there is the general issue of administration, management and governance. Communication is easier and more efficient and effective in this size school. Second, there is an opportunity to enter into relationships with others and therefore children and teachers truly get to know one another and it is only in relationship that respect is generated - the very foundation of education. Third is the issue of simplicity; a smaller, less bureaucratic structure allows more readily for the individualization of instruction in response to individual needs which is also enhanced by relationships and ease of communication. Fourth is the issue of safety and security. A smaller school means everyone knows everyone and hence intruders who do not belong are easily identified. Furthermore, there is a greater sense of community and hence a greater sense of responsibility for the school. Students and teachers are more likely to engage in responsible and constructive community action when there is sense of belonging and community present in the school. Fifth, parents are more likely to be involved. Given the greater ease of communication, establishment of relationships, and less bureaucratic protocols, parents are more likely to form alliances with

teachers who they believe care about their child's progress. Sixth, there is improved accountability. In a small school that is characterized by ease of communication, established relationships and a sense of community, and parental involvement, then everyone knows how students are doing. McEwen (1996: 3) defines accountability as "Who is responsible for what and to whom." In the small school where there is respect and open communication it becomes apparent that teachers, administrators, parents and children all are involved in the educational process and in that sense must be accountable. In other words they are accountable to each other. Seventh, is the issue of belonging or feeling connected to a community and this means eliminating social stratification so that all members belong to social groups that consist of students and adults. This is more easily realized in small schools for all community members are needed in order to have sufficient levels for participation - not just the stars. This is supported by Irmsher (1997) who argues that smaller schools provide an atmosphere and culture that encourages teachers to innovate and students to participate. Roelke (1996) found that participation rates are greater in small schools with more students participating in a diversity of activities. Cotton (1996: 3) argues that

Many practices common in small school are in operation largely because they are much easier to implement and manage in small environments than in large ones. Looking at instructional practices in small schools, researchers find that teachers are more likely to form teaching teams, integrate their subject-matter content, employ multiple grouping and cooperative learning, and use performance assessments. Finally, small schools tend to exhibit greater emphasis on learning that is experimental and relevant to the world outside of the school.

The result is greater commitment from both groups, more positive attitudes and satisfaction, higher grades and test scores, improved attendance rates and lowered dropout rates (Irmsher, 1997). Cotton (1996: 3) further writes that

...the need, in small schools, for everyone's involvement in school activities appears to be related to other social and affective areas. People in small schools come to know and care about one another to a greater degree than is possible in large schools, and rates of parent involvement are higher. Staff and students are found to have a stronger sense of personal efficacy. Small-school students tend to take more of the responsibility of their own learning, learning activities are more likely to be individualized, classes are typically smaller, and scheduling is much more flexible.

One of the common points of agreement is that those students who can best be considered marginalized have better academic outcomes in small schools than in large ones. For example, Irmsher (1997: 2) argues that all students, regardless of socioeconomic status, progress adequately when they are part of a "smaller, more intimate learning community"; in other words no one suffers academically from being in a small school. Howley (1996), however, argues that while school size may not matter for the performance of affluent students, small schools do benefit the performance of the impoverished. This leads Howley to conclude that relative poverty or affluence then becomes an important variable in the context of school consolidation and that consolidation may work against those communities that are most in need of help. Levin

(1995) notes that an increasing number of the poor are single parent families and that 90% of single parent families are headed by women. He argues that while single parent families constitute a significant proportion of "disadvantaged" students, it is not their single parent status that contributes to the problem but the fact that a significant proportion of single parent families live in poverty. Thus educational policy intersects with social policy and social and educational policy cannot be treated nor created in a "policy vacuum." Levin further argues that one of the strongest links for alleviating poverty's effects is the forging of stronger links with families and communities. Yet as has been demonstrated in this review of the literature, school consolidation creates distance between the school and parents and the community, the very things that Levin argues are essential in alleviating poverty's effects on educational outcomes. Thus school consolidation actively discriminates and disadvantages those who are most in need. As Levin continues, socio-economic status is the best predictor for how much schooling a person will receive, how well they will perform, and what their life prospects will be beyond school. He concludes that "Poverty has such an enormous negative influence, however, that it must be part of the education reform agenda whether justified on grounds of economic interest or social justice (1995: 211)." Cotton cites the following advantages of small schools:

- enhancement of personal and academic self concepts of students;
- greater sense of belonging and less feelings of alienation;
- more positive attitudes of teachers and administrators;
- significantly higher participation rates in extracurricular activities;
- higher attendance rates;
- less dropout rates;
- and less behavior problems.

Clearly all of these qualities and characteristics are likely to enhance the performance and the success of the disadvantaged student and the affluent student alike.

Raywid (199: 1), reflecting on the many studies conducted during the 1980s and 1990s that compared small schools with large schools, writes

These studies, involving large numbers of students, schools, and districts, confirmed that students learn more and better in small schools. Students make more rapid progress toward graduation. They are more satisfied with small schools, and few of them drop out than from the larger schools. Students behave better in smaller schools, which thus experience fewer instances of minor and serious infractions. All of this is particularly true for disadvantaged students, who perform far differently in small schools and appear more dependent upon them for success than do more fortunate youngsters....As these studies-of-studies show, it is rare indeed to find empirical support or justification for the large high school.

She continues

All of these things we have confirmed with a clarity and at a level of confidence rare in the annals of education research (1999: 1).

But the impacts of small schools also have positive impacts on other aspects in terms of school personnel and the institution. Raywid (1996) reports that teachers have a growth in commitment to the school and students, engage in reflective practice, and expand extra efforts in ensuring that students are active and succeed. In addition, she states the result is improved school organization, effective and appropriate governance, stronger student supports, improved staff effectiveness and satisfaction, better advisement, and enhanced curricula. Raywid (1996) also argues that in times of change small schools are easier to restructure and reform strategies easier to implement. Clearly the benefits of small schools are indisputable.

School Consolidation and the Rural Community

In the above section it was demonstrated that one of the most important variables in considering school and board consolidation is the relative affluence or poverty of particular communities. This section continues that discussion, examining what the impact of rural school closures and board consolidation has on rural communities.

In many areas in Canada and the United States, the school has traditionally been the focal point as community meeting place and resource. This is found to be especially true of rural regions where the schools have long been central in community activities and the shaping of local identity (Miller 1995). Fuller (n.d.) describes that schools served as sources for entertainment for the community, as a [catalyst for democracy] as the setting for political debates, as a forum for community problems and an opportunity for community members to take an active part in the political process. A school community centre also helped to improve the [climate for education] (Fuller n.d. p. 430). It is in the rural school that the [innovative] practices, such as cross-age grouping and the use of the local community in the classroom, now being used in urban settings originated (Sher 1981). Rural schools are typically a source of pride, identity and stability for their communities (Sher 1981) and usually reflect and shape the social, economic and cultural outlooks and conditions of their communities (Seal and Harmon 1995). Howley (1997) has argued that rural schools sustain local communities as thoughtful and expressive actors. Salent and Waller (1998) have argued that schools have positive social and economic impacts upon their host community and provide a fundamental element of ongoing community development. However, as they have suggested, the literature actually suggests this rather than demonstrating it. There is little research of what the impact is on rural communities when schools have been closed and boards consolidated. The questions, according to Salent and Waller (1998) that need to be answered are:

- What happens to rural communities when consolidation results in the closing of a local school?
- Do these communities lose their economic vitality?
- Do these communities become less cohesive?

- Do these communities experience a decline in political involvement?

In a search to address some of these questions Salent and Waller (1998) reviewed the pertinent literature and found only three studies which examine the economic effects on rural communities. A summary of these studies revealed that:

- The school district payroll ranged from 4-9% of the total county payroll.
- Total take-home pay from school district jobs ranged from 5-10% of the counties retail sales.
- The school district expenditures ranged from 1-3% of all employed people in the counties.
- People employed by the school district ranged from 1-5% of all employed people in the counties.
- Realtors reported that they believed that the school was essential in order to maintain property values.
- Schools are fundamental in promoting social distinction and community identity.
- Schools are the source of a significant number of community events.
- Schools unite communities.

In a study undertaken by Sell et al. (1996) that compared communities where a school was closed with the communities who were the recipients of these students in their community schools, they found that:

- The host communities' community organization participation increased while vacated communities' participation declined.
- The quality of life scores for each of the vacated and host communities declined but the vacated communities' scores were significantly lower than the host communities' scores.
- Parents in the vacated communities had less parent-teacher contact than the host communities and participated in less school activities.

Clearly, in this study, vacated communities reported a significant decline in the quality of community life, not to mention playing a less active role in the education of their children.

Lane and Dorfman (1997) and Salent and Waller (1998) maintain that the community relies on the school and in the time of economic downsizing and restructuring, the rural school is often the strongest community institution and may play a prominent role in the development of social capital and community development. Salent and Waller (1998: 5) capture this when they write

There is more to schooling than meets the eye of teachers, legislators, and academics who conceptualize purposes for schooling not fully shared by those who constitute a community. There is a school's noneducative, community-maintenance function, which usually becomes apparent to its support group only when it is threatened. ... As schools have become more professionalized and centralized, they have tended to distance themselves from their local communities. The vital links between experience, work, and education have been weakened. As a result, public and private schools in many urban and rural communities have lost their power as a valuable community resource.

Failure to acknowledge school community relationships also negates the potential role that the community may play in the educational function. Miller (1995) argues that the community can serve as part of the curriculum where it can be examined in its complexity - its history, its economy, its ecology to name a few. It becomes a living laboratory through which students learn. Furthermore, it enhances their sense of connection to place, an important, and we would argue essential ingredient to developing sustainable rural communities. Second, it can be a source for the development of entrepreneurial skill, leadership development, and a sense of civic responsibility. Furthermore, it gives the children a context in which to develop these whereby they can see the potential of their own community. One of the challenges that rural communities face is the outmigration of their brightest and best youth. Perhaps this would provide them with the incentive to look to their own home community as a potential future.

We believe Miller (1995) is right when he suggests that rural schools are the cultural center of the community, serving many functions that cannot be quantified or calculated in a cost/benefit analysis. As Giessen (1998: 5) wrote, "These costs are much more difficult to put dollar figures on, but they do play a significant role in the local community." Shannon (1992: 1) provides a fitting closure to this section of the review. He writes that

I am convinced that the fundamental problem with public education is that our schools are divorced from their communities; education is divorced from everyday life. ...The price of separation has been high. It has cost educators a wealth of resources and potential support. It has alienated adults, diminishing their understanding of education, their interest in lifelong learning and their ability to help their children learn. But most detrimental to society as a whole has been the weakening of children's ties to their parents, to their communities, and to the idea of learning as part of life.

Governance and Organization

As stated earlier in this review, the central organizing principle of educational reform has been tied to 19th century notions about modes of production and further extended by Henry Ford's model of mass production and Fredrick Taylor's scientific management whereby control and knowledge of the production process was centralized within management. Taylor believed that knowledge and responsibility should reside with management and those who actively engaged in the production process on the shop or factory floor should have as little responsibility/authority as possible, and knowledge should only be shared with them that was necessary for them to carry out their designated functions. The question that arises, at least for

us, is bigger really better? Or to frame it another way, is this anyway to manage education? Since education's organizational structure was inspired by developments from the 19th century private sector, it might be interesting to look at contemporary changes in organizational design and development.

Lauzon (2000), in a study that examines the literature from organizational development, with a special emphasis on learning organizations and its application to rural communities, found that (1) organizations had changed and this was in response to the changing nature of change; (2) organizations need to be readily able to adapt to a changing environment; (3) the ability to adapt requires reflexivity and a capacity for organizational learning; and (4) that highly centralized hierarchical organizational structures were dysfunctional, unable to respond to change rapidly, and were being replaced by decentralized networked structures whereby the flow of resources could be easily redirected in response to change. It is ironic that although business is a driving force behind educational reform, it continues to promote changes that are based upon outdated industrial models of organization, hardly suitable for a knowledge based economy.

Gallagher (1995), in his book *Changing Course: An Agenda for REAL Reform of Canadian Education*, has argued that educational reform has, in the nineties, been characterized by two approaches: increased centralization, as characterized by educational reform in Canada, and increased decentralization, as characterized by educational reform that has taken place in New Zealand. Commenting on recent changes in education in Canada, Gallagher (1995:71) writes that

This move to another round of consolidation of school jurisdictions in Canada, on the grounds of savings and efficiencies, is an excellent example of first-order change or of trying to "do more with less." It does not consider doing different things with less, or doing things differently. This approach is constrained by the perspectives on an industrial society. It suggests that the solution to excessive administration and inefficiency is larger (and therefore more efficient) units of administration. It sets aside the non-financial but real costs of further distancing parents and other community members from what once were their schools. In truth, many school boards, particularly in the larger school districts, are already as remote from the people they represent as provincial and regional governments are. The argument that school trustees are still the voice of local government is, in many cases, naive.

Gallagher argues that reform needs to be characterized by second-order change, radical change that challenges the very foundation of how education is organized in Canada. He recommends that Canadian education, to meet the challenges of a post industrial age, must adopt a decentralized approach to public education whereby communities take responsibility for schools through school councils who are invested with real authority and resources. This would be in alignment with the types of organizational changes that have taken place in the private sector and would lead to greater flexibility and adaptability to meet local needs and reintegrate schooling back into the community.

Discussion and Conclusions

The literature has highlighted a number of issues that need to be considered in the context of rural school closure and board consolidation. First, there is little empirical evidence for cost

savings that can be realized through consolidation and board closures. The literature reveals that this is a contentious issue and that differences in outcomes are dependent upon on how administrators and politicians calculate the costs and savings. The alleged savings that can be realized at this point appear to have more to do with rhetoric and ideology than it has to do with the empirical realities of what we currently know. There is a need to have clear principles for making these calculations and it must account for the consequent educational outcomes. This is particularly important given the preponderance of evidence supporting that small schools are more effective pedagogically than larger schools, particularly for disadvantaged and marginalized youth. Furthermore, there needs to be accounting of the impact upon student's lives and their development. Education is about more than simply class room learning, but much of the education of students occurs as a result of being an active and participating member of a community. It is here where students learn their first lessons in civic and social responsibility. It is here where students learn lessons in compassion, empathy, and leadership. Not through textbooks and classrooms but through their active participation and involvement in their school community. Consolidation often negates this opportunity for many students to participate in these activities as a result of long rides to and from school, or as a function of school size. As stated in the review, it is only a select group of students in large schools who have the opportunity to become members of communities that share time and space with adults. Giessen (1998), reflecting on the nature of large schools and paraphrasing the Carnegie Council, characterizes large schools as "mills" whose main function is to "process" the masses of anonymous youth into an endless stream of students.

Furthermore, decisions with regard to closure and consolidation cannot ignore the positive reciprocal relationships that can be developed and cultivated between communities and their schools (Miller, 1995). While the evidence is not great, the uncertainty is and we simply do not know what happens to rural communities when we close their schools. Certainly economic globalization, government restructuring and industry downsizing have taken a significant toll on the quality of rural community life (Lauzon and Hagglund, 1998). Is it the case that the closure of rural schools is simply another "nail" in the "coffin" of rural life? Policy makers must recognize that the complexity and intersection of policy is played out in rural communities in very real and tangible ways. As stated before, educational policy, if it is to consider its impact upon rural life in a significant way, cannot be written in a "policy vacuum." Furthermore, there is much that community has to offer schools. The cultivation of this relationship as a true partnership offers benefits to both the community and to educators and students.

Few would refute the educational reform is necessary. However, it needs to be acknowledged that education is often used as a scapegoat, relieving of us of our collective responsibilities for that changes that we all need to make (Shannon, 1992). Reform is necessary, but as Gallagher (1995) suggests it needs to be radical; trying to do more with less will not solve the problem. We need to do things differently. Lauzon (1998) has suggested that we are at a fundamental turning point in our collective history, that the changes that we are encountering are on par with the changes that were brought about by the scientific and industrial revolutions and that these changes will facilitate structural changes. Part of this change is a need to change our metaphor of education from organization to community and this has implications for size (Raywid, 1999). Fanning (1995) suggests that leaders, politicians and citizens have invested significant faith in technical and structural solutions to social and economic problems, failing to recognize how the fundamental assumptions of modern life have shifted. Senge (1990: xii) captures the essence of this in his book *The Fifth Discipline* when he writes that

I have come to believe that there is an opening today for a new movement of meaning and change. Our traditional ways of managing and governing are breaking down. The demise of general Motors and IBM has one thing in common with the crisis in American schools and the "gridlock" in Washington - a wake-up call that the world we live in presents unprecedented challenges for which institutions are ill prepared.

We need to challenge the very assumptions upon which public education has been built and the relationship of school to community. If rural communities are to not only survive, but thrive, then educational solutions must acknowledge and account for the necessary relationship between rural communities and their schools. Technical solutions are not enough. As Fanning (1995: 4) writes "The sound development of children is closely linked to the well-being of communities. Consolidating often destroy these links." If we wish to "produce" more than technocrats to work in the global economy, but whole humans interested in community life and engaged in responsible citizenship, then we need to forge linkages between students and communities, between students and place. Giessen (1998: 6) writes that

If one thing is clear from the research it is that small schools are worth saving and that small schools are worth the cost.

Having completed this review of literature, we would agree.

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ARC PRESENTATION

John Pettier

INTRODUCTION

I have two children that attend St. John's in Woodslee.

I have chosen to send my children to St. John's, a small rural school, because I felt they would benefit from the close knit community school environment.

According to the ARC document "It is recognized that the schools value to the student takes priority over the other considerations about the school".

In particular the value to my younger son Keegan has been immeasurable.

He has benefited greatly from being a part of the school community of St John the Evangelist.

ABOUT FX

Keegan is ten years old and a grade four student.

Keegan has Fragile X Syndrome.

Fragile X syndrome is the most common inherited cause of intellectual disabilities.

It affects 1 in 4000 males and 1 in 6000 females.

The majority of males with Fragile X have significant intellectual disabilities.

Keegan is no exception as he is significantly developmentally delayed.

Although he is in grade 4 he functions at a much lower level academically and socially.

He requires an IEP and an EA in his class with him

STAFF ACCOMMODATION

The staff at St. John's has been second to none in my son's education.

Even specialists with the school board commented to us at a recent IPRC meeting that St. John's staff and school have done a wonderful job at being inclusive with special needs students.

On many occasions the staff have gone the extra mile to accommodate Keegan`s unique needs.

In grade 3 Keegan`s teacher gave him a math textbook because she saw the very subtle cues from him that he was upset that he did not have a book like the other students in the class.

When the teacher instructed her students to take out their math books he would proudly take it out along with all the other students even though the work sheets he did were different this still made him feel included and not isolated from the rest of his class. This very simple thing meant a lot to him and to us as his parents.

When Keegan was in grade 2 his teacher took the time to find special sheets for him to practice his printing.

At first he went to a separate room to do the sheets with his EA but when Keegan was brought elsewhere this caused him a fair amount of stress as he felt he was being singled out and wasn`t part of the class.

His teacher noticed this was upsetting him and recognized that all he wanted was to be like the other children.

She then had Keegan do his printing practice in the classroom while the other students took their spelling tests.

He would trace out the spelling words and then try to print the word next to the traced word.

This helped him improve his printing skills as well as learn to spell the words.

When the end of the school year came we thanked his teacher for everything that she had done for Keegan to make him feel included and accepted.

Her response was to thank us for the honour of teaching our son and how much he enriched her life and taught her by being in her class.

These are just a couple of examples of the excellent quality of expertise that the teaching staff of St John`s possess

EDUCATIONAL ASSISTANTS

Keegan has also received exceptional support from his Educational assistants.

Over the years they have provided him with the consistency he needs as he has moved from grade to grade.

They have developed a trusting relationship with him. This is very difficult to establish with a child with Fragile X due to their social anxiety.

This consistency and trust are two incredibly important things to a child with special needs.

They have always come up with new and interesting ways to keep Keegan engaged in learning.

They have always been able to help him through the obstacles that Fragile X has put in his way.

As parents we have been able to establish excellent communication with all of the staff at St. John's which is essential to Keegan's education.

It is our firm belief that this type of open communication is only possible in a smaller school like St. John's.

PEER RELATIONS

Keegan's peers have also been nothing short of amazing in accepting him and always including him.

When Keegan first started at St. John's developing peer relationships was very difficult for him.

Children affected with Fragile X often have extreme social anxiety and shyness.

He often sought out his big brother as a source of comfort and familiarity in a new environment.

His early interactions in playing with peers was to play along side of them and not directly with them , a parallel playing situation as opposed to an interactive playing situation.

However throughout the years Keegan has developed his peer relationships to the point where he regularly participates in the games that other children play.

It has taken almost 5 years for him to develop the type of peer relationships that many of us take for granted, that are so easily formed both as adults and as children.

When my wife and I attended Keegan's IPRC meeting we noticed it was recess so we peeked in on the playground to see how he was doing.

Keegan was playing soccer WITH the other children; passing the ball and receiving passes and even engaging in a little smack talk with them.

It was at one point during the game we heard one of the children shout out "let Keegan score!"

Keegan scored his goal and the children on BOTH sides celebrated his achievement.

This type of peer interaction would happen only in close knit community like St. John's.

In a larger school environment or a merged school environment children like Keegan would simply get lost in the crowd.

SOMETHING SPECIAL ABOUT ST JOHN'S

One of the unique things about St John's is their House League sports program.

While many schools may have this program it is particularly special at St. John's as Keegan is actively involved in the schools house league sports program not just cheering his team on but even playing in the games.

This has given him the opportunity to actively participate in organized sports.

Opportunities for children with special needs to participate in organized sports or social activities is often very limited.

Since he has been participating in house league he has gained confidence in his own athletic abilities and eagerly looks forward to his team games.

Keegan is also involved in the milk program at school delivering the milk to the various classrooms helping him to overcome his shyness.

Keegan has also won student of the month for his exceptional attitude towards the school and learning.

Because of the accepting school atmosphere and encouragement of staff and students Keegan has gained confidence to overcome his social anxiety and extreme shyness.

With help from the staff and students of St John's Keegan is growing into a more confident young man each and every day.

His classmates as well as the other students in the school have always treated him with kindness and respect and never once has he been mistreated or picked on in any way.

One of our greatest concerns is that he would not be accepted because he is "different" from other children.

This has NEVER been the case at St John's .

As the parent of a child with special needs this is always a concern for us. But at St. John the Evangelist we have never had to be concerned with this as his peers have always been accepting of Keegan and even go out of their way to include him.

Keegan has even been invited to his classmates birthday parties and for that I must give credit not only to his classmates but to their parents and for that I thank the community of St. John's for accepting Keegan for who he is right along with other children.

The relationships he has developed over the 5 years of attending St. John's are invaluable to him and to us as Keegan's parents.

As a parent of a child with special needs there is always an added sense of worry or concern that we often feel . We have never been concerned about Keegan's safety or well being while he is at school because we know that the staff and students of St John's are exceptional and that they care about our son.

LARGE SCHOOL

We would not have that sense of ease if Keegan were to attend a larger town school because we know that it would be more difficult for the staff to keep a close eye on him because there would be many more students for them to watch over.

A large school coupled with entirely new surroundings would pose many difficulties for Keegan.

With large schools comes more noise, more people, more chaos which can overwhelm a person with Fragile X.

This can often translate into negative behaviors such as outbursts or cause the child to become withdrawn.

Keegan would most likely become withdrawn .

It takes Keegan a significant amount of time to "warm up" to new people.

We are quite certain that all of the remarkable gains that he has accomplished academically and socially would be lost.

Since Keegan has been at St. John's he has blossomed, he has made friends and is accepted by his peers.

It is also a well known fact that larger schools have higher incidents of disruptive behavior and bullying.

If we as Keegan's parents are faced with the prospect of sending Keegan to a large town school vs a rural school then we will be looking for another rural school for both our children even if that means sending them to a public school.

CONCLUSION

As Keegan's parents my wife and I have had to strongly advocate for him.

Throughout his life we will have to be his voice when he is unable to speak for himself.

However, as Keegan's parents, and it is terrifying to say this, we can't give him everything he needs to succeed to the best of his abilities.

We may be able to give him what he needs for his safety and security at home and when he is out in the world with us.

We can make certain his physical and emotional needs are met at home and when he is out in the world with us.

But what is equally true, as in old African proverb adopted by a woman that many have looked up to, including myself, IT TAKES A VILLAGE TO RAISE A CHILD.

This is especially true of children with special needs.

We need the community of St. John's school to help us in Keegan's life.

This is something that parents who do not have special needs children may find difficult to grasp.

However, I can say with absolute conviction, that I can think of no other village that I would want to raise my children in than the village of Woodslee, St. John the Evangelist School and St. John the Evangelist Church!

Keep these institutions alive!

P. Mullins
 May 17, 2012

Schedule of On The Ground Capacity/Enrolment September, 2012

	<i>On the Ground Capacity</i> O.T.G.C.	Current Enrolment	<i>Goal for</i> 85% <i>men</i>	Sep/2012 Enrolment	
Holy Name	538	453	457	477	+20
St. John Baptiste	555	433	472	398	-74
St. John Evangelist	245 (221)	165	208 (188)	156	-52
St. William	584	599	496	571	+75
<i>full time</i> <i>JK 7140</i>	<u>1,922</u>	<u>1,650</u>	<u>1,633</u>	<u>1,602</u>	-31

1. St. John the Evangelist Community Use Agreement:
 OTGC reduction by leasing 3 classrooms + 3/4 of the gym
- 3 x 24 = 72
 - 20 x 3/4 = 15
 - Total reduction 87

below
85%
slightly below

Revised OTGC 245 - 87 = 158

2. St. John the Baptiste:

- i) boundary adjustment from Rourke Line to Renaud Line
- ii) open boundary with St. William's to offer full-time kindergarten at St. John the Baptiste in September 2012 rather than waiting until September, 2014

iii) the kindergarten enrolment is increasing for September, 2012 20 to 26

3. St. Williams:

- full-time kindergarten in 2014 will increase enrolment by 40 students

assessor

4. Cindy Prince's Report on population growth is reinforced by the rebound in single-family housing starts in Lakeshore

- number of single-family permits
 - as of April 30, 2010 - 29
 - as of April 30, 2011 - 37
 - as of April 30, 2012 - 57

most growth in Williams + Baptiste

Patchman area

Dear Mr. Picard,

My name is Holly Ralston. My husband and I have been residents of Woodslee for 12 years. There are many reasons that we chose this small community as our home. The main reason is that we were thinking about our future children and how we both wanted them to experience a small community-based school during their elementary school years. As well, we wanted our children to be connected to the church, St. John the Evangelist. We attend mass every Sunday, where our daughter is an altar server.

We have three children. Danielle is nine years old and is a Grade 4 student at St. John the Evangelist. We also have five year old twins, Garrett and Julia who are presently in SK at SJE. When Garrett was two years old, he was diagnosed with autism. After 2 years of intensive therapy he has made many gains and was able to enter into a regular classroom in JK at SJE.

My husband and I have never been more thankful for our small community school as we were when we enrolled Garrett into JK with his sister. This nurturing and close knit environment has been instrumental in Garrett's development (both academically and socially). Our little boy struggles in social situations and it has just been in the past few months that he has finally come out of his shell and initiated social interactions with his peers. These are children that he has known since the day he started school a year and a half ago. We celebrate this gain, but also realize that it has been a long journey for our son to get to this point.

Garrett is known by everyone at SJE. He is on a first name basis with the custodian, Mr. Joe, he helps the secretary Mrs. Giesbrecht and the principal, Mrs. Prsa, by watering their plants, and he knows every teacher from JK-8. It's not just the amazing SJE staff that knows Garrett though. He is known by every student at this school. They watch out for my son, assist him at recess and socialize with him every single day. Garrett is also supported by incredibly talented and caring Educational Assistants at the school. He trusts them and allows them into his world; a world that is opening up little by little each day.

It is the combination of a small community school, a caring and devoted team of teachers, support staff and Principal, and a sense of family amongst the students that make St. John the Evangelist a perfect learning environment for any child, whether they have exceptionalities or not.

Mr. Picard, I realize that you have a very difficult decision to make about the future of St. John the Evangelist. I sympathize with the position that you are in to have to make this decision. I am asking that you give this school a chance to prove it's worth. It isn't always about the financial implication but about the impact and tremendous value this school has to our children, our community, our church and our lives.

I have never been more certain that my son will continue to thrive and come out of the shell of 'autism' if he is given the opportunity to remain at St. John the Evangelist, his home.

God bless you.

Holly Ralston

Steve Chevalier: (start with thanks + compliments to ARC committees & Admin.)

- **Let me tell you a little about myself -- been a lifelong resident of Woodslee**
 - **both of my parents went to the "old" St. John's**
 - **I and several of my brothers and sisters attended the "old" St. John's**
 - **I was part of the 2nd set of Grade 8 graduates of the current St. John's**
 - **my children attended current St. John's**
 - **been a teacher for 34 years (interaction with thousands of students from a wide range of school across Windsor and Essex County)**
 - **I'd like to think that I'm capable of commenting on rural community schools**
- **tonite you have heard and will hear from many who will try to explain to you what a rural community school is all about -- let me share a few things:**
 - **unless you have been to one or your children have been part of one, it is almost impossible to truly understand this special situation**
 - **in no way is this downplaying what goes on in all schools, as we know there are wonderful things in all schools**
 - **but BIGGER is not always BETTER (as in: eliminate the small school amongst 4 schools and go with the 3 big ones) -- recent big buzz in education is differentiated instruction -- to get away from the one-size-fits-all model -- try to meet the needs of all the clientele. BUT this recommendation in a way flies in the face of this model.**
 - **students from rural community schools have a kind of wholesomeness that one does not find to the same degree or consistency in other schools (with 34 years of experience, I have witnessed -- a level of loyalty, respect, integrity, appreciation, togetherness, all the intangible type things that are hard to quantify BUT things that parents want for their children)**
 - **these type of schools have more multi-generation families, who are also key and instrumental in the local parish and the community**
 - **generally find some unique bonds -- Catholic School - Catholic Church -- local groups/activities (eg - Woodslee Baseball Association -- longest standing CONTINUOUS sports organization in Southwestern Ontario)**
 - **if our school closes, our Catholic Church could be next and it will make it extremely difficult for an organization like Woodslee Baseball (and other local service groups -- eg. Knights of Columbus) to continue --- about 100 years of continuity and history could be flushed down the drain with a single vote in about 1 month !!!!!**

I'm holding out hope that all trustees will see a value in keeping a small rural community Catholic School (and subsequently more than likely ensuring the survival of a rural Catholic Church -- particularly at a time when the Bishop is looking for ways to attract new members to our parishes and/or welcome those that have drifted away)

BUT we all know that the most important question is:

- **"at what financial cost?"**
- **where is that cut-off?**
 - ❖ **several thousand \$\$?**
 - ❖ **several hundred thousand \$\$?**
 - ❖ **several millions \$\$\$?**

What is the savings to close our school?

- ✚ the report addresses this quite thoroughly, although I believe some of the numbers could be somewhat misleading (for example: \$750 000 appraisal for St John's building and property -- it is just that "an appraisal" -- it's a # to hang your hat on -- who would pay this amount of money for a building in a community that was just dealt a death blow?)

BUT, there are also other QUESTIONS that do need to be asked and answered, since the report seems to give the impression that all 156 students will be retained:

- how many students will be retained if the school closes?
 - based on comments at the ARC meetings and signatures on the petition, it does not appear that 100% is the answer (some scenarios are provided below)
- at a time when WECDSB is bleeding the loss of students, is the risk worth it?
- at time when enrolment has been progressively dropping, we should ALL be doing everything in our power to retain students and/or recruit students
- if lose school + lose church = potential loss of an extremely loyal contingent of families to the Catholic system (once lost, will they ever come back?? what about their neighbours?? what about their relatives??)

so here's some realistic Scenarios: (I don't profess to know everything about the funding formulas, but I can at least give some ballpark figures based on the current per pupil funding)

- 1) IF a conservative 70% are retained -- immediate loss of in the range of \$3/4 million pupil funding
- 2) IF a loss of 10 students/year (in the long term) -- this equates to about \$1.5 million shortfall in pupil funding / year long term
- 3) large % of students who attend St John's historically go to one of our Catholic High Schools
 - I do not believe that the same can be said for the large schools that the Woodslee kids have the opportunity to attend if this recommendation passes (St John Baptist?? or Holy Name??)
 - so if we assume that the board can retain 70% of the St John's students (go to St John Baptist and/or Holy Name) -- if they follow the historical retention rates of those schools into Catholic High Schools -- equates to \$0.25 - \$0.5 million shortfall in pupil funding / year long term

I do realize that all these numbers do not represent net amounts, as they will be offset with reduction of teaching staff, support staff, maintenance staff, closing of more schools,

But hopefully this is not what anyone wants to see. If so, we might as well start to put the nails in the coffin of our local Catholic system -- because if bigger is actually better -- then we might as well be promoting ONE PUBLIC system

So I guess to wrap up:

- ✚ Is all this worth the gamble at this point?
- ✚ Is this recommendation that definitive at this time?
- ✚ Are the savings that significant to rip a community apart?

But when the BIG Wheel of Bureaucracy gets rolling -- it's tough to stop !!!

It's sometimes too easy to think of the little people as faceless individuals who should sacrifice for the good of the system. But I'm hoping that for now, you will vote to defer the recommendation beyond the one year window in the current recommendation.



St. John the Evangelist School

The Value of a Rural School

By: Suzanne Cammalleri
5/17/2012

Look at the Stars

By Anders Carson

*In the schoolyard
children swing back and forth.*

*Governments
swing back and forth
in power.*

*Teachers watch for that fall.
Parents watch for that choice.*

*A silent swing does not
a better education bring.*

You can hear the cry of long distance learning.

You can see the tears of flags being lowered.

*You can play with numbers
as well as toys.*

Manipulation is all in the hands.

*It rumbles and rolls
as a crap shoot table.*

*Soon we'll be teaching kids
in a stable.*

What happened to caring about community?

What happened to being a part of their destiny?

*Instead the folds of skin will rise
when pots of information are analyzed.*

*It is with hope that ribbons wave high
so that children's voices
will one day fly.*

*Choosing to live in a community
where it is possible to not only
reach for the stars,*

*but also
see them.*

Value of Rural School

First of all, I wanted to start my speech with a poem written by Canadian Poet, Anders Carson. He is a local parent and a councilor from the Township of Rideau Lakes. He voiced his concern in this poem, and petitioned against the pending closures and consolidations. In his poem, he fondly depicts a rural community “where it is possible not only to reach for the stars but also to see them”. He portrays this community as being threatened by school closures at the manipulative hands of governments. As these governments and school board officials press for the closures of these small community schools in the name of quality education, Carson counters this rationale by stating “A silent swing does not a better education bring”. Closures and consolidations will only bring sorrow and community devastation in the form of “cries of long distance learning” and “tears of flags being lowered”. He ends his poem with a hopeful tone, urging all stakeholders to care for these communities and their destinies.

I want to thank the Trustees for allowing me to speak again. As some of you know, I have already presented a speech twice, and I wanted to update you on my petition, and what this school means to me. My name is Suzanne Cammalleri and I am a mother of two young children, Christina, aged 10, and Matthew, age 6, who both attend St. John the Evangelist School. Back In February, I found myself unemployed and this gave me the opportunity to become actively involved in my children’s school, the church, and the community. I feel that this opportunity has been a blessing. I have met so many wonderful people on the ARC Committee, the school and the Church. As most of you are aware, I started a petition to save the School, of which to date I have received 679 signatures, and have received a response from the Minister of Education. Laurel Broten. Over the last three months, I have reflected on why I have become involved. Some people have asked me “Wow, you have worked so hard on this”,

and there have been so many appreciative people who have thanked me for my efforts. Of course, it begs the question: “Why am I doing this?” Well, to be honest, I am doing this for a number of reasons. I feel that my kids’ school is worth fighting for. Someone said to me once “if you don’t fight for your children, then nobody will”.

My children matter to me. This school matters to me, and it matters to the community. I think that it should matter to the School Board too. Woodslee is a proud community. I believe that we can be a beacon of hope, a shining example and a model to not just the Windsor-Essex County Catholic District School Board, but also to other rural communities in Ontario and around Canada. Rural schools and communities should not have to be viewed as a problem to the Board, and consolidation should not be considered the solution. We can embrace this opportunity to come together, to embrace this time to be innovative, to be creative, and to have a viable solution, one that keeps both the school and community working together, to ensure our vitality and future well-being.

As a regular church goer, I am inspired after mass when Father Dave says “Go in Peace, and serve the Lord”. I think by actively getting involved, by starting my petition is one way that I can do that. I have really enjoyed doing this. It’s given me passion about what is important, and sometimes, you don’t realize what is important until it is gone. I have actively gotten involved too in my children’s school. Recently, I participated in the Pancake Lunch, by volunteering to make pancakes. I also helped out at the Pasta Dinner that was recently held, and I also have attended the last several Parent Council Meetings at the school. I am here to

say “thanks” to everyone, and to show that I have demonstrated the Cardinal virtues of fortitude, justice and stewardship.

This process has been very therapeutic to me, and it feels like I am doing what God expects of me by extolling the cardinal virtues of fortitude, justice and stewardship, and how these virtues connect to the expectations of the Ontario Catholic School Graduate.

The cardinal virtue of justice relates by a discerning believer formed in the Catholic Faith Community by promoting social responsibility, a reflective and creative thinker who recognizes that hope is essential in facing all challenges; a collaborative contributor who achieves excellence, originality and integrity, and a caring family member who ministers to the family, school, parish and wider community through service. The cardinal virtue of stewardship is visible in our Catholic school communities when care for God’s many gifts is practiced out of love for God and one another. The character of Catholic School communities tells us about stewardship. It relates to the Ontario School Graduate by a discerning believer who develops attitudes and values founded on Catholic School teachings and acts to promote social responsibility, human solidarity and the common good, by being a reflective and creative thinker who examines, evaluates and applies knowledge of interdependent systems (Physical, political, ethical, socio-economic and ecological) for the development of a just and compassionate society). Fortitude is courage, and a person of fortitude practices patience when meeting obstacles while working to do what is right, even when others criticize them or remain silent. The cardinal virtue “fortitude” relates to the Ontario Catholic School Graduate expectations by being an effective communicator who presents information and ideas clearly

and honestly and with sensitivity. It is a reflective and creative thinker who adopts a holistic approach to life by integrating learning from various subject areas and experience. A self directed responsible life-long learner who takes initiative and demonstrates Christian leadership, and a collaborative contributor who develops one's God Given potential and makes a meaningful contribution to society. It is a responsible citizen who promotes equality, democracy and solidarity for a just, peaceful and compassionate society.

In my research, I have found many strong cases of the importance of the rural school to it's community, and I am going to share with you the Value of the School based on the following:

Value to the Community.

Catholic social teaching is a rich tradition that is rooted in the Scripture. In 2009, Pope Benedict XVI teaches on points essential to human development, the environment and the progress towards the common good of all people. The common good encourages individuals and communities to act on behalf of the good of all. The common good is also social which that each of us finds comfort and happiness when we belong to a community and accepted for who we are. The common good is cultural – which gives meaning to our lives by allowing us to act in concert with others and leading each of us to live, work and believe together.

St. John the Evangelist school is the heart of the community. My petition, which has received over 600 signatures, demonstrates the communities' love , their commitment and their resolve for the common good, which is to save our school.

In her master's of Education thesis by Carolynn Thompson from Queen's University in May 2011, titled "Where does the Small Rural School Stand? Exploring Different Perspectives", she argues that small rural schools are the lifeline of their communities, they are viable and valuable, not only to the local community, but to the local students' well-being and future education. The rhetoric of program enhancement, consolidation and boundary alignment have potentially harmful implications of the viability of small towns. One researcher states that small rural schools are perceived as sites of disdain in the eyes of educational officials. Bard, Gardener and Wieland state that in an educational climate where standardized, global conceptions of school overrule rural priorities, small rural schools continue to be viewed as inefficient, uncoordinated, and outdated. Small schools are perceived as expendable against "the bigger is better" and "One size fits all" mentality of the urban scholar. Herzog and Pittman indicated that recent Canadian Studies have indicated that small rural school closure has become the number one reform effort in Canada. Fewer larger schools are fiscally efficient and enhance quality education. Small rural schools are a problem and that is a problem for the viability and community centered learning. Canadian studies conducted in the field of rural education emphasize the need for future research on the impact of consolidation efforts on rural lifestyles and priorities. Rural education research and concern for sustainability of small rural schools, these viewpoints are rarely considered in school reform agendas. The Ministry of Education of Ontario's Declining Enrolment Working Group identified a rural school in one of two ways: the second character of the school's postal code is zero, or the school is listed as a rural school by the provincial Grants for Student Needs regulation. The research on rural education is that most rural schools are small and smaller populations increase the chances for

a multi-grade classroom organization. Bard et al explain that historically school consolidation has been a way to solve rural issues in the eyes of policy makers and educational officials. In Ontario, existence and vulnerability of rural schools to the globalization and efficiency and productivity focus has shifted from child-centered curriculum to the economy centered vocational training.

St. John the Evangelist school adds value to the community. At lunch time, I can hear the children laughing in the school yard, - their laughter is echoed through the flood plane, as I live on Belle River. To lose our school, to lose the sounds of children laughing, means losing our vitality to the community. Research has shown that students are able to cultivate rural meanings and identities by engaging in locally responsive curricula and community centered activities in small rural schools. According to researchers Newton and Newton, smallness is a positive feature of many rural schools. Herzog and Pittman “rural perceived from urban viewpoints lead to negative stereotypes “country bumpkins”. Rural schools face challenges of declining enrollment and birth rate declines. In Ontario, the number of students in Public education system would decrease by 72,000 or 3.9% by 2013.

Imerson states that “smaller communities are typically places that naturally result in close interpersonal connections, where individuals know, share with and care for each other. Smaller schools mirror these qualities. Rural schools are the glue that binds the community together and serves as their economic and social hub, filled with local community pride and support. Herzog and Pittman state that rural schools have strengths that should be part of the prescription for remedying problems and directing changes in rural education. Researchers

suggest that the development of school and community relationship establishment of networks and various groups including school divisions and the provincial government to contribute to the effective learning environment. (Bard and Wallin)

Value to the Student

I have a letter here that my daughter wrote to Mr. Picard, and she wanted me to submit it for your review. Unfortunately, she was not able to attend tonight as she had previous commitment.

My daughter has made some great friends here at the school. She is also an alter server at the Church. She is very kind and loving, and has a sensitive soul.

Many researchers view small rural schools as communities within themselves. By closing small rural schools and creating large, urban mega-schools, the small-family like community aspect of these rural schools is lost. Sergiovanni describes communities as collections of people who share mutual commitments and special relationships and are bound by a set of shared ideas, values and beliefs. These communities foster caring, kind, helpful people who have a sense of belonging and responsibility towards themselves and others. The positive feature of small rural school cultures foster caring and cohesive communities, which exemplify the following traits – sustaining relationships, providing individual support, supporting student effort and expanding opportunities for success. Most recent rural education capitalizes on the strong sense of community that thrives within and around many small existing small rural schools. Rogoff, Matusov and White's (1999) community of learner's instructional model, which is based on the theory of situated cognition, proposes that learning is a process of

transformation of participation in which both teachers and students contribute support and direction to shared endeavours. Thus within a small school, learning and development occur as people participate in the socio-cultural activities of their community which transform their understandings, roles and responsibilities as they participate. Newton and Newton state that in small rural schools, there is community-school integration, enhanced parental community involvement and hands on learning in the real world

A Canadian Study underscores the viability and importance of small rural schools. Corbett and Mulcahy, Canadian Researchers, have body of evidence that supports the effectiveness of small schools in providing students with equality of educational opportunities. The research states that there is no evidence that larger schools are better for students. The Broader curriculum of the larger school does not necessarily, have a positive effect on student achievement. The Canadian government now recognizes that rural communities are important to the fabric of the country.

Researchers outline specific themes pertaining to small school viability and value, such as: Self-esteem, self-respect, feeling valued, working effectively and cooperatively with others, caring for others and volunteering for leadership roles. These themes are related to the holistic development of students. Research literature also confirms that in terms of social and affective development, students excel in smaller schools. Small rural schools provide a personalized learning environment that fosters students' social and affective development (Corbett and Mulcahy). As Corbett and Mulcahy state "It would be a grave error to close these schools now

or at any point in the future. To do so would be a backward step which is totally out of synch with the best current thinking in education in North America.

An American Study, Jimerson states that small rural schools are the glue that binds together small communities, serving as their economic and social hub. Identifying key effective elements of smallness, will help to improve schooling in places where small schools are forced to conform to the illusion “bigger is better”. Jimerson explores ten reasons why small schools work:

1. There is greater participation in extra-curricular activities and that is linked to academic success.
2. Small schools are safer
3. Kids feel that they belong
4. Small class allows for more individualized instruction
5. Good teaching methods are easier to implement
6. Teachers feel better about their work
7. Mixed-ability classes avoid condemning some students to low expectations
8. Multiage classes promote personalized learning and encourage positive social interactions
9. Smaller districts mean less bureaucracy
10. More grades in one school alleviate many problems of transitions to new schools.

She argues that attributes such as student’s sense of belonging, school safety, and teacher morale are closely linked to the quality of inter-personal relationships found in small schools.

To expand energy on closing these schools diverts energy and focus on strengthening them
“Jimerson.

Canadian researches Newton and Newton explain that the following effective and well-respected teaching practices originated in small schools; individualized instruction, peer-tutoring, cooperative education, and school and community relationships

The advantages of small rural schools in Canada include: Lower pupil/teacher ratio, equal opportunity for extra-curricular activities, more leadership opportunities and high level of community support for schools. Rather than closing small rural schools we should be capitalizing on their contexts. Small school populations could lead to school-community integration and locally relevant curricula. School has become a marketable commodity. As schooling converges to one single market, the benefits of small rural schools such as smallness, sense of community, equal extra curricular opportunities are deemed deficiencies instead of advantages. The purpose of education tends to focus on the universalized, standardized education of citizens, instead of the unique learning experiences of the individual. Rural schools will continue to be exploited in the name of efficiencies. Small rural schools have many gifts to give and closing them down or consolidating them will hinder both student learning and rural community and identity.

Research shows that small schools are beneficial to student learning “small rural schools provide a family like school culture, including community involvement, peer teaching and leadership opportunities. Student achievement is high in small schools. Small schools provide increased quality education. Students from age 10 to 15 show gains in mathematics, language

and reading when they attend small schools with low student teacher ratios and shared teaching. Small schools are the symbol of the community identity, and closing schools will lead to the demise of the community.

Small rural schools are in an ideal position to steer away from grouping students by age and organizing schools like factories (Thompson 2010). Canadian research indicates that multi-grade classrooms are a viable effective organizational alternative to single grade classes. The various benefits of multi-grade teaching include peer tutoring, differentiated learning, and innovative teaching. Multi-grade classrooms lead to greater levels of cooperation among students, individualized instruction, and reduced discipline problems. Students feel more integral and teachers understand students as individuals: their interests, their comprehension of ideas, the challenges they face, what gifts they have to offer, and most importantly, their learning styles.

Rather than focusing on standardized testing, we should be acknowledging that schools function to produce capable, literate, caring, engaged and life long learners who are prepared for full participation in a rich community life and satisfying employment.

The educational community has moved on from this mid-twentieth century “bigger is better” view toward embracing the educational opportunities available to students in small, rural schools. The increasing body of evidence indicates that smaller schools are preferred over larger ones. Rural stakeholders believe that small elementary schools offer a better, and safer learning environment for students, an environment less open to bullying and more closely connected to the local community. Studies show that in smaller schools, all students,

regardless of their ethnicity or place on the socioeconomic ladder, tend to achieve higher levels, have a greater sense of belonging, feel safe, are less likely to drop out, and are more likely to participate in extracurricular activities and go to college.

Canadian research indicates that small schools offer the children of rural communities their best chance of success. They appear to be somewhat superior to larger schools in terms of cooperative learning, extra-curricular activities, quantity of school activities, inclusion and mediating the effects of socio-economic status. Rather than closing these schools, educational leaders should be searching for ways to sustain and improve these important rural assets.

The literature also suggests that “the bigger is better” school reforms have severed the links between many rural schools and the needs of their communities. Since small rural schools are interwoven and interdependent with their communities, neither can develop without the other. Many rural schools are the symbol of learning and community identity for many rural communities. Educational officials and policymakers need to give increased attention to the local context if the potential advantages of small rural schools are to be realized.

There is increasing evidence of the value and viability of small rural schools. In addition to their educational benefits, small rural schools are viewed by rural inhabitants as the heart and symbol of learning and community identity within rural communities. A critical argument against school consolidation is the role of the school in sustaining the community both socially and economically. The purpose of many of these studies is to demonstrate that rural educators are working towards the creation of effective learning environments in rural schools and argue that the loss of the small rural schools means the loss of the rural communities. Small rural

schools provide each and every student with unique opportunities for community involvement. Certain researchers suggest the development of school and community relationships and the establishment of networks with various groups including school divisions, higher education institutions and the provincial government in order to contribute to effective learning environments. The industrial and global pattern has depleted the sense of community associated with schooling. The common good, and common unity that used to promote a sense of mutual obligation, social responsibility and belonging in North American Society has been lost. Theobald and Nachtigal advocate for a drastic change in society's public and private choices in order to allow for the production of sustainable, vibrant communities in the future. The major theme of "the Future of Small Rural School Communities" seems to be overshadowed by the themes of declining enrolment and school size, efficiency and economics, and quality education and student achievement. These themes, which correlate to globalized ideals, drive most closure and consolidation initiatives.

Recommendations:

Newton and Newton state that there are choices and alternatives to closures and consolidation. In responding to these challenges, many small rural communities become innovative. These schools can serve as a model for effective practice. Rural schools districts have increased their capacity by thinking outside the box. To capitalize on the creative and innovative nature of small rural schools is to work with other groups within the local community to share and streamline services in order to maintain programs and opportunities for students.

Developing strong partnerships with other agencies such as libraries, township councils and health centers, is beneficial to the viability of the school . Strengthening ties with the local community and parents help to validate the value and viability of these small rural schools.

Value to the Board

The research suggests that School Boards should capitalize on “smallness” and community by recommending a recreation of communities. They should refocus the education agenda on the local context and community and initiatives should be put in place to make the understanding of one’s place (a sense of community) a chief curricular focus in schools, argue that focusing on place will make learning more experiential and more powerful and provide youth with an ability to understand who they are and how they might be in the world. As well, developing a sense of place holds the promise of contributing to the development of meaningful identity, beyond a person’s ability to accumulate material goods. There should be a focus on the creation of viable rural communities as it relates to the rural commitments – sense of attachment to rural places, the relationship between school and community sustainability, proper aims for an education committed to rural community, community engagement in rural schools, and curricula to sustain rural places. This type of school redesign would require teachers to view challenges as a declining school population and multi-use grade classrooms as assets to their school and classroom culture. This environment can foster peer teaching, personalizing the curriculum, differentiation and shared teaching. The People for Education (2008) are beginning to realize that schools are the ideal place to offer the programs, supports, services, and education to their families, children and youth need in their community. The

People for Education argue “Without provincial policy and leadership to provide structure and support for community schools, to integrate schools into municipal planning, and to integrate services for children, youth and families across Municipalities, Ontario will not achieve what has been achieved in other provinces and jurisdiction – schools at the centre of communities, used and valued by the community at large”.

New solutions are needed. Schools can act as viable and thriving hubs for their communities. They can include community centres that stay open after hours and on weekends. Schools can house parenting centres, libraries and health clinics. These communities uses add life to a school and strengthen the community’s sense of connection to their local school.

Strategies to Deal with Declining Enrollment

Declining enrollment is an issue that must be faced by school boards, and all partners in education to ensure Ontario schools continue to be viable, valuable centres for learning.

Four Strategic Activities that can be used by Rural Schools Facing Challenges Such as Declining Enrolment

1. Enrolment based planning – sharing information and opening dialogues
2. Effective partnerships with education and community partners
3. E-Learning and alternative program delivery – important for program delivery in declining enrollment

4. More effective funding formula – more effective in allocating support for boards experiencing declining enrollment and providing incentives for boards to find a better balance between resources and expenditures

Cultivate the community aspect of these small rural schools to encourage dialogue and strengthen partnerships

When parents join together to voice their opinions and concerns on reform efforts, the results are beneficial for small school communities. Research shows that closure and consolidation initiatives are fueled by arguments for declining enrollment and school size, efficiency and economics. Stakeholders who believe in the value and viability of small rural schools tend to recognize the advantages of their small size and importance of cultivating their community identity. The intent of policy makers and educational officials involved in rural school closures is to solve the rural problems – the main problem being declining enrollment, in an efficient, productive and economically viable manner. These factors have been adopted as global ideals. School Board officials argue that the decrease in the board's student population will hinder our capability to provide quality education to students. On the other hand, governmental organizations, such as the Declining Enrolment Working Group, argue that Schools closures and consolidations as a solution to declining enrollment run the risk of losing sight of our main goals as educators, the improvement of student achievement. They view the rural schools as an essential component to a thriving community, and a vital learning centre for their children. Students feel safe and comfortable in these small family-like school cultures.

Parents recognize the school as the hub of the community. The literature suggests that closures and consolidations are detrimental to rural communities across North America.

In 2007, Dalton McGinty's Liberal Government promised \$550 million in funding to save rural schools. Where is that promise?

In the words of Whitney Houston: "I believe the children are our future". Teach them well and let them lead the way.' Life does not get better by chance. It gets better by change, so if you do what you've always done, you'll get what you've always gotten.

I would like to share a story with you. I was at Shopper's Drug Mart last week and I thought, "Oh shoot, I should buy my mom a mother's day card for mother's day; not the dollar store kind, but the expensive \$4.99 ones that have pretty flowers on it and the poetic words by Emily Matthews, which make you cry. I know my mom loves those cards and you just can't get that same sentiment from the "cheap" value Dollar Store card. When I got home, I read the card and I started to cry. This card reminds me of all the teachers, the school, and all of the parents and community and the opportunity that this ARC has given me.

“The Special People in Our Lives”

A Poem by Emily Matthews

*The things special people just naturally do,
make all our lives brighter, and happier, too.
It might be the warmth of a welcoming smile,
or the time someone takes just to visit awhile...*

*It might be the hug
or a heart to heart talk,
a companion whose willing to go for a walk,*

*It might be a favour,
a kind helping hand,
a listening ear,
the words “I understand”.*

They’re all little things, but we know beyond doubt,

Each ones at the heart of what life’s all about.

*You are one of those special people,
who brightens days,
warms hearts,
and brings so much happiness
just by being your own wonderful self.*

The back of the card is what really touched my heart... Whether sharing warm wishes, words of wisdom or the beauty of her poetry, Emily Matthews joy for living inspires an appreciation for what truly matters in life. Her writings have helped people give voice to the words of their hearts. From celebrating special days to expressing gratitude and hope, Emily reaffirms the blessings of family and friends, and the importance of staying connected.

The Last line “the importance of staying connected” really stuck with me, as that is how I feel about how this whole process has actively connected me with this School, the community and the church. I think that is the beauty, the jewel and the blessing of this little school – this \$4.99 card hit home with how I feel about St. John the Evangelist school, not exactly the kind of emotion you can get with the “Value” Dollar store card (aka big box school).

In conclusion, small schools are worth saving, and small schools are worth the cost.

Ministry of Education

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Petition No. 54

Petition relating to Closing St. John the Evangelist school (Sessional Paper No. P-54)
Mrs. Albanese (Tabled March 20, 21, 26, 29, April 3 and 4, 2012)
Mr. Natyshak (Tabled February 27, 2012)

Response:

As the Minister of Education and as a mom to school-aged children, I know first-hand how important schools are to their communities.

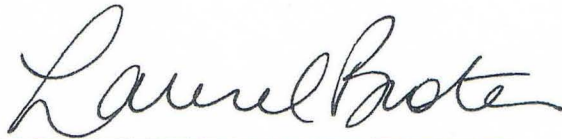
Our government recognizes the need to keep schools viable as vibrant centres of learning for students. However, the circumstances of schools and communities can change over the years, and it is a good management practice for all school boards to step back, from time to time, to review the accommodation needs of their students.

Locally elected school board trustees are responsible for deciding the most appropriate pupil accommodation arrangements for the delivery of their elementary and secondary programs. This is underscored by the *Student Achievement and School Board Governance Act, 2009* amendment to the *Education Act*, stating that a school board's primary responsibility is fostering student achievement and ensuring resources are used effectively, including capital resources.

The Ministry cannot overturn a board decision to close a school. However, ensuring that the concerns of the community are taken into account during these reviews and decision-making processes is an important priority for the government. The Pupil Accommodation Review Guideline was released in 2006 (revised in 2009) to provide a consultation framework for boards to work with their communities to explore the best options to provide students with sustainable good places to learn.

It is my understanding that the Windsor-Essex Catholic District School Board has not made any final decisions regarding Lakeshore Area Accommodation Review and public consultations are on-going. I therefore encourage all concerned citizens to communicate their ideas and concerns to the accommodation review committee and their local school board trustee.

Community participation is critical to making informed decisions about pupil accommodation options and how to best support all students to realize their full potential. Community participation in the accommodation review process can and does affect the decisions made by trustees.

A handwritten signature in cursive script that reads "Laurel Broten". The signature is written in black ink and is positioned above a horizontal line.

Hon. Laurel Broten



Taras Natyshak
MPP Essex



February 22, 2012

Hon. Laurel Broten MPP
Minister of Education
22nd Floor Mowat Block
900 Bay St.
Toronto, ON
M7A 1L2

Dear Minister Broten;

I am writing today to express the deep concerns of my constituents in Woodslee Ontario.

Paul Mullins and the residents are extremely disappointed by the process that has been undertaken to consider the closing of St. John the Evangelist School.

This school is a vital piece of the community and is more than just bricks and mortar. The presence of these children brings this community to life.

My constituents and I believe that rural schools should not be closing. These buildings often also serve as community and recreation centers. Additionally, they can provide community meeting places in areas where these amenities are not readily available. Further, as these community schools close it forces students to be bussed greater distances. This results in less time for study, extra-circular activities, and most importantly time for family.

I'm sure you would agree that having a quality school is also a key factor for sustainability, growth and investment for rural communities.

On behalf of my constituents I strongly urge you to put in place policies that recognize the vitality and necessity of rural community schools, and to keep them open.

Please provide a response directly to Paul Mullins 2299 County Rd 27, Woodslee N0R 1V0. Home Phone - 519-975-4456. Cellular - 519-982-3300. Please send a copy to my Queen's Park Office.

Sincerely,

Taras Natyshak MPP Essex

WHERE DOES THE SMALL RURAL SCHOOL STAND?

EXPLORING DIFFERENT PERSPECTIVES

by

Carolyne Marie Anne Thompson

A project submitted to the Faculty of Education
in conformity with the requirements for
the degree of Master of Education

Queen's University

Kingston, Ontario, Canada

(May, 2011)

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ABSTRACT

The closure of small rural schools is the single most implemented educational change reform in rural areas of Canada (Wallin, 2007). Similarly, throughout the 20th century, rural school consolidation was the single, most frequently implemented educational policy in the United States (Herzog & Pittman, 1995). This study explores the why and how of this phenomenon.

Rural education research has indicated that small rural schools across North America share common challenges unique to the rural situation (Bard, Gardener & Wieland, 2006; Blaine, Pace & Robinson, 2004; Mulcahy, 1993; Wallin, 2007). Many rural education researchers concur that some of these challenges arise from social, economic and political differences between urban and rural settings, but primarily, they stem from the consequence of globalization on trade, labour relations, regulatory control, or governmental rules and guidelines (Howley, 1997; Wallin, 2007). In response to these challenges, many policymakers and educational officials have initiated reform efforts in the form of small rural school closures and consolidations (Bard et.al, 2006; Corbett & Mulcahy, 2006; Hicks, 1999; Wallin, 2007). In this study, I carry out a qualitative analysis of the rationale behind these reforms, using one particular Eastern Ontario school board's proposal (Boundary 2020) and a number of other documents as an exemplification of these closure and consolidation movements, and the various rural stakeholder responses to this reform.

In an exploration of rural perspectives and philosophies, I bring alternative rural perceptions to the forefront and advocate for rural stakeholders to have a voice in the future of their schools and communities. Moreover, by acknowledging not only the existence of small rural schools in Ontario, including the notion that their future is threatened by plans such as Boundary 2020, this project serves as a point of departure for future rural education research in a province that tends to favour a metropolitan-inspired school system. Furthermore, by emphasizing the need to cultivate rural meanings and identities, I hope to encourage rural communities to nurture the strengths of their local schools through the development of locally responsive curricula and community-centered activities and opportunities, which could contribute to the sustainability of their local rural schools.

ACKNOWLEDGEMENTS

Many people were instrumental in the development and completion of this project.

To my advisor and supervisor, Dr. Marie Myers, who enthusiastically aided me in the investigation of a research area that was relatively unexplored in Ontario. As an exceptional mentor, your support and patience have been truly appreciated throughout this sometimes tumultuous journey. Your belief in my plight for the small rural school has made this research possible. To my second reader, Dr. Azza Sharkaway, I thank you for your time, knowledge and direction.

To my husband, whose love and understanding have guided me through this three year venture. You have continued to be proud of my accomplishments even when times were tough. Without your kindness and optimism, I would not have persevered this far. You are truly my rock!

To my family and friends, who have always believed in me and my academic endeavours. Thank you to my family for the many years of intellectual conversation and appreciation for higher education. Your constant encouragement and positive feedback have enabled me to have faith in myself and my successes. Thank you to my friends for lending a kind ear and partaking in the well-deserved rest and relaxation necessary for this lengthy journey.

DEDICATION

This project is dedicated to the students, parents, community members and colleagues, who have truly touched my life and opened my eyes to the situation of rural education in Ontario. Your devotion to your rural community schools is inspiring. Thank you for teaching me about the amazing gifts each and every small school community and their school have to share.

TABLE OF CONTENTS

ABSTRACT.....	ii
ACKNOWLEDGEMENTS.....	iii
DEDICATION.....	iv
TABLE OF CONTENTS.....	v
LIST OF TABLES.....	ix
CHAPTER1: INTRODUCTION.....	1
Rationale.....	2
Significance and Purpose of the Study.....	4
Research Questions.....	7
Definitions of Key Concepts.....	7
Project Overview.....	9
CHAPTER 2: REVIEW OF THE LITERATURE.....	11
Origin and Significance of Research in Rural Education.....	11
Globalization.....	12
Impact on Education.....	13
Impact on the Local Small Rural School.....	15
Situated Cognition and the Importance of Learning in the Localized Context....	17
The Small <i>Rural</i> School.....	19
The Rural Context.....	20
Representations of <i>Rurality</i>	21
Historical Background	22
North American Rural Education of the 19 th and 20 th Centuries.....	22

Recent Trends in Rural Education Research.....	25
Rural Challenges.....	27
Declining Enrolment – The Situation in Ontario.....	28
The Question of Small Rural School Closures and Consolidation.....	30
The Value and Viability of Small Rural Schools.....	34
The Small Rural School Community.....	34
Learning in a Small Rural School	36
Canadian Study.....	36
American Study.....	41
Summary.....	43
CHAPTER 3: METHODOLOGY.....	45
Rationale for the Choice of a Qualitative Approach and Research Method.....	45
Context.....	48
Conceptual Framework.....	49
Methods.....	51
Document Selection.....	52
Boundary 2020 Official Document.....	53
UCDSB Research Article.....	54
Director’s Message – UCDSB Website.....	54
Kingston Recorder and Times Article.....	55
ETFO News Release.....	55
Poem.....	56
Journal.....	57

Semiotic Analysis.....	58
Document Analysis Process.....	59
Themes and Coding.....	59
Summary.....	63
CHAPTER 4: FINDINGS.....	64
Common Perspectives.....	65
Major Themes.....	67
Voices of all Stakeholders.....	69
Summary.....	70
CHAPTER 5: DISCUSSION.....	71
Are All Voices Heard?.....	71
Split Loyalties - Rural versus School Board Commitments.....	72
Parents' Voices.....	75
Teachers' Voices.....	78
Students' Voices.....	83
Whose Voice Counts?.....	86
The Closure and Consolidation Issue	88
Declining Enrolment and School Size.....	88
Efficiency and Economics.....	91
'Quality' Education and Student Achievement.....	94
The Future of Small Rural School Communities.....	97
Recommendations and Alternate Choices.....	106
Summary.....	112

CHAPTER 6: CONCLUSION.....	113
Implications for Future Research.....	113
Limitations.....	116
Concluding Remarks.....	117
REFERENCES.....	121

LIST OF TABLES

Table 1: Themes, Codes and Qualifier Descriptions.....	61
Table 2: Location of Codes and Values in Documents.....	62
Table 3: Values of Codes across Documents – Attitudes toward Reforms.....	65
Table 4: School Closures and Consolidation - Major Themes, Main Arguments and Examples.....	68

CHAPTER 1

INTRODUCTION

In this section, I provide a general overview of the current situation of the small North American rural school. I relate my personal background to the problematic issues uncovered. I then describe the significance and purpose of the study, followed by my research questions and an overview of the project.

To gain a deeper understanding of living and learning in small rural communities, local rural perceptions need to be considered (Blimkie, 2007; Corbett & Mulcahy, 2006; Howley 1997; Wallin, 2007). Many rural education researchers argue that when it comes to perceptions of rural education, local rural voices tend to be silenced and replaced with government and school board discourse advocating for small school closures and consolidations (Bard et al., 2006; Corbett & Mulcahy, 2006; Howley, 1997).

Unfortunately, recent studies in rural education have found that these initiatives come at the expense of local rural schools, which in many cases are the lifeline of their communities. Once these lifelines are severed in the wake of reform movements, the local communities fail to thrive (Corbett & Mulcahy, 2006; Jimerson, 2006; Wallin, 2007). Therefore, researchers need to delve deeper into the world of rural education in order to discover whether these school sites, that government proposals seem to find expendable, are viable and valuable, not only to the local community, but to the local students' well-being and future education. As such, a re-examination of the history of rural educational research, along with an analysis of common misconceptions about the inefficiency and inferiority of small rural schools are necessary, in order to develop a

comprehensive understanding of the existence and significance of rural schools in today's North American society.

Rationale

As an elementary teacher in a small Eastern Ontarian rural school, I observed and continue to observe certain 'challenges' this school faces due to its small, rural nature. These challenges include, declining enrolment, multi-grade classrooms, high teacher turnover rates and schools sharing principals. Within my first year teaching at this school (2006), I was frequently privy to discussions amongst staff, parents, community members and even students regarding these aforementioned issues. Before long, these discussions were fueled by frustration and concern over a possible school closure or consolidation. Upon an investigation of local school board, the Upper Canada District School Board (UCDSB), resources, such as the official website, newsletters and media releases, I learned that the catalyst for this uncertainty and anxiety was a 'system-review,' entitled *Boundary 2020* (UCDSB, 2005). In response to the board-wide issue of declining enrolment, the trustees had directed administration to conduct a single study of all families of schools in Upper Canada entitled *The Five W's and How of Boundary 2020*, (UCDSB, 2007). This proposal sought to justify board-wide school closures, consolidations, program cuts and grade 7 and 8 transfers to high schools under the rhetoric of "program enhancement, consolidation and boundary alignment" (p.1) Guided by the Pupil Accommodation Review Guidelines (PARG) issued to all Ontario school boards by the Ministry of Education in October of 2006, the UCDSB appointed four advisory Accommodation Review Committees (ARCs) to meet throughout 2007 to lead

the public review of school closures and program boundary changes (*The Five W's and How of Boundary 2020*, 2007).

Many teachers, parents, students and community members within the school board region were particularly concerned by the school board trustees' and administrators' perceptions that these small rural schools were a problem to be fixed by a convenient, efficient and educationally beneficial consolidation solution. These rural stakeholders did not perceive this 'solution' to be beneficial to their children or the viability of their towns. Conversely, they shared a fear that these consolidation, closure and grade 7 and 8 transfer 'solutions' would have potentially harmful implications for the future viability of their towns (Carson, 2007; Elementary Teachers' Federation of Ontario, 2007; Lunman, 2008; People for Education, 2008; Thompson, 2010). Therefore, in response to this 'system-review,' many parents and community members attempted to voice their disapproval and petitioned against the Boundary 2020 initiative. They used various outlets to voice their opinions such as attending ARC meetings and writing letters to the director of the UCDSB (Lunman, 2008; Thompson, 2010). One particular parent felt so passionate about the possible negative consequences of a school closure or consolidation that he wrote a poem voicing his point of view on local small rural schools and government intervention (Carson, 2007). This poem, as well as other responses to Boundary 2020 will be investigated as part of my document analysis (Chapter 3) and elaborated upon in my findings and discussion sections (Chapters 4 and 5).

As my personal experience has indicated, having taught in this climate of educational transitional uncertainty, whereby small rural schools are perceived as sites of disdain in the eyes of educational officials (DeYoung, 1987), I became interested in

further exploring the current situation of small rural schools across North America in order to relate this local problematic to other small rural schools facing similar circumstances. Thus, for the purpose of my study, I chose to begin my research by conducting a broad investigation of the topic of rural North American education. I then narrowed my search, focusing specifically on the common issues small rural schools in Eastern Ontario face and the administrative response to these issues, namely school closures and consolidations.

Significance and Purpose of the Study

Though North American educational policymakers do not deny the existence of small rural schools (Bard, Gardener & Wieland, 2006), in an educational climate where standardized, globalized conceptions of schooling overrule local rural priorities, small rural schools continue to be viewed as inefficient, uncoordinated and outdated. As such, in terms of meeting the set standards of what schooling should look like (i.e., appropriate class sizes, single grade make-up etc.), these small schools are perceived as expendable against the ‘bigger is better’ and ‘one size fits all’ mentality of the urban scholar (Bard et al., 2006; DeYoung, 1987; Howley & Howley, 2004; Wallin, 2007). Therefore, many rural schools in North America, such as those previously mentioned in the UCDSB, face possible closure or consolidation due to school ‘improvement’ initiatives (Corbett & Mulcahy, 2006; Jimerson, 2006). It appeared that rural education studies conducted in the United States have found that rural school consolidation was the single, most frequently implemented educational policy of the 20th century (Herzog & Pittman, 1995). Similarly, recent Canadian studies have indicated that small rural school closure has become the number one reform effort in Canada (Wallin, 2007). Specifically in Ontario,

as student enrolment continues to decline across the province, school boards continue to adopt the common perception that fewer, larger schools would be fiscally efficient and enhance quality education by providing increased curricular and extra-curricular opportunities for students (Declining Enrolment Working Group, 2009; McWilliams, 2008).

I have great difficulty accepting this ‘one size fits all’ perception as the norm because as Howley and Howley (2004) argue, it tends to disregard the importance of context in reform decisions and continues to treat all educational settings as the same, whether rural, urban or suburban, thus embarking on a quest to implement universalized reform efforts and change regardless of the local contextual, and social and educational factors. Moreover, these rural circumstances are worsened by the fact that for the most part, rural stakeholders were not invited to share their perceptions regarding reform efforts (Howley, 1997). As their perspectives continue to remain unheard, Giroux and McLaren (1990) are concerned that small rural schools will continue to be marginalized through a structured silence. In other words, as rural stakeholders’ perceptions of the value and viability of their schools continue to be suppressed by policymakers’ and educational officials’ perceptions of a ‘one-size fits all’ solution to the small rural school ‘problem,’ small rural schools will continue to be expendable. This situation is increasingly problematic for the viability of small rural communities and community-centered learning.

On the other hand, recent American journals such as the *Rural Educator* and the *Journal of Research in Rural Education* have been established with the intent to publish studies that examine rural school challenges from a rural perspective. Furthermore,

various contemporary Canadian studies have been conducted in the field of rural education, primarily to emphasize the need for future research on the impact of consolidation efforts on rural lifestyles and priorities (Blimkie, 2007; Corbett & Mulcahy, 2006; Wallin, 2007). In addition, certain rural education annual conferences have been established with the intent to bring rural stakeholders together in an environment where they might share opinions and perspectives on the current situation of rural education. These conferences include: the annual National Congress on Rural Education in Saskatoon, Saskatchewan (www.usask.ca/education/ruraled/); the 2006, 2007 and 2008 Rural Education Conferences held in British Columbia (www.learnnowbc.ca/educators/rural_education/conferences.aspx) and the annual Rural Education and Small Schools Conference in Manhattan, Kansas (<http://coe.k-state.edu/cress/conference.html>) . Though rural education research and discussions demonstrate increasing concern for the sustainability of many small rural schools, these viewpoints are rarely considered in school reform agendas (Bard et al., 2006; Barley & Beesley, 2007; Corbett & Mulcahy, 2006).

The overall purpose of this study is to discover where the small rural school stands with regards to reform agendas. First, the intent is to understand the rationale behind small rural school closure and consolidation, by examining one particular school board reform initiative, Boundary 2020. Second, this study explores local, rural perceptions that challenge the common perceptions amongst policymakers and educational officials regarding the future or lack thereof of small rural schools. Third, by uncovering these conflicting perspectives, the aim is to demonstrate the need for further research into this relatively unexplored phenomenon as well as encourage educators to

foster educational developments and curricular plans that take into account rural meanings and identities.

Research Questions

Through a thorough examination of a number of pertinent studies and documents, I have sought to answer the following research questions:

- What is the intention and rationale of policymakers and educational officials involved in rural school closures and consolidations?
- What are the shared perspectives of rural students, parents and community members regarding school closures and consolidations and the value and viability of their small rural schools?
- What are the effects of small rural school closures and consolidations on local rural communities?

Definitions of Key Concepts

Many North American rural researchers concur that much ambiguity exists about what constitutes *rural* and *rurality* (Blaine, Pace & Robinson, 2004; Chalker, 1999; Howley, 1997; Wallin, 2007). Most American studies reviewed for this study define *rural* as the open country and small settlements of less than 2500 people that are not in the vicinity of the densely populated suburban areas known as urban clusters (Barley & Beesley, 2007; Beeson & Strange, 2003). Statistics Canada has developed various definitions of the term *rural*. In relation to research in rural education, Statistics Canada recommends the use of the *rural and small town* definition: individuals living in towns or municipalities outside the commuting zone of larger urban centres of 10,000 or more people (de Plessis, Beshiri, Bollman, & Clemenson, 2001).

Recent studies conducted in Ontario regarding declining enrolment have taken the term *rural* as it relates to education one step further and sought to define the *rural school*. In March of 2009, The Ministry of Education of Ontario's Declining Enrolment Working Group identified a *rural school* in one of two ways: the second character of the school's postal code is zero, indicating that the school's address is defined as rural by Canada Post or the school is listed as a rural school by the provincial Grants for Student Needs (GSN) regulation (Ontario Ministry of Education, October 2008, p. 88 as cited in Declining Enrolment Working Group, 2009). In terms of a definition for my research site, I have employed the Declining Enrolment Working Group (2009) definition of the *rural school*.

In addition to the importance of exploring the concept of *rural* when discussing rural education, for the purpose of my research context, it is imperative to investigate the notion of *small* in terms of the *small rural school*. The research on rural education indicates that most rural schools are characteristically *small* (Corbett & Mulcahy, 2006; Howley & Howley, 2004). Moreover, smaller school populations increase the chances for a multi-grade classroom organization (Mulcahy, 1993). Thus, when exploring the issues common to many rural schools such as declining enrolment, an increase in split or multi-grade classes, high teacher turnover rates and schools sharing principals, the literature is often based on multi-grade classes in small rural schools.

As Howley and Howley (2004) explain, when discussing *smallness* in terms of schooling, this term is relative. The literature indicates that various studies have deliberately avoided an absolute definition of small in relation to schooling, with the intent to consider a wider range of research findings to investigate the characteristics of small schools (Jimerson, 2007). However, with respect to this study, *small schools* have

included elementary schools with less than 300 students and high schools with less than 800 students.

As previously outlined, most studies investigating the future of small schools tend to discuss reform efforts, namely school closures and consolidations. Bard et al. (2006) explain that historically, school *consolidation* has been a way to solve rural issues in the eyes of policymakers and educational officials. They explain that a variety of terms exist to describe the consolidation process. Some scholars define *consolidation* as the merging of two or more attendance areas to form a larger school, whereas others view *consolidation* as combining two or more previously independent school districts into one new, larger district. However, Bard et al. (2006) ascertain that most community members perceive *consolidation* to be any type of school unification, reorganization, or merger. For the purpose of this project, the term *consolidation*, for both American and Canadian rural contexts, will refer to this latter definition. As such, later discussions of UCDSB grade 7 and 8 student transfers to local High Schools will also refer to *consolidation*.

Project Overview

In this chapter, I have outlined my interest in and personal connection to small rural school closures and consolidations. I have described the rationale for this study as it relates to my background knowledge of small rural schools. Following an outline of the significance and purpose of my study, I have listed the research questions that have guided my inquiry and provided the reader with definitions of key concepts. The remainder of this project is divided into six chapters. In Chapter 2, I offer a review of the literature, including the impact of globalization on education, the correlation between situated cognition theory and learning in a localized context, the history of rural

education and recent trends in small rural schools. In Chapter 3, I outline the methodological approach adopted for my study as well as explain my choice of site and conceptual framework. I describe the methods used to collect and analyze data. I present the findings from my data analysis in Chapter 4. In Chapter 5, I discuss my findings as they relate to the various contrasting perspectives of school officials and small rural school stakeholders and their impact on the future of small rural schools. In Chapter 5, I also provide alternate choices and recommendations. In Chapter 6, I discuss implications for future research, limitations and include concluding remarks.

CHAPTER 2

REVIEW OF THE LITERATURE

In this chapter, I begin by outlining the origin and significance of the research in rural education reviewed for this project. I then theoretically ground my research with a brief discussion of the way both globalization and the theory of situated cognition relate to the fate of North American small rural schools. Following a brief overview of the rural North American context and representations of *rurality*, I explore the history of research in rural education and the rise of the consolidation movement. I then discuss the recent trends in small rural schools, including the primary issue of declining enrolment. The chapter concludes with an investigation of recent studies that have been conducted to explore the benefits of small rural schools on student learning, school culture and the local surrounding community.

Origin and Significance of the Research in Rural Education

Prior to an analysis of the following rural education research, I draw attention to the origin and significance of the literature. First, although the research is equally American and Canadian-based, most empirical Canadian studies regarding small rural schools have been conducted in Saskatchewan, Manitoba, Alberta and Newfoundland. These provinces may have a shared recognition for research in the field of rural education because the rural population of these provinces comprises a large percentage of their total populations (Statistics Canada, 2001). Nevertheless, the fact that the other Canadian provinces do not acknowledge the existence of rural education is troublesome. In Ontario, for instance, the scarcity of rural education research is suggestive of a shortage

of small rural schools throughout the province. However, my personal experience teaching and visiting numerous small rural schools in Ontario coupled with the recent literature on declining enrolment in rural school districts throughout Ontario (Declining Enrolment Working Group, 2009; McWilliams, 2008; People for Education, 2008) discards this assumption that small Ontarian rural schools are scarce and indicates, rather, the existence and vulnerability of rural schools in Ontario. Second, within the research reviewed, the rural contexts vary in terms of characteristics, demographics and geography. Therefore, just as we need to appreciate the importance of context and specific local situations when planning school 'improvement' initiatives, Beeson and Strange (2003) note, there is no single agenda for rural education that is universal to all provinces and states.

Globalization

In 1985, economist Theodore Levitt coined the term *globalization* to describe changes in global economies affecting production, consumption and investment (Spring, 2008). Theorists in the field of globalization, such as Spring (2008) and Stromquist (2002) argue that although Levitt's definition captured the vast economic and financial changes affecting production, consumption and global investment, it did not grasp the various social and cultural effects of globalization. Consequently, in the past two decades, extending beyond Levitt's original financial and economic scope, the concept of globalization has been analyzed in the fields of sociology, education and anthropology (Anderson-Levitt, 2003; Stromquist, 2002).

Recently, theorists have described the term *globalization* as the growing mobility of goods, services, people and ideas across countries (Anderson-Levitt, 2003; Carnoy,

2000; Spring, 2008; Stromquist, 2002). Anderson-Levitt (2003) describes this process as a 'global flow' of ideas, practices, institutions and people across the world in an unprecedented volume.

Impact on Education

As practices, institutions and ideas have been shared and transferred amongst various countries and cities, Anderson-Levitt (2003) explains that the mobility of educational practices and ideas and the institution of schooling has followed suit. As such, over the past decade, certain globalization theorists have studied the relationship between globalization and education. These theorists concur that formal education is the most commonly found institution and most commonly shared experience of the contemporary world. Thus, from this standpoint, formal schooling is viewed as a common global phenomenon (Carnoy, 2000; Spring, 2008; Stromquist, 2002).

Carnoy (2000) asserts that an analysis of the concept of globalization requires an acknowledgment that two of the main bases of globalization, information and innovation, are highly knowledge intensive. In other words, through information industries and global markets, knowledge is portable and thus lends itself easily to globalization. Therefore, Carnoy argues that if knowledge is fundamental to globalization, globalization should, in turn, have a profound impact on the transmission of knowledge and specifically on the delivery of education. As such, he suggests that theorists examine how globalization and its ideological packaging affect the overall delivery of schooling.

In his discussion of globalization and educational reform, Carnoy highlights the major impacts of globalization on education that are common in many contexts. First, in financial terms, the rise of globalization has pressured governments to reduce the growth

of public spending on education and find other sources of funding, such as privatizing education, for the expected expansion of their educational systems. Second, in labour market terms, the shift of economic production to knowledge intensive products and processes has led to a worldwide demand for certain kinds of skills (i.e., mathematical, scientific and technological), which in turn results in an increase in payoff to higher levels of education. As such, governments are pressured to expand their higher education and correspondingly increase the number of secondary school graduates applying for postsecondary institutions. Third, in educational terms, the quality of national educational systems is increasingly being compared on an international scale. As such, school quality is related to interschool competition and school accountability. Consequently, school systems around the globe continue to place an emphasis on math and science curricula, standardized testing and meeting standards by changing the overall delivery of schooling (Carnoy, 2000).

Stromquist and Monkman (2000) discuss the many repercussions that globalization has had on formal schooling in North America. First, the corporate criteria of 'efficiency' and 'productivity' have extended to the world of schooling and are manifested in quantitative measurements of student performance, such as standardized tests. The results of these tests are then used to 'improve' educational efficiency (Carnoy, 2000; Stromquist & Monkman, 2000). Second, the focus has shifted from a child-centered curriculum to economy-centered vocational training. As such, students are no longer learning for the sake of learning, but being educated to be trained to later enter the public workforce. Third, education is losing its ground as a public good and is becoming another marketable commodity. Thus, students are being educated as human

capital. In accordance with this line of thought, Eisner (2005) argues that many perspectives on the purpose of education tend to focus on a broad education of citizens, instead of the unique learning experiences of the individual. Fourth, globalization has led to a reduction of teachers' autonomy, independence and responsibility, whereby workplace knowledge and control are in the hands of administration (Stromquist & Monkman, 2000). Therefore, educators have lost the right to determine what is taught and how to evaluate its merit. Furthermore, in relation to curriculum delivery, Stromquist and Monkman argue that in North American education today, the global trend toward privatization and decentralization has had the following consequences on the delivery of schooling: a neglect of fields less connected to the market, such as history and the arts; a rejection of pedagogies less linked to the market, such as critical theory, for market-driven instruction, such as logical problem solving; a disregard for issues of equality and equity, in terms of women and ethnic minorities, for consideration of efficiency, such as performance and quantitative test scores.

Impact on the Local Small Rural School

As the previous section has outlined, globalized conceptions of schooling have impacted educational situations around the globe. According to Anderson-Levitt (2003), rather than diverging into unique learning situations, many schools are converging toward a single global model. Various researchers in the field of rural education (Howley, 1997; Wallin, 2007) find this conformity problematic for the future of school systems. Howley voices his concerns by stating:

Public school curricula and practices do look remarkably similar worldwide and this fact ought to disturb educators more than it apparently does. Educators, after all, have a vested interest in the institutions of cultural transmission. When

practices are so similar to one another worldwide, we ought worry about the health of global culture overall. (Howley, 1997, p.1)

In some cases, Eisner (2005) explains, this globalized way of thinking, which includes educational competitiveness, has led to educational change under the rhetoric of ‘improvement’ and ‘reform.’ The uncertain fate of small rural schools, for instance, provides a localized example of the conflict between globalized agendas, such as small rural school consolidation in the name of efficiency and productivity, and local, rural priorities and values, such as community learning in community schools. Following this line of thought, American rural researchers, DeYoung and Howley (1990) suggest differentiating between schooling and schools in order to make a distinction between globalized conceptions of schooling and various unique school situations. They define *schooling* as an attempt at systematic instruction of predetermined bodies of knowledge and *schools* as important places in which people construct a social reality. The term schooling seems to regularly coincide with globalized education and nationalized curricula, whereas the term school is usually associated with local meanings, interests and cultures. This distinction relates to small rural school reform, in that schooling improvement initiatives are driven by the logic of globalization, which in turn leads to a disregard of the diversity of rural places and rural schools. In the same respect, local rural issues and dilemmas are often obscured by national and cosmopolitan practices (Howley, 1997). Thus, it is imperative to investigate living and learning in a local rural community from a localized lens. In order to do so, I have drawn upon the theory of situated cognition, which emphasizes the contextual nature of learning.

Situated Cognition and the Importance of Learning in the Localized Context

For the past three decades, leading educational psychologists and sociologists have questioned the cultural commonsense about knowing and being, which is traditionally based on the view that proposes that learning is a naturally occurring, specific kind of cognitive functioning, separate from engagement in doing something (Lave, 1997). Lave terms this theory of learning as the ‘culture of acquisition.’ Situated cognition theorists, such as Lave, Wenger, Olson and Gee, have moved beyond the ‘culture of acquisition’ and adopted positions that seek to better reflect the fundamentally socio-cultural nature of teaching and learning (Gee, 1997; Lave, 1997; Lave & Wenger, 2001; Olson, 2003). These theorists adhere to the theory of ‘understanding in practice,’ which proposes that the processes of learning and understanding are socially and culturally constituted and what is to be learned is integrally implicated in the medium in which it is appropriated (Lave).

Situated cognition is based on the premise that mind, meaning and learning are situated and socio-cultural in nature (Gee, 1997). This theory stresses the influence of the social and physical contexts upon thinking and learning, whereby thinking becomes a practical activity which is adjusted to meet the demands of the situation (Barton & Hamilton, 2005; Behrman, 2002). Therefore, learning entails lived practice in a particular context, such as a local rural community context would (Kirshner & Whitson, 1997). Moreover, concepts change in various contexts and are thus seen as fluid and they can be adapted to various situations (Gee, 1997).

With regards to a classroom setting, these theorists are concerned with interpersonal dynamics and collective activity. Therefore, teaching the curriculum is not a

matter of mechanically transferring knowledge to the student who receives the information objectively. Rather, knowledge is intertwined with the social and physical contexts of activity and learning occurs through active participation in a community of practice (Kirshner & Whitson, 1997; Lave & Wenger, 2001; Lemke, 1997)

In a situated approach to learning, cognition is collective, thereby defined by joint intentionality, shared assumptions and common sense in established communities of practice. Situated cognition, thus recognizes individuals in all their complexity, while crediting the intrinsically social nature of cognition and learning (Davis et al., 2008; Kirshner & Whitson, 1997; Rubenstein-Avila, 2003). From this perspective, for a student, the curriculum can signify the possibility to make sense of his/her own life-world. In other words, the student becomes open to the world, eager to give it meaning and able to recreate or generate the materials of a curriculum in terms of his/her own consciousness (Olson, 2003). In addition, Olson stresses the need for shared intentionality where teachers and students together negotiate the curriculum.

Focusing on the contextual nature of learning, the situated cognition viewpoint advocates for a self-reflective school culture. This perspective takes as its central premise the idea that learning and development occur as people participate in the socio-cultural activities of their community, which results in a transformation of their understanding, roles and responsibilities. Within this model, students learn information as they collaborate with other students and adults in carrying out activities with purposes connected explicitly with the history and current practices of the community.

In small rural schools, students are able to cultivate rural meanings and identities, by engaging in locally responsive curricula and community-centered activities and

opportunities. Regardless of the unique socio-cultural nature of learning in small rural schools, these places are still being targeted by globalized agendas of school officials to close and consolidate them. In order to understand this phenomenon, it is imperative to examine the nature of small rural schools in terms of their shared rural context, history and challenges.

The Small *Rural* School

Despite the global drive for larger, business-like schools, in both Canada and the United States, there has been a rise in the urban ‘small schools’ movement. Corbett and Mulcahy (2006) stress the many small school initiatives sponsored by the Bill and Melinda Gates foundation. However, Howley and Howley (2004) caution that the prescriptive literature on urban ‘small schools’ and the push for reform initiatives to personalize huge city schools by creating ‘schools within schools’ are *not* synonymous with small *rural* school literature and initiatives. Thus, it is imperative to reiterate that this project focuses on the situation of small *rural* schools across North America.

Howley and Howley (2004) make the distinction by arguing that while small *urban* school movements push for the creation of these schools, most small *rural* school reform movements are one and the same with closure and consolidation movements, thus destroying these small rural schools.

Most research on rural education discusses schools in rural, sparsely populated areas as characteristically small (Chalker, 1999; Corbett & Mulcahy, 2006; Newton & Newton, 1992). Thus, although certain studies may not explicitly use the term *small*, (Cotton, 1996; Newton & Newton, 1992), Newton and Newton (1992) state that smallness is a positive feature of many rural schools. As such, the literature reviewed for

this project focuses on the past, present and future of *small* schools in *rural* contexts.

Prior to an exploration of the history of small rural schools, it is important to review the population dynamics of the North American rural contexts as well as representations of *rurality* in order to contextually and conceptually set the stage.

The Rural Context

Throughout the 20th century, due to the rise of industrialization and urbanization, North America experienced a steady decline of its rural population. In 1901, 63% of Canadians lived in rural areas (Statistics Canada, 2001), whereas, in 2006, the rural population percentage varied between 19% and 30%, depending on the definition of rural. However, in 2006, upon an analysis of the urban and rural population statistics, Bollman and Clemenson (2006) described the overall picture as a growth in the rural population of Canada, and most of this growth was taking place in areas adjacent to larger urban centres. Nonetheless, rural population growth has been minimal in comparison to urban growth. As a result, the rural share of Canada's total population continues to decline. Furthermore, rural population growth and decline differ between provinces. In Ontario, for example, from 2001 to 2006, the rural population increased by 3.5 percent (Bollman & Clemenson, 2006). However, this was possibly due to a new definition of rural which included areas outside the commuting zone of larger urban centres. In addition, researchers suggest that the ambiguity of the term *rural* may contribute to discrepancies amongst North American rural population statistics (Chalker 1999; Howley, 1997).

In the United States, the rural population decreased from 60.4% in 1900 to 24.8% in 1990 (U.S. Census Bureau, 1990). In terms of the educational context, American

researchers have conducted quantitative studies regarding the existence of rural schools and determine that 21% to 40% of American school children can be classified as rural, depending on the definition employed (Beeson & Strange, 2003; Blaine, Pace & Robinson, 2004). In Canada, on the other hand, researchers have yet to measure the percentage of students attending rural schools. The lack of statistics associated with rural Canadian students is an indication of the scarcity of rural education research in certain Canadian provinces. Moreover, Herzog and Pittman (1995) argue that the lack of a definitive understanding of the meaning of the term *rural* is problematic for the future of rural education.

Representations of Rurality

Howley (1997) explains that in addition to the ambiguity surrounding definitions of *rural*, most researchers view *rural* in as the binary opposite to *urban*. This perception is evident in definitions such as the aforementioned Statistics Canada definition (dePlessis et al., 2001), where rural areas are identified using terms like *outside* or *close to* large urban centres. Howley cautions that defining rural areas simply by their geographical relation to urban areas can result in an othering and marginalization of rural places and people. Herzog and Pittman (1995) and Giroux and McLaren (1990) share Howley's concern that *rural* perceived from an urban viewpoint often leads to negative stereotypes associated with rural inhabitants, such as "country bumpkins," "hillbillies" and "hicks" (Herzog & Pittman, 1995, p. 113).

Howley (1997) calls for a move beyond the dominant urban, cosmopolitan perspectives of what constitutes *rural* toward an exploration of *rurality* from the rural perspective. Howley argues that in order to gain a deeper understanding of rurality, one

must recognize that a rural area is not identified by its boundaries, but rather the rural meanings inherent in the lives of the rural inhabitants (Howley, 1997). In this project, I have used Howley's notion of exploring rurality from a rural perspective as a conceptual lens with which to critically analyze the stated position of educational officials regarding the past, present and future of small rural schools, including the consolidation movement and responses to recent trends in rural education (i.e., enrolment issues), as well as to explore the rural stakeholders' responses to this position.

Historical Background

North American Rural Education of the 19th and 20th Centuries

In the late 19th century, most school reform literature was based on an emerging industrial, urban and progressive North America (Corbett, 2001; DeYoung, 1987). In Canada, industrialization in the 19th century brought about rapid social change which instigated the 'Canadian Educational State' (Curtis, as cited in Corbett, 2001). The aim of this educational project was to shape children personally and collectively into uniform social subjects. Thus, the state began creating schools where students would be fitted for 'roles' in 'society' and learn a standardized curriculum (Corbett, 2001). This standardized, industrialized view of education was equally present in the United States, where the previously established one-room rural schools were considered to be uncoordinated and outdated in contrast to this new, modernized view of schooling (DeYoung, 1987). Scholars believed rural schools to be populated by cognitively deficient students because rural students were achieving lower scores on early standardized tests. Consequently, small rural schools were labeled not only as less desirable administratively and financially, but less intellectually stimulating (DeYoung,

1987; Howley, 1997). Howley (1997) states that “from 1910 to 1965, education was part of the march of progress toward an inevitably better future--a progressive, postwar, and increasingly post-rural future” (p. 2). As such, a dominant colonial binarism was being reproduced through urban versus rural discourses, whereby rural schools were perceived as uncivilized, archaic and inefficient against the civilized, modern and efficient urban schools. Thus began the othering of rural people and places, to which Howley (1997) refers. Consequently, American policymakers and administrators of the early 20th century targeted small rural schools for upgrading, reform and improvement. As a result, one-room schools of the early to mid-20th century were replaced by fewer, larger schools in the name of progress and modernization (Cotton, 1996; DeYoung, 1987; Giroux & McLaren, 1990).

By the mid-20th century, in the United States, policies advocating for an urban, centralized model of education were coupled with discussions of appropriateness of size. For instance, James Conant's book *The American High School Today*, published in 1959, proposed that in order to increase cost effectiveness and offer large and varied curricula, a high school needed to have at least 100 students in its graduating class. Cotton (1996) argues that this book contributed to the acceleration of the momentum of the consolidation movement. Conant (1959) piloted the idea that successful, efficient schools needed to be large, corporate-like schools. Conant claimed that small high schools were a grave problem for the future of education and advocated that policymakers and administrators make the elimination of these schools their top priority. Cotton (1996) ascertains that school administrators and policymakers engaged in this one-size-fits-all discourse to demonstrate their commitment to the forces of progress and modernization

of the 1950s. In addition to this mentality, Bard et al. (2006) argue that the American political climate of international competitiveness of the mid 1900s also contributed to the flourishing of consolidation efforts. The Cold War and Sputnik created increased concerns that small high schools, many of which were rural, were not developing the human capital needed for national security. Believing that professionals knew better about educating children, policymakers and educational officials were more interested in centralizing control rather than leaving decisions to members of a local community. DeYoung and Howley (1990) elaborate upon this notion of students as human capital by arguing that by the 1950s, modern views of schooling advocated a view that children were human resources, and as such they were useful for economic development. In line with this thinking, small rural American schools began to be consolidated into larger, one-size fits all schools, where students were seen to be educated for human capital (Bard et al., 2006; Sergiovanni, 1996). As a result, the rural community situation continued to dwindle with this great acceleration of the closure and consolidation movement (Theobald & Nachtigal, 1995).

In terms of the Canadian rural context of the late 19th and early 20th centuries, as previously noted, various Canadian historians agree that the history of North American education was primarily urban. In Canada, rural history was simplified and presented as a backdrop for the 'real' history of the development of a modern urban, industrial nation (Corbett, 2001; Sandwell, 1994). Furthermore, amidst the 'bigger is better' mentality of the urban North American scholar and the notion that students should be educated to fit roles in society, contextual differences between urban and rural schooling were often obscured (Corbett, 2001; DeYoung, 1987). As such, DeYoung (1987) argues that

research in rural education of the 19th and 20th centuries was not only sparse, but ideologically motivated by the urban scholar discourse. However, one Canadian researcher questions this position and offers a different perspective regarding the actual situation of rural Canada at this time in history (Corbett, 2001). Corbett explains that various parts of rural Canadian geography were not institutionally penetrated by the state until the late 20th century. Although formal education entered the rural communities of southern Ontario in the 19th century, many rural communities in parts of Canada such as, Northern British Columbia and Northern Ontario remained independent from industrialization, urbanization and formal education until the late 20th century. As the local culture and community continued to develop within these areas, attending high school was secondary to joining the local labour force (Corbett). Therefore, although progressive education and standardized schooling infiltrated the rural United States throughout the 19th century, this view did not reach various rural Canadian communities until the late 20th century. Corbett concludes that the history of Canadian rural education is diverse and requires further investigation in order to paint an accurate picture of the rural schooling context of the 19th and 20th centuries.

Recent Trends in Rural Education Research

In the United States, in the late 20th century, a new focus on rural education surfaced among American educational researchers (DeYoung, 1987). This research was pioneered by Sher (as cited in DeYoung), who upon an historical policy analysis, argued that the rise of industrialization of the 19th and 20th centuries served as a catalyst for an urban, centralized model of education that arose at the expense of the small rural school. Sher discovered that urban policymakers of the past had limited knowledge of rural

meanings and identities, let alone the value of small rural schools. Therefore, he argued that the so-called efficiency of rural school consolidation and reorganization agendas was a myth (DeYoung, 1987). DeYoung and Howley (1990) concur that a critical analysis of the history of rural education demonstrates that the factors driving the small rural school consolidation trend of the early to mid 20th century were rooted in the North American sociological and political situation of the 19th and 20th centuries. This societal situation, rooted in early industrialization and urbanization movements and then a rise in globalization, contributed to the perspective of advocating for a ‘bigger is better’ or ‘one size fits all’ model of schooling, which catered to the consolidation ‘solution.’ As such, for many decades of the 20th century, school *consolidation* was considered synonymous with school *improvement*, despite the fact that there was little to no evidence to support this assumption (Corbett & Mulcahy, 2006).

Sher (as cited in DeYoung, 1987) was not only a pioneer for research in rural education of the 21st century, but among the first theorists to engage in an alternative to the ‘bigger is better’ and ‘one size fits all’ models of schooling, which catered to rural school depletion and urban school proliferation. Bard et al. (2006) ascertain that Sher was not alone in his plight for the small rural school. These researchers explain that, throughout the 19th and 20th centuries, although rural perspectives were usually overruled by the urban, centralized model of education, the closure and consolidation of small rural schools has nonetheless been a controversial topic for policymakers, school administrators and rural communities since the late 19th century (Bard et al., 2006). In terms of the Canadian context, Corbett (2001) argues that many rural communities of the 19th and 20th centuries resisted standardized schooling due to its urban bias. Therefore,

although the history of Canadian education is seemingly urban biased, many centralized, formal models of schooling met resistance from rural communities. Therefore, the American historical literature tends to focus on progressive education closing or consolidating the previously established rural schools or one-room school houses of the 19th and 20th centuries, whereas the Canadian literature explains resistance to the penetration of standardized schooling in rural communities.

In the late 20th century and early 21st century, the research on rural education has increased. With researchers such as Howley, Corbett and Mulcahy, and Jimerson, the small rural school situation has been exposed to the public. Moreover, researchers have found recent trends in the area of rural education, including challenges common to small rural schools; the primary challenge being declining enrolment.

Rural Challenges

The literature on small rural school consolidations and closures indicates that many rural areas in North America face a number of challenges that impact on educational decision making. These challenges include declining enrolment, lack of special needs funding, declining economic and social circumstances, a prevalence of multi-grade classes, out-migration, teacher surpluses, high teacher turnover rates and schools sharing principals. Although each small rural school context is unique, recent studies have indicated that many rural schools across North America share any number of these common obstacles (Blaine et al., 2004; Corbett & Mulcahy, 2006; McWilliams, 2008; Mulcahy, 1993; Newton & Newton, 1992; Wallin, 2007). When investigating the challenges that many small rural schools share, it is imperative to take a moment to examine the ‘issue’ of declining enrolment, as it is not only the primary rural challenge

that most Canadian small rural schools face (Bard et. al., 2004; Wallin, 2007) but the lead reasoning for closures and consolidations across Ontario (DEWG, 2009).

Declining Enrolment – The Situation in Ontario

In 2006, the Canadian Council on Learning put forth the School Enrolment Trends in Canada for the past decade. According to Statistics Canada's figures for that time period, the Council ascertained that Canada's elementary and secondary school enrolments fell by 1.2% between the 1997 and 2004, and further declines were anticipated over the next few years as the school-aged population was predicted to continue to shrink. The Council found that although there was interprovincial variation in the pattern and extent of change, most provinces had experienced a steady decline in kindergarten to Grade 12 enrolments between 2000 and 2006. Initially, Ontario had proven to be an exception, with an increase in enrolment between the late 1990s and the 2003 school year. However, even this province's enrolment dropped sharply when Ontario's Grade 13 or OAC was eliminated (Canadian Council on Learning, 2006). In the 2008 Annual Report on Ontario's Public Schools, the People for Education reported that between 2002 and 2008, overall enrolment in Ontario elementary and secondary schools had declined by nearly 90,000 students. Moreover, in their report on the planning and possibilities of declining enrolment in Ontario, the Declining Enrolment Working Group (2009) stated that the Ministry of Education expected a similar trend between 2009 and 2013. The Ministry anticipated that the number of students in the public education system would decrease by a projected 72,000 or 3.8% by 2013.

In addition to the interprovincial variations reported by the Canadian Council on Learning (2006), enrolment patterns also vary amongst school boards within a particular

province. Moreover, for the purpose of this project it is important to note that the steepest declines were and are occurring in small, rural and remote school boards (Canadian Council on Learning, 2006; Declining Enrolment Working Group, 2009). On a similar note, in the People for Education's Annual Report on Ontario's Public Schools (2008), it was reported that Ontario's rural and remote school boards had faced extreme declines in enrolment due to a combination of birth rate declines and migration to urban and suburban areas.

Although migration patterns influence variations in local trends in enrolment, such as the fact that over 50% of Canada's immigrants choose to settle in Ontario, the Canadian Council on Learning found that the overall, Canada-wide decline in enrolments is the result of demographic changes. In particular, the last of the echo boomers, which are described as the large group of children born to the baby boomers between 1980 and 1994, have completed their elementary and secondary schooling experience. The children of the next generation are part of a much smaller group. Therefore, the Council argues that the fact that there are not as many school aged children in Canada as there were a few years ago, presents both challenges and opportunities for Canada's elementary and secondary schools (Canadian Council on Learning, 2006)

In the 1970s and 1980s, the steep decline in student enrolment brought about challenges such as, school closures, teacher layoffs, hiring freezes, and service reductions. Recently, however, the Council has found that the challenges posed by declining enrolment on a national scale are somewhat different from the past. These challenges include: funding, program delivery and staffing. Research has shown that in Ontario, there remains evidence of an increase in school closures (Canadian Council on

Learning, 2006). According to data compiled by People for Education (2008), the rate of school closures in Ontario has doubled in recent years. In her discussion paper of the Declining Enrolment in Ontario Public Schools – Implications for the Teacher Labour Market, McWilliams (2008) reports that declining enrolments have meant decreased revenues and the need to reduce expenditures, resulting in school closures and consolidations as well as the transfer or lay-off of teachers and other personnel.

The Question of Small Rural School Closures and Consolidation

In 2006, as a result of the increase in Ontario's school closures of 2003, the province introduced a uniform standard for making decisions about school closings, which lifted the moratorium on school closings imposed in 2003 (People for Education, 2008). In October of 2006, the Ontario Ministry of Education released the Pupil Accommodation Review Guidelines. Along with the guidelines, Accommodation Review Committees (ARCs) were established to determine the future of low-enrolment schools (Declining Enrolment Working Group, 2009). The Accommodation Review Guidelines lay out a process for consultation, involvement and evaluation to ensure school boards explore a range of factors and views when they are considering closing schools. In 2008, half of Ontario's 72 school boards were undertaking accommodation reviews. The reviews involved nearly 300 schools, and affected over 100,000 students. In May of 2008, the reviews had resulted in 50 recommendations for closure (People for Education, 2008). The Upper Canada District School Board is among the boards involved in the ARC process.

The purpose of the Pupil Accommodation Review Guidelines (PARG) (Ministry of Education, 2006) is to provide direction to Ontario's school boards regarding decisions

about school closures and consolidations. The guidelines state that any decision regarding the future of a school needs to be informed by local community consultation and based on a broad range of criteria regarding the quality of the learning experience for students. In recognition of the role that schools play in strengthening rural and urban communities, these decisions also need to consider the value of the school to the community, taking into account other government initiatives aimed at strengthening communities.

The School Board Accommodation Review Policies, outlined in the PARG (Ministry of Education, 2006), state that school boards are responsible for establishing and following their own accommodation review policies. The guidelines recognize that, wherever possible, accommodation reviews should focus on a group of schools within a school board, rather than examining one single school. These schools are reviewed together because they are in close proximity, making up a planning area to aid in facilitating the development of viable and practical solutions for student accommodation.

The Pupil Accommodation Review Guidelines (2006) set requirements for the use of a formal School Valuation Framework, whereby school boards in Ontario assess each of the following four considerations about the school(s) being reviewed: *value to the student* (i.e., quality of the learning environment, range of course or program offerings, range of extracurricular activities and extent of student participation), *value to the community* (i.e., range of program offerings at the school that serve both students and community members, school grounds available for recreational use, value of the school if it is the only school in the community), *value to the school board* (i.e., condition and location of the school, availability of specialized teaching spaces, fiscal and operational factors), *value to the local economy* (i.e., school as a local employer, attracts or retains

families in the community). School boards are to develop their generic School Valuation Framework with the assistance of a public committee, which should include parents, educators, board officials, and business and municipal leaders. The public review of a particular school or group of schools is to be led by an Accommodation Review Committee (ARC) appointed by the board. Each ARC must include a member from the school community and the broader community. If a group of schools within the same planning area are being reviewed together, each school must undergo a valuation specific to that school using the same framework (Ministry of Education, 2006).

Once the ARC's review begins, school boards are to present alternate accommodation plans for the students of these schools as part of the ARC review. For instance, whether or not there will be changes to existing facilities or transportation. Moreover, the Ministry recommends that a school be subject to one ARC review over a five year period. The committees are to ensure that all information used to determine the value of a school be made publicly available, via the school website or printed copies. Furthermore, once an accommodation review process has begun, the ARC must ensure that a wide range of school and community groups are consulted via public meetings whereby the ARC receives input and community feedback on options for accommodating students who would be affected by a school closure (Ministry of Education, 2006).

Using the School Valuation Framework, the ARCs must complete School Valuation reports for each school reviewed, making recommendations regarding the future of the school(s) being considered. Once this report is discussed with the community, the ARC submits this report to the school board for review and analysis. The school board then presents this report, along with their recommendations and proposals to

the trustees, who will make the final decision regarding the future of the school(s). If the decision involves school closure, the board must outline clear timelines for when the school will close (Ministry of Education, 2006).

In line with the Pupil Accommodation Review Guidelines and in response to the challenge of declining enrolment, in October 2005, the Upper Canada District School Board trustees conducted a system-wide review entitled Boundary 2020. The Upper Canada District School Board (UCDSB) is one of the largest school boards geographically in Ontario. Comprising a considerable portion of Eastern Ontario, this school board includes many smaller schools in rural towns that cater to the youth living in surrounding rural areas. Most of these rural schools, such as the school where I teach, face common rural challenges, such as declining enrolment. Using the ARC procedures outlined above, the UCDSB Boundary 2020 proposal reviewed all the families of schools within the school board in order to slate certain schools for closure and boundary re-alignment. Four advisory ARCs appointed by the school board met throughout 2007 to lead the public review of school closures and program boundary changes under consideration for each family of schools within a specific region. One ARC was assigned for each region of the school board. In October of 2007, proposal packages were released to each region of the UCDSB (the Rideau region, the Capital region, the Gateway region and the St. Lawrence region). Each proposal mapped out the specific initiatives to be taken for a certain family of schools. The Rideau Family of Schools' proposal, for instance, suggested that each of the 4 schools in that family would become K-6 schools, with the grade 7 and 8 students transitioning to the local High School (Educational Proposal Package for the Rideau Family of Schools, 2007).

The Value and Viability of Small Rural Schools

The previous section described the outcomes of the primary challenge of declining enrolment on small rural schools, namely the issue of closures and consolidations. Using the province of Ontario as an exemplification of enrolment trends in Canada, I have explored the process that small rural schools undergo in order to determine whether they are of ‘value’ to the students, community, economy and school board. In the following sections, I focus on the value of small schools in terms of community identity and student learning.

The Small Rural School Community

“Smaller communities are typically places that naturally result in close interpersonal connections, where individuals know, share with, and care for each other. Smaller schools mirror these qualities” (Jimerson, 2006, p. 16). Many of these local schools offer sources of entertainment, sports and music. Rural researchers have described small rural schools as the glue that binds the community together and serves as their economic and social hub (Jimerson, 2006; Wallin, 2007). Thus, there is substantial evidence of local community pride and support for these small rural schools. Herzog and Pittman (1995) explain that rural schools and communities have strengths that should be part of the prescription for remedying problems and directing changes in rural education. Furthermore, certain researchers suggest the development of school and community relationships and the establishment of networks with various groups including school divisions, higher education institutions and the provincial government, in order to contribute to effective learning environments (Bard et al., 2006; Wallin, 2007).

Though the local rural community *surrounding* these schools is an integral component of the unique situation in rural education, many researchers view small rural schools as communities *within* themselves. This notion of the school as a community has its origins in the history of the one-room schools. Rural education researchers such as Theobald and Nachtigal (1995) and Howley (1997) argue that the industrialized and urbanized view of education of the 19th and 20th centuries, ultimately led to the deterioration of the sense of community associated to small rural schools. By closing small rural schools and creating large, urban mega-schools, the small, family-like, community aspect of these rural schools was lost. Sergiovanni (1996) describes communities as collections of people who share mutual commitments and special relationships and are bound by a set of shared ideas, values and beliefs. These communities foster caring, kind, helpful people who have a sense of belonging and responsibility toward themselves and others. Sergiovanni (1996) states that two conditions are necessary for community building: continuity of place and manageable scale. Small schools are unique in that they can provide both these conditions. Findings from a recent study can attest to this positive feature of small rural schools. This qualitative study shows that small rural school cultures foster caring and cohesive communities, which exemplify the following traits: sustaining relationships, providing individual support, supporting student effort and expanding opportunities for success (Haughey, 1996). Therefore, as the previous literature indicates, most recent rural education research capitalizes on the strong sense of community that thrives within and around many existing small rural schools (Herzog & Pittman, 1995).

Rogoff, Matusov and White's (1999) community of learners' instructional model, which is based on the theory of situated cognition, can be adapted to the current small rural school situation. In congruence with Sergiovanni's (1996) idea of community, this model proposes the underlying theoretical notion that learning is a process of transformation of participation in which both teachers and students contribute support and direction to shared endeavors. Thus, within a small school, learning and development occur as people participate in the socio-cultural activities of their community which transforms their understanding, roles and responsibilities as they participate (Rogoff et al., 1999). Newton and Newton (1993) build on this model by stating that in small rural schools, there is school-community integration, enhanced parent-community involvement and hands on learning in the real world.

Learning in a Small Rural School

Numerous Canadian and American projects have been undertaken to bring attention to the uniqueness and strengths of small rural schools. This research underscores the viability and importance of most remaining small rural schools (Bard et al., 2006, Blaine et al., 2004; Corbett & Mulcahy, 2006; Cotton, 1996; Jimerson, 2006). In this subsection, I describe one Canadian study and one American study that were conducted to explore the value and viability of small rural schools.

Canadian Study

In 2006, Canadian researchers, Corbett and Mulcahy (2006), were asked by the Municipality of the County of Cumberland in Nova Scotia to investigate the viability of two schools slated for closure by the Chignecto-Central Regional School Board. To accomplish this task, they conducted a thorough review of the relevant literature,

analyzed various policy documents related to rural policy and rural development and conducted their own study into the educational effectiveness of the two schools under scrutiny.

Their literature review of American and Canadian studies regarding small rural school value and viability is informed by extensive knowledge and experience in rural education, stemming from scholars such as Howley, Cotton and DeYoung. Craig Howley is the most authoritative, widely known and respected scholar and researcher on the relationship between school size, achievement and equity. Within the literature, Corbett and Mulcahy (2006) uncover an increasing body of evidence supporting the effectiveness of small schools in providing students with equality of educational opportunities. The literature indicates the following: there is no significant difference in terms of achievement between smaller and larger schools; smaller schools are somewhat superior to larger schools in terms of achievement; small schools are especially beneficial in mediating the effects of socio-economic status. Furthermore, the research supporting the effectiveness of small schools in providing students with equality of education opportunity continues to grow. The researchers state that there is no evidence that larger schools are better for students. In other words, using a variety of recent studies, they repudiate the idea that more program offerings of larger schools equal a higher quality of education. In comparing large and small schools, the researchers discuss the 'curriculum issue' in detail as well as describe why small schools work. In terms of the curriculum issue, the studies show that the broader curriculum of the larger schools does not, necessarily, have a positive effect on student achievement. Moreover, although small

schools may offer fewer programs in terms of quantity, they tend to be much more inclusive and in many cases are open to all students.

Corbett and Mulcahy (2006) use four questions to guide their research:

1. What are the commonalities amongst various levels of government regarding rural communities and sustainability policy issues?
2. What are the goals of education according to the Public School Program?
3. What is the evidence that small rural schools are structurally adequate for achieving these goals?
4. Are the particular schools slated for closure meeting these goals? (p. 11).

To answer these questions, they employ several specific research techniques, including documentary policy analysis, a literature review of the viability of small rural schools, focus groups, interviews and a survey questionnaire. Their overall methodological position is that it is difficult to address a complex problem like the achievement of the broad goals of the Public School Program (PSP) of Nova Scotia without utilizing a variety of research methods. The researchers combine quantitative and qualitative analysis with the methods of documentary analysis to investigate the research questions from a number of perspectives. They suggest that the data collected and analyzed from surveys and other forms of social research that involve quantitative analysis must be enriched by a focus on the understandings and voices of the multiple stakeholders in the process using qualitative measures. Therefore, they argue that their use of multi-method or triangulated research is considered to be the richest methodological form available for this kind of study.

Following an outline of their study, Corbett and Mulcahy (2006) examine the current policy context in relation to rural education. Their rationale for this analysis is that policy changes of the late 20th century resulted in amalgamations and consolidations of health care and school governance structures. As such, schools like the two under

investigation were being slated for closure and the researchers explored the reasoning for these closures and consolidations. Their policy analysis includes an investigation of documents from relevant governmental bodies (both federal and provincial) and the Municipality of the County of Cumberland and the Chignecto-Central Regional School Board. The researchers pay particular attention to broad policy statements contained in mission and vision statements that frame the way that each level of government understands rural communities, rural development, rural sustainability and the place of education for rural communities generally. For example, the Canadian federal government now recognizes that rural communities are important to the fabric of the country. Similarly, documents from the Municipality of the County of Cumberland state that we should protect and enhance the rural way of life. Finally, the Chignecto-Central Regional School Board documents include a mission statement regarding the orientation of the system to the preparation of well-rounded citizens who will contribute to their communities. Overall, the researchers found that all levels of the policy context share the notion of *community* as a core concept in relation to rural education. Similar to Wallin (2007), the researchers explore the goals and priorities that government bodies establish for effective schools in order to relate these priorities to the viability of small rural schools. As such, their analysis of the PSP is used to inform the construction of focus group questions and specific items for the survey schedules in their data collection phase.

Corbett and Mulcahy (2006) argue that the mentality that educational performance is standard and can be measured without problems is a myth, which counters other quantitative studies linking achievement to rural schools. Rather than focusing on standardized testing, the evidence suggests that schools function to produce capable,

literate, caring, engaged life-long learners who are prepared for full participation in a rich community life and satisfying employment. They argue that such ambitious educational goals are not easily measured. Thus, in terms of their report, the researchers assume that the only way to actually measure such broad educational outcome is to listen to the voices of people who have moved beyond their school experience. Consequently, to determine the viability of the two schools under investigation (River Hebert and Wentworth schools), the researchers conducted surveys and interviews with graduates from these schools. In the discussion of the results, the researchers outline specific themes pertaining to small school viability and value such as: self-esteem/self-respect, feeling valued, working effectively and cooperatively with others, caring for others and volunteering for leadership roles. These themes are related to the holistic development of students. Many studies show that this development can be fostered in various ways including: opportunities for leadership, engendering in students a sense of belonging and being needed, and opportunities to take part in extra-curricular opportunities. Furthermore, the research literature confirms that in terms of social and affective development, students excel in smaller schools. Therefore, small rural schools provide a personalized learning environment that fosters students' social and affective development (Corbett & Mulcahy).

Based on the evidence compiled, Corbett and Mulcahy state:

It would be a grave error to close these schools now or at any point in the future. To do so would be a backward step which is totally out of synchronization with the best current thinking in education in North America. It may even jeopardize the potential for success of many students currently attending Wentworth and River Hebert (2006, pp. 9-10).

Therefore, their research determines that the two schools under investigation are both viable and valuable educational institutions, serving the children and their communities well.

American Study

In the United States, the Rural School and Community Trust (Rural Trust) is the leading national nonprofit organization addressing the important relationship between good schools and thriving rural communities. Rural Trust seeks to improve the quality of teaching and school leadership in rural communities, advocates for appropriate state educational policies and addresses the issue of funding for rural schools. In 2006, as part of a Rural Trust initiative, Jimerson conducted research to investigate “why small works” (p.7). In congruence with Corbett and Mulcahy’s (2006) study, she examines the current rural education literature for typical attributes of smaller schools that have a positive effect on student learning and well-being.

Jimerson (2006) introduces the concept of ‘why small works’ by noting the recent Bill and Melinda Gates Foundation initiatives to break large urban schools into smaller schools. In congruence with many studies on small rural schools, the purpose of this study is to support rural communities who are fighting against recent initiatives for small school consolidation (Corbett & Mulcahy, 2006; Jimerson, 2006; Wallin, 2007).

Jimerson states that small *rural* schools are frequently the glue that binds together small communities, serving as their economic and social hub. She believes identifying key effective elements of *smallness*, will help to improve schooling in places where small schools are forced to conform to the illusion of ‘bigger is better.’ Jimerson aims to dispel this illusion by exploring the following ten reasons why small works: 1) There is greater

participation in extra-curricular activities, and that is linked to academic success, 2) Small schools are safer, 3) Kids feel they belong, 4) Small class size allows more individualized instruction, 5) Good teaching methods are easier to implement, 6) Teachers feel better about their work, 7) Mixed-ability classes avoid condemning some students to low expectations, 8) Multiage classes promote personalized learning and encourage positive social interactions, 9) Smaller districts mean less bureaucracy, 10) More grades in one school alleviate many problems of transitions to new schools.

Jimerson (2006) elaborates upon these themes, explaining that these ten themes fit into three categories: relationships, instructional strategies, and structural elements. She argues that attributes such as students' sense of belonging, school safety and teacher morale are closely linked to the quality of interpersonal relationships found in small schools. Elements such as looping, integrated curriculum, experiential learning, and individualized instruction can be viewed as instructional approaches implemented to improve student learning. Factors such as class size, district size, and grade-span configuration are all structural components of school systems. Therefore, in relation to DeYoung and Howley's (1990) distinction between schooling and schools, Jimerson distinguishes between interpersonal relationships and instructional strategies, which relate to individual *schools* and structural components of school systems, which relate to *schooling* in general.

Jimerson (2006) ascertains that these ten themes only scratch the surface of small school attributes that are associated with positive outcomes for children. She notes that emerging studies are beginning to uncover other features of small schools that are advantageous for students. As such, her investigation is fluid and not an end result.

However, she concludes that the ongoing battle to close small schools is unnecessary and irrational as exemplified in this quote, “To expend energy on closing these schools diverts energy and focus from strengthening them” (Jimerson, 2006, p. 17).

Corbett and Mulcahy’s and Jimerson's studies are examples of the recent increase in literature relating to small rural school effectiveness. Other studies have shown additional small school strengths, such as a higher number of students taking academic courses and students developing a close connection with their community and positive attitudes toward school and their peers (Bard et al., 2006; Blaine et al., 2004; Cotton, 1996). Furthermore, Canadian researchers Newton and Newton (1992) explain that the following effective and well-respected teaching practices originated in small schools: individualized instruction, peer-tutoring, cooperative education and school and community relationships. Moreover, they list various advantages of small rural schools in Canada namely: lower pupil/teacher ratio, equal opportunity for extra-curricular activities, more leadership opportunities and high levels of community support for schools. Newton and Newton (1992) argue that rather than closing these small rural schools, we should be capitalizing on their contexts. For instance, the small school population could lead to school-community integration and locally relevant curricula. Low pupil/teacher ratios could lead to individual attention, positive teacher/student rapport and personalized curricula.

Summary

Beginning with a rise in industrialization and urbanization, followed by the proliferation of global trends, schooling has become a marketable commodity. Small rural schools have been left behind in the wake of these ‘developments.’ Despite the

research evidence pertaining to the various advantages of small rural schools (Corbett & Mulcahy, 2006; Jimerson, 2006; Newton & Newton, 1992), many North American reform efforts are advocating for the closure and consolidation of these schools. Although the theory of situated cognition stresses the importance of social and physical contexts upon learning, endorsed by researchers, such as Newton and Newton (1992) who explain that we must capitalize on the contexts of small rural schools, globalized, standardized ideals continue to 'rule the school.' An examination of a localized example of this phenomenon is necessary to gain a deeper understanding of where the small rural school stands. The following chapter details my research methods and data analysis.

CHAPTER 3

METHODOLOGY

To this point, the introduction and literature review have been intended to contextually, conceptually and historically inform my methodology. In what follows, I will elaborate upon my methodology for this project. I begin with a rationale for my qualitative approach and research design, followed by an outline of the rural context particular to my study and the conceptual framework grounding my research. I then describe my research methods, explaining how I investigated the aforementioned research questions through location, identification and analysis of seven pertinent documents: my personal anecdotal notes, a summary of the UCDSB Boundary 2020 proposal, a poem written by a local parent and Township of Rideau Lakes councilor in response to the Boundary 2020 proposal, a newspaper article from the Brockville Recorder and Times, a news release from the Elementary Teachers' Federation of Ontario (ETFO), a research article from the UCDSB and a message from the director of the UCDSB.

Rationale for the Choice of a Qualitative Approach and Research Method

McMillan and Schumacher (2006) explain that qualitative studies are important for the illumination of social issues and the improvement of educational practice. In addition, Howley (1997) asserts that researchers in the field of rural education have a responsibility to expand their knowledge of rural places, ways of living and working and local rural meanings. In line with these authors' thinking, a qualitative approach was used to shed light upon an issue that has been silenced by North American school boards for

decades; the issue of the impact of closure and consolidation movements on small rural towns and students' education. By doing so, I hope to empower the rural inhabitants who have been marginalized and give them a voice in the future of their schools.

Bodgan and Biklen (1998) write, "the qualitative researchers' goal is to better understand human behavior and experience. They seek to grasp the processes by which people construct meaning and to describe what those meanings are" (p. 38). In order to investigate meanings and identities, qualitative researchers use a variety of research methods including: participant observation, in-depth interviews, document and artifact collection and field observations (McMillan & Schumacher, 2006). In addition, Howley (1997) notes that in order to study rural educational circumstances, the researcher needs to have "interest in matters and minds rural" (p. 7). He explains that interest refers to some combination of experience and understanding that puts the researcher in the middle of a salient rural issue. As such, the best experience on which to ground the researcher's interest would be to live or work in a rural community (Howley, 1997). I believe one way to cultivate rural meanings would be to engage in an in-depth participatory qualitative study, including interviews and participant observation. I have nonetheless become involved in the exploration and discovery of rural lives and meanings through working in a small Eastern Ontario rural school for five years and reflecting upon my experiences. Coupled with these experiences, I have thoroughly reviewed the pertinent rural education literature and engaged in personal and official document analyses.

McMillan and Schumacher (2006) describe personal and official documents as artifacts. "Artifact collections are tangible manifestations that describe people's experience, knowledge, actions and values" according to McMillan & Schumacher (p.

356). Hodder (2000) adds to the importance of analyzing artifacts by stating that these documents provide insight into other components of lived experience. Thus, in terms of my research, artifacts have been collected and analyzed in order to gain a better understanding of where the small North American rural school stands. These artifacts include: personal anecdotal notes, written while teaching in one small rural school, one particular Eastern Ontarian school board proposal, three responses to this proposal (a poem written by a parent, a local newspaper article and an ETFO news release), and two news releases from the UCDSB officials regarding the outcomes of this proposal. Through a thorough analysis of these documents, I have searched for the construction of meanings among small rural school stakeholders. By employing multiple documents for varying points of view, I increased the validity of my study. Moreover, although as a teacher in one of these small rural schools in Eastern Ontario, I have first-hand understanding of the situation of small rural schools, by keeping an anecdotal journal (field log), analyzing my notes and engaging in critical questioning, I was able to be more objective. This objectivity enabled me to be detached from my emotions. As McMillan and Schumacher (2006) suggest, the two strategies of keeping a field log and engaging in critical reflexivity enhance the overall reflexivity of a study.

Overall, this research design proved to be effective and valuable as regards my particular study, in that I was able to gain a deeper understanding of the situation of North American small rural schools and promote opportunities for social awareness of rural perspectives. As Howley (1997) writes, this research is necessary in order to:

Pull back the veil of national, or cosmopolitan, concern in order to expose contemporary rural issues not only worthy of attention in their own right, but worthy of particular attention in an ethos more evidently concerned with globalization than with its related need for ruralization. (p. 2)

Context

In my literature review, I have explored small rural schools from a broad North American perspective. For the purpose of my study, I have localized my research context to that of an Eastern Ontario school board: The Upper Canada District School Board. I have chosen this school board as my research site because, as one of the largest school boards geographically in Ontario and comprising a considerable portion of Eastern Ontario, this school board includes many small schools in rural towns that cater to the youth living in surrounding rural areas. Moreover, 13 of the 50 schools slated to close in Ontario by 2012 are UCDSB schools (Thomas, 2010). I have drawn upon my teaching experience in one particular small rural school within this school board to provide personal anecdotal evidence to locally situate my research and acknowledge the relationship between this school and the school board.

The school where I teach is located in a rural town with a population of approximately 600 inhabitants. Most students travel to school by bus from the local community and surrounding areas within a radius of 10 kilometers. The school population consists of 85 students, 4.4 teachers, one principal, one half-time educational assistant, one office administrator and one custodian. Given that the school population consists of 85 students from kindergarten to grade 8, the school is divided into split-grade and triple-grade classrooms. Due to its demographics and location, this school is often described as a small rural school. As a small rural school, this school faces many of the rural education challenges, previously mentioned in the literature review, namely declining enrolment, multi-grade classrooms and high teacher turnover rates. The local community is aware that the recent school board review, *Boundary 2020*, seeks to close

some schools in the area, re-align program boundaries and transition the grade 7 and 8 students to the local high school in 2011.

The current discourse at this school is that in September of 2011, the grade 7 and 8 students will transition to the local high school, leaving this school with a population of less than 65 students from kindergarten to grade 6. Following this move, it will be up to policymakers and administrators to ultimately decide whether this school is fiscally and viably worth saving. Thus, the discussion around these transition and reorganization programs is pervading the local community as well as the school culture. This makes for a climate of anxiety and uncertainty among students, parents and community members. Considering the apparent confusion around school board officials' reasoning for these plans, it is an important issue to investigate. Moreover, the acknowledgement of rural perspectives requires further attention in order to explore the possible role of rural stakeholders in the future of their schools and communities.

Conceptual Framework

Of note at the outset of my conceptual framework is the fact that most of the previously reviewed literature concerns research that was conducted in response to recent small rural school consolidation and closure initiatives. Thus, over the past few decades, various North American organizations have commissioned research to develop an awareness among educators and administrators regarding rural concerns and the viability of small rural schools. As such, most of the research is not developed around a theoretical framework per se. Rather, the researchers have built upon prior findings and philosophies in rural education to establish a conceptual lens through which to view the current rural education context. I have drawn upon these various rural perspectives to guide my

inquiry. These perspectives and concepts have given direction to my research. I have also teased out the shared theories of globalization and situated cognition that underline the literature.

Upon an exploration of the literature concerning North American small rural school closures and consolidation, the concept of globalization was identified as a key factor in educational change reform in rural areas (Howley, 1997; Wallin, 2007). According to Carnoy (2000), as the quality of national education continues to be compared on an international scale, school quality is related to interschool competition and school accountability. Impacted by this globalized way of thinking, schools around the world place an emphasis on standardized testing and meeting global standards for the delivery of schooling (Carnoy, 2000). As such, schools that do not meet these pre-set standards, such as small rural schools, are labeled as needing improvement and tend to face educational reform agendas, which can include school closures and consolidations. Moreover, the corporate criteria of productivity, efficiency and effectiveness extend into the world of schooling (Carnoy, 2000; Stromquist & Monkman, 2000) and filter into small rural school reform (Bard et al., 2006; DeYoung, 1987; Theobald & Nachtigal, 1995). As schooling converges into one single global model, or one best system, the benefits of small rural schools, such as smallness, sense of community, equal extra-curricular opportunities for all and so on, are deemed deficiencies instead of advantages. Thus, the purpose of education tends to focus on the universalized, standardized education of citizens instead of the unique learning experience of the individual (Eisner, 2005).

In contrast to these globalized conceptions of schooling, the theory of situated cognition, focusing on ‘communities of practice’ (Barton & Hamilton, 2005; Gee, 1997; Lave, 1997; Wenger, 1998) is interwoven in the literature which outlines the value and viability of small rural schools (Corbett & Mulcahy, 2006; Cotton, 1996; Jimerson, 2006).

Not only have the concept of globalization and the theory of situated cognition grounded my research, they have shown to support the opposing perspectives surrounding the ‘for’ (globalization) and ‘against’ (situated cognition) sides of small rural school reform. With regards to this apparent conflict in perspectives, my research has also been informed by Wallin's (2007) premise that as tension continues to increase between rural priorities and lifestyles and urbanizing, globalizing agendas, rural schools will continue to be exploited in the name of efficiency and curricular opportunity. In response to Wallin's suggestion, Theobald and Nachtigal (1995) argue that a return to community-centred rural schools could be the answer to the globalizing, universalizing school rhetoric. This conflict of global versus local and the world versus the community has provided a foundation for my research.

Methods

Given the research documenting the common challenges many small North American rural schools encounter (Bard et al., 2006; Blaine et al., 2004; Mulcahy, 1993; Wallin, 2007) and school closures and consolidations as educational officials' primary response to these challenges (Corbett & Mulcahy, 2006; Herzog & Pittman, 1995), an analysis of the link between this ‘problem’ and ‘solution’ was appropriate. In order to support these research findings in the literature review and undergo a thorough

investigation of this phenomenon, a document analysis, using semiotic analysis as the basis was used. By localizing the problematic to one Ontario school board and utilizing one particular family of schools as my research site, my aim was to understand the rationale behind these closure and consolidation initiatives, how they were shared with the public and local rural stakeholders' (i.e., parents, teachers, students, community members) responses to these initiatives.

Document Selection

After several months of background reading on rural education during my first year of the Master's program at Queen's University, I returned to teach at the aforementioned small rural school for the 2009-2010 school year. Whilst teaching, I began a journal, documenting my experiences with the issue of declining enrolment, Boundary 2020 and the characteristics of small rural schools. Throughout the year, I uncovered one particular Boundary 2020 document, outlining the Who, What, When, Where of Boundary 2020 in a clear, concise manner for the public. Following the first consolidation phase, I found school board research as well as a director's address outlining the so-called positive aspects of these UCDSB reforms on school staff and students of these 7-12 and K-6 high schools (Dawes, 2009; Thomas, 2010). I also had casual conversations with many local community members regarding the Boundary 2020 process and uncovered various perspectives regarding the climate of uncertainty and possible school reform. One particular parent, who was also a Township of Rideau Lakes Councilor, had attended many ARC meetings and displayed a passionate response to the school board initiatives. He shared his feelings and opinions in a poem (Carson, 2007)

and read this poem at an ARC meeting. Given the array of Boundary 2020 documents and written responses to this reform, I chose to analyze the documents mentioned above.

Boundary 2020 Official Document

In September of 2007, David Thomas, the Director of Education of the UCDSB, created an information sheet for parents and guardians of UCDSB students regarding the Boundary 2020 process. This document, entitled *The Five Ws and How of Boundary 2020*, explains that guided by the UCDSB's School Closure Policy No. 413 and the Pupil Accommodation Review Guidelines, issued to all Ontario school boards by the Ministry of Education in October of 2006, Boundary 2020 is a school closure and boundary review. The argument for school closures stems from the rationale that declining enrolment within the board was threatening the board objective of a 90% graduation rate by 2020 since small schools with fewer students would obstruct the board's ability to provide quality education to future generations of students. The argument for boundary reviews stems from the rationale that the boundaries in place for many elementary schools did not align with their feeder high schools. Thus, the UCDSB needed to correct many of its boundaries. Four advisory ARCs appointed by the board were to meet throughout 2007 to lead the public review of school closures and program boundary changes under consideration for each family of schools. The UCDSB officials explain that all stakeholders, including parents, teachers and students would have the opportunity to voice their opinion and participate in the Boundary 2020 process. For the remainder of this study, this document will be referenced as 'Boundary 2020, 2007.'

UCDSB Research Article

In September of 2009, following the implementation of the first stage of Boundary 2020, the UCDSB conducted two surveys, polling 30 principals, vice-principals and system managers throughout the board. The article entitled *Staff and Students Like Grades 7-12 and K-6 Schools, Surveys Suggest* outlines the results of these surveys. Phil Dawes, the UCDSB Planning and Research Officer writes: “The surveys show that our system is responding well to the new format and that these changes are helping student learning” (lines 6-7). Although the article reviews various findings indicating that school and community reaction has been positive to the changes set out under Boundary 2020, the surveys also emphasize the need for mentoring opportunities for students and staff. The article concludes with an assurance that further surveys of students and the wider school communities are planned in the weeks and months to come.

Director’s Message – Building 2020 Website

A general internet search of Boundary 2020 will defer the searcher to the ‘Building 2020’ website. On the homepage of this website, the Director of Education, David Thomas (2010) has posted a message welcoming visitors to the website. In this message, he explains the purpose of the Building 2020 website as keeping all stakeholders informed of Boundary 2020 updates, including grade 7-12 schools, French course programming, Junior Kindergarten to Grade 6 schools and Bus Transportation. Thomas re-iterates the information found in the Five Ws and How of Boundary 2020 and states that on May 14, 2008, school board trustees voted to close 13 schools by 2012. Thomas relates the challenge of declining enrolment to changing demographics and the weak eastern Ontario economy. As such, he argues that in order to achieve the 90%

graduation rate by 2020, “we must enhance educational programming – hence the creation of Building 2020” (lines 14-16).

Kingston Recorder and Times Article

On April 30th, 2008, the last public meeting was held in order for delegations to make their final presentations to the trustees on Boundary 2020 plans, prior to their vote on May 14th, 2008. Kim Lunman reports on this meeting in her article, *School closures could hurt their communities, realtor tells board*. She describes the 15 delegations present at the meeting including parents, realtors, councilors and students, and their various arguments against Boundary 2020. Lunman writes: “School closures and transferring grades 7 and 8 students into region’s high schools by 2012 are among Boundary 2020’s most contentious recommendations” (paragraph 16). This article outlines the debates on this controversial topic, which occurred at this meeting between delegates and trustees. Realtors argued that closing down schools within the region has devastated communities. School council members voiced concerns about losing programming, such as the design and technology workshop in proposed recommendations to transfer elementary students to high schools. High school students wondered how the high schools would accommodate for an influx of new students, when their classrooms, cafeteria, computer labs and Science labs were already full.

Elementary Teachers’ Federation of Ontario (ETFO) News Release

The ETFO news release entitled *Board’s proposal to transfer grade 7 and 8 students to high schools is ‘just plain wrong’ say elementary teachers*, describes the campaign launched in December of 2007 to underline the harmful effects on young adolescents resulting from the Boundary 2020 grade 7 and 8 student transfer to high

schools. Through this campaign ETFO deliver the message that “elementary schools offer a better and safer learning environment for young adolescent children, an environment less open to bullying and more closely connected to the local community” (lines 5-7). ETFO president David Clegg argues that the UCDSB has offered no evidence to support the assumption that this accommodation plan will improve student learning for grades 7 and 8. Rather, Clegg explains that academic research suggests that elementary schools are better for young adolescent students. If these students go to the high schools, they will have longer bus commutes, face the pressure of older, more mature students and lose the many benefits only provided by elementary schools. ETFO urges parents to speak out against Boundary 2020, using the ETFO campaign website, www.protectourkids.ca.

Poem

Amidst the various parental concerns surrounding the Boundary 2020 reform, specifically school closures and the grade 7 and 8 move, one particular parent, Anders Carson (2007), voiced his concerns in a poem, entitled “Look at the Stars.” As a parent and Township of Rideau Lakes councilor, Carson petitioned against the pending closures and consolidations. In his poem, he fondly depicts a rural community “where it is possible to not only reach for the stars, but also to see them” (lines 27-30). He portrays this community as being threatened by school closures at the manipulative hands of governments. As these governments and school board officials press for the closures of these small community schools in the name of quality education, Carson counters this rationale by stating: “A silent swing does not a better education bring” (lines 8-9). Closures and consolidations will only bring sorrow and community devastation in the form of “cries of long distance learning” (line 10) and “tears of flags being lowered” (line

11). Carson concludes his poem with a hopeful tone, urging all stakeholders to care for these communities and their destinies.

Journal

As previously described, in September of 2009, I began a personal journal, documenting my experiences at the school where I teach. Given that the Boundary 2020 reform was the cause for many questions and concerns regarding the future of our small rural school and grade 7 and 8 students, I chose to write about the ‘ins and outs’ of a small rural school facing possible reform. As such, my journal is both a documentation of the Boundary 2020 process in one local school as well as a celebration of this small rural school’s accomplishments.

I chose the above sources because I felt that they each show a different perspective on the UCDSB initiatives, coming from: a school board director, an educational school board researcher, an ETFO representative, a parent, a teacher and a community member. The Boundary 2020 (2007) document serves as an exemplification of the abundance of North American small rural school reform initiatives. The director’s message describes the new ‘Building 2020’ website and summarizes the school board’s consolidation and boundary alignment initiatives (Thomas, 2010). The UCDSB research article outlines two surveys conducted by the UCDSB, involving principals, vice-principals and system managers, suggesting that “staff and students like their new grades 7-12 high schools and K-6 elementary schools” (Dawes, 2009, p. 1). The poem displays a parent’s passionate response against this initiative (Carson, 2007). The ETFO (2007) news release outlines ETFO’s stance on the Boundary 2020 proposal to transfer grade 7 and 8 students to the local high schools. The news article discusses the possible effects of

Boundary 2020 on the future of local communities (Lunman, 2008). My anecdotal notes outline personal observations of the effects of these changes on the school culture (Thompson, 2010).

Semiotic Analysis

Within my document analysis, I am engaging in a semiotic analysis of recurring themes in the literature. The semiotic method aids in understanding how we encode and decode meaning from the many representations we make. Semiotic analysis consists in establishing significations or meanings. In this study of documents, I am examining verbal signs and linguistic structures such as expressions and phrases. I am looking at the meanings different groups of people (i.e., administrators versus parents) make of certain words (Danesi & Perron, 1999). For instance, 'Boundary 2020' may have a harsh tone for parents and community members, as it relates to drawing barriers. Perhaps it is for this semantic reason that, in 2009, the UCDSB changed their Boundary 2020 website to 'Building 2020.' Hence, words need some figuring out in the context of background culture knowledge. First, I will identify *signifiers*, words or groups of words, such as 'declining enrolment' or 'Boundary 2020,' the use of which is indicative of position taking in the debate of concern. Then, I will consider the context, because it determines or at least constrains, the particular meaning that it entails. For example, in the context of my research site (the small rural school where I teach), the words 'Boundary 2020' may have a negative connotation for parents, students and teachers; whereas, in a larger school in Brockville or Carleton Place, these words may be known, but hold a positive or neutral connotation. Finally, I will complete the inquiry by making an interpretation (Hayakawa, 1991).

Beasley, Danesi and Perron (2000) recommend the following questions which I will use to guide my analysis: Who or what created the sign (expressions, phrases)? What does it mean? How does it deliver its meaning? What medium was employed (verbal, such as rhymes, non verbal, such as images)? For whom was it intended, or how did it come about? In what context does it occur? To what system of signification does it belong (ex. persuasive discourse, creative, argumentative, etc.) How many interpretations are possible under the circumstances?

In doing so, I will concentrate on what the message means and on how it creates meaning. I am looking at interpretive dimensions and more specifically hermeneutics as I aim to study how the chosen official and personal documents generate meaning. I try as much as possible to identify the meanings on the basis of symbolic considerations, relevant sources and historical background. A technique often used is semantic-differential: it consists of asking a series of questions about a specific concept. Is it good, or bad? Is it weak or strong? Is it negative or positive? (Osgood, Suci & Tannenbaum, 1957).

Document Analysis Process

Themes and Coding

In the early stages of my research, I uncovered various themes within my literature review, such as common rural challenges, small school closures and consolidations, declining enrolment, globalization, situated cognition etc. I colour-coded these themes throughout my literature search. During my personal and official document analysis, I used these previously established themes to uncover similar themes, such as

declining enrolment, Boundary 2020 and voices of all stakeholders. The unit of analysis chosen was a word, phrase or short paragraph in a chosen document.

However, it became apparent that the themes relating to the unit of analysis had particular meanings attached to them depending on the creator of the sign, its context, how it was delivered, using what medium, and for whom it was intended (Beasley et al., 2000). As such, there could be various interpretations of one particular sign, depending on these aforementioned factors. Using the semiotic method and following the questions that Beasley et al. recommend, I investigated each pre-determined theme according to its frequency, significance and meaning to the stakeholders in question. In order to present the findings resulting from my document analysis, the unit of analysis was highlighted and coded according to a pre-determined semantic coding scheme. Once the themes were coded, I used the semantic differential technique, described in my methodology section, to attach a positive or negative value to this theme, according to how it was being portrayed in the context of the document. For example, the theme of 'declining enrolment' was coded as DE and set along a scale from 1 to 7; 1 demarking that declining enrolment is 'problematic for quality education' and 7 demarking the potential 'positive aspects' of declining enrolment for 'quality education.' Using these thematic codes and scales, I highlighted a phrase such as:

The UCDSB is dedicated to the long term objective of its CREW (Communication, Equitable Distribution of Resources, Educational Programs and Wellness) strategic plan; namely, a 90% graduation rate by the year 2020. But the UCDSB is at risk of not achieving this objective due to declining enrolment caused by our aging population (Boundary 2020, 2007, lines 9-13).

I then marked the appropriate code in the margin (DE) and allocated a specific number to this phrase. For this particular phrase, as it was evident that the UCDSB

believes declining enrolment to be detrimental to quality education, it was placed at the beginning of the scale, with a qualifier of 1.

Table 1 lists the themes, the code allocated to each theme and the value scale relating to each theme.

Table 1

Themes, Codes and Qualifier Descriptions

Theme	Code	Scale (qualifiers)						
		1	2	3	4	5	6	7
Small School Closures and Consolidations	CC	negative impacts			positive impacts			
Declining Enrolment	DE	problematic for quality education			positive aspects for quality education			
Boundary 2020	B2020	problematic for student learning and communities			beneficial for student learning and communities			
Potential Effects of School Closures and Consolidations on Communities	CCRC	harmful effects on communities			positive effects on communities			
Voices of all Stakeholders	VS	few voices are heard			numerous voices are heard and valued			
Grade 7/8 Transition to High Schools	G78T	harmful effects			positive effects			
Learning in Small Rural Schools	LSS	Problematic			valuable			
Government Involvement in Closures and Consolidations	GI	negative involvement			positive involvement			
Small Rural Community	SRC	little value attached			highly valued			

Table 2 represents the location and qualifiers of codes within the documents. The numbers in parentheses signify the value assigned to each code as it appears in a particular part of a particular document.

Table 2

Location of Codes and Values in Documents

Code	Boundary 2020 Official Document	Research Article Building 2020	Director's Message Building 2020	Recorder & Times Article	Poem	Journal	ETFO News Release
CC	L. 2-3 (5) L. 16-18 (5)	L. 1-2 (6) L 6-9 (6)	L. 5 (5) L. 6 (5)	Pa. 14 (6)	L. 8-9 (1) L. 10-11 (1)	10/14/09 (2)	L. 1-3 (2)
DE	L. 9-13 (1) L. 14-15 (1)		L. 10-11 (2)	Pa. 6 (3) Pa. 11 (1) Pa. 13 (4)		10/23/09 (6)	
B2020	L. 4-5 (4) L. 7-8 (7) L. 29-30 (5) L. 30-32 (7)	L. 26-28 (6)	L. 2-3 (6)	Pa. 15-16 (4)	L. 8-9 (1)	09/08/10 (2)	L. 9-10(2) L. 15-16 (2)
CRCC	L. 6-7 (7) L. 34 (6)	L. 3 (7)		Pa. 1 (1) Pa. 2-5 (1) Pa. 11 (6)	L 19-20 (2)		
VS	L. 20-21 (5) L. 35-36 (6) L. 39-40 (7)	L. 3 (5) L. 10-11 (4) L. 29-30 (5)	L. 8 (6) L. 18-20 (6)	Pa. 15 (7) Pa. 17-20 (7)	L. 24-25 (5)	11/25/09 (3) 11/12/10 (6)	L. 4 (5) L. 22-24 (7)
G78T		L. 2 (7) L. 6-9 (7) L. 14-21 (7)	L. 6 (5)	Pa. 21 (2)		10/14/09 (2) 06/10 (4)	L. 1-3 (1) L. 5-7 (1) L. 8-9 (4) L. 12-14 (1)
LSS	L. 13-15 (2)					09/09 (6) 10/20/09 (6) 10/22/09 (6) 10/22/09 (2) 10/23/09 (7) 11/12/09 (5) 11/24/09 (6) 11/24/09 (3) 11/26/09 (3)	L. 19-21 (6)
GI				Pa. 24 (4)	L. 3-5 (1)		
SRC				Pa. 1-5 (5)	L. 19-20 (7) L. 26-30 (7)	10/20/09 (6) 10/22/09 (6) 11/12/09 (6) 12/15/09 (7)	

Notes: Pa. = paragraph, L.= line, Dates = month/day/year

After coding the location and value of themes within the documents, I used Table 2 to investigate the frequency of each theme within and across documents. This step allowed me to determine which themes were meaningful and significant to most or all stakeholders. Through code and value comparison across documents, patterns within the documents were established in order to determine the similarities and differences

between the stakeholders' perspectives, which will be outlined in Chapter 4. This analysis of frequency and patterns enabled me to uncover the major themes that were pertinent in the rural stakeholders' perspectives, my conceptual framework and the literature reviewed. These major themes form the basis for discussion in Chapter 5.

Summary

In this chapter, I have contextually and conceptually grounded my research by outlining my research site choice as well as the theories that have guided this inquiry. I have provided a detailed account of my methods: (a) document selection, (b) semiotic analysis and (c) themes and coding. A non-interactive qualitative research design has proved to be beneficial to this study in that, through document analysis, using semiotic analysis, I have explored and uncovered various themes relating to perspectives on the past, present and future of small rural schools.

The following chapter presents the findings resulting from my document analysis.

CHAPTER 4

FINDINGS

The purpose of this study is to understand the reasoning behind small rural school reform and the various responses to this reform. To this point, I have analyzed seven documents related to the Boundary 2020 process, using themes uncovered in my literature review. This chapter outlines the results of my document analyses. Following the data collection outlined in Table 2, I examined the frequency and values associated to the nine original themes across documents. This step allowed me to uncover patterns in the form of common perspectives found within documents. Using these patterns, four frequent and emergent themes were teased out. This chapter provides a detailed account of these four themes and examples of these themes within the documents. This chapter concludes with an exploration of the main theme of ‘voices of all stakeholders’ and how this theme is intertwined within the four major themes.

In order to present the findings resulting from the document analysis, I analyzed the codes and values presented in Table 2. The purpose of this step was to uncover the shared meanings different groups of people made of different themes. Using the previously established semantic differential, I took the 1 to 7 value scale from Table 1 and 2 and transferred this data onto a Positive and Negative value scale. Specifically, numbers 1 to 3 were allocated a negative (N) value, number 4 was allocated a neutral (Neutral) value and numbers 5 to 7 were allocated a positive (P) value. If the document had more than one occurrence of a particular theme, such as DE in the Recorder and

Times Article: Pa. 6 (3), Pa. 11 (1), Pa. 13 (4), I took numbers 1, 3 and 4 and calculated an average of 2.7. Thus, this data was entered as negative (N).

Table 3 shows the values of codes across documents. This table is colour-coded in order to visually distinguish between the positive (green), negative (red), neutral (blue) and non-applicable (shaded) sections.

Table 3

Values of Codes across Documents – Attitudes toward Reforms

Code	Boundary 2020 Official Document	Research Article Building 2020	Director’s Message Building 2020	Recorder & Times Article	Poem	Journal	ETFO News Release
CC	P	P	P	P	N	N	N
DE	N		N	N		P	
B2020	P	P	P	Neutral	N	N	N
CRCC	P	P		N	N		
VS	P	P	P	P	P	P	P
G78T	P	P		N		N	N
LSS	N					P	P
GI				N	N		
SRC				P	P	P	

Common Perspectives

Table 3 shows apparent commonalities in value association across documents. For the closure and consolidation theme, for instance, the Boundary 2020 official document, research article, director’s message and Recorder and Times article all share a positive view of these reforms; whereas the poem, journal and ETFO news release all share a negative view of these reforms. In order to analyze the findings in Table 3 and draw conclusions, I asked the following questions: For whom was it intended, or how did it come about? In what context does it occur? To what system of signification does it belong? (ex. persuasive discourse, creative, argumentative, etc.) (Beasley et al., 2000) In doing so, I uncovered the following patterns between documents.

The Boundary 2020 document, director's message and UCDSB research article share common properties. They are intended for parents and teachers throughout the entire school board. All three documents occur throughout the beginning (Boundary 2020 official document), middle (research article) and end (director's message) of the Boundary 2020 process. These documents are both informative and persuasive. While explaining the details of the Boundary 2020 process, these documents attempt to persuade their readers that declining enrolment is problematic for schools and students and that an ideal solution are Boundary 2020 reforms, which will increase quality education and strengthen communities. For the remainder of this project, these documents will be entitled the 'pro Boundary 2020' documents.

The poem, journal and ETFO news release present common perspectives. These documents oppose the 'pro Boundary 2020' documents on most themes. For example, Boundary 2020 and hence, closures and consolidations, which were previously viewed as positive by the first three documents, are seen as negative in the poem, journal and news release. The intention of these three documents is to give a voice to rural stakeholders (i.e., parents, community members and students). They occur in a more localized context to the previously described board-wide documents. These documents are reflective, argumentative, creative and persuasive. The authors are attempting to deliver a very specific message: Small rural schools have many gifts to give and closing down or consolidating these schools will hinder both student learning and rural community identity. For the remainder of this project, these documents will be entitled the 'pro saving small rural schools' documents.

The Recorder and Times article shares common properties with both the ‘pro Boundary 2020’ documents and the ‘pro saving small rural schools’ documents. This article is informative and was intended for all audiences. Lunman represents both sides of the debate, by quoting both the director of education, David Thomas as well as community members and students. As such, in this article, the voices of various stakeholders are acknowledged.

Major Themes

Building upon the patterns found with regards to the aforementioned common perspectives and re-evaluating the data collected in Table 2 and Table 3, I consolidated the nine original themes into four major themes. Using these themes, I re-visited the seven documents and coded them according to the major themes. Once again, the findings show from the documents analyzed, that there is a debate between whether or not declining enrolment is a valid argument for closure and consolidation initiatives, such as Boundary 2020; and the positive and negative effects of Boundary 2020 on education and community sustainability.

Table 4 shows the debating representations of the major themes surrounding closure and consolidation initiatives and examples of these themes in the documents.

Table 4

School Closures and Consolidations - Major Themes, Main Arguments and Examples

Major Themes	Pro Boundary 2020 (arguments for school closures and grade 7 and 8 consolidation)		Pro saving the small rural school (arguments against Boundary 2020)	
	Argument	Example	Argument	Example
Declining Enrolment and School Size	B2020 will fix the problem of DE by closing small schools and creating large mega-schools	“The stark reality is that our school board...faces a new challenge of DE because of changing demographics...and that reduces the number of children entering Kindergarten each year. So to achieve our goal of a 90% graduation rate by the year 2020, we must enhance educational programming – hence the creation of B2020” (Thomas, 2010, L. 9-16).	DE requires further research. Research shows that small schools are beneficial to student learning	“Small rural schools provide a family-like school culture, including, community involvement, peer teaching, leadership opportunities, and equal opportunities in extra-curricular activities” (Thompson, 2010, p.8).
Quality Education and Student Achievement	Quality education is at risk with DE. However, B2020 will increase quality education and student achievement	“Left unattended, [DE] will increasingly obstruct our ability to provide quality education to future generations of students” (Boundary 2020, 2007, L. 14-15).	Student achievement is high in small schools. Small schools provide increased quality education	“Students from age 10 to 15 show gains in mathematics, language and reading when they attend small schools with lower student-teacher ratios and shared teaching” (ETFO, 2007, Pa. 7).
Efficiency and Economics	B2020 will alleviate the school board’s financial problems. The grade 7 and 8 transition is more efficient for all stakeholders	“[Through closure and consolidation,] B2020 is an innovative and efficient long term vision for public education” (Boundary 2020, 2007, L. 7-8).	The grade 7 and 8 transition has negative effects on students. Small schools are efficient in their own right.	“While moving grade 7 and 8 students into high schools may be a cost-effective way of addressing DE, young adolescent students will pay the price” (ETFO, 2007, Pa. 3-4).
The Future of Small Rural School Communities	B2020 will strengthen rural communities	“B2020, [through closure and consolidation], presents an opportunity for Eastern Ontario to redefine and strengthen our local communities” (Boundary 2020, 2007, L. 6-7).	Small schools are the symbol of community identity and closing schools will lead to the demise of rural communities	“It is with hope that ribbons wave high, so that children’s voice will one day fly, choosing to live in a community where it is possible to not only reach for the stars, but also to see them” (Carson, 2007, L. 23-30).

Voices of all Stakeholders

Table 4 shows the ongoing debate between stakeholders who are ‘pro Boundary 2020’ and thus believe in closures and consolidations for the good of student learning and communities; versus stakeholders who are ‘pro saving the small rural school’ and thus argue against this type of reform in order to preserve their community schools. In Table 3, these conflicting voices are evident in the opposing Positive and Negative attitudes towards the relevant themes. However, one of the nine themes is agreed upon and viewed positively in all seven documents: voices of all stakeholders. Furthermore, referring back to Table 2, in terms of frequency across documents, the theme of the ‘voices of all stakeholders’ appears consistently in all documents. It is of particular interest that this theme, in itself is a theme of perspectives or interpretations. For instance, the Boundary 2020 (2007) document, which is written by school board officials and intended for parents and teachers, states that: “Everyone has an opportunity and responsibility to participate in the Boundary 2020 process; our students, parents, teachers, administrators, trustees and community leaders” (lines 35-36). By choosing this particular phrase, it is evident that the UCDSB is encouraging all voices to be heard and respected. However, although the intent is evident, it does not state whether or not these voices were later recognized. Furthermore, later documentation shows that although parents and community members voiced their concerns and disapproval of Boundary 2020, the educational officials nonetheless ruled on the implementation of the school closures and consolidations (Thomas, 2010). The importance of exploring the various perspectives involved in Boundary 2020 and whose voice counts in the final decision will serve as a starting point for discussion in Chapter 5.

Summary

In this chapter, I reported the findings that emerged from my document analysis. These results support the findings in the literature (Howley, 1997; Wallin, 2007) which argue that there is a clear debate between global, reform initiatives and local, rural lifestyles and commitments. The findings presented in Table 4 showed four major themes relating to conflicting perspectives surrounding school closure and consolidation: 1) Declining Enrolment and School Size, 2) Quality Education and Student Achievement, 3) Efficiency and Economics and 4) The Future of Small Rural School Communities. These themes will be further discussed in Chapter 5. In addition, the theme of ‘voices of all stakeholders’ was recognized as an umbrella theme under which all other themes gather.

The following chapter delves into the significance of the ‘voices of all stakeholders’ as it relates arguments for and against Boundary 2020, whose voices are heard and respected in final school reform decisions and the effects of these decisions on student learning and small rural communities.

CHAPTER 5

DISCUSSION

Are all Voices Heard and Respected?

All seven of the documents analyzed for this project, namely: 1) *Look at the Stars*, (Carson, 2007), 2) *The Five W's and How of Boundary 2020* (2007) 3) My anecdotal notes (Thompson, 2010) 4) *School closures could hurt their communities, realtor tells board* (Lunman, 2008), 5) *Board's Proposal to Transfer Grade 7 and 8 Students is 'just plain wrong' Say Elementary Teachers* (ETFO, 2007) 6) Message from the Director of Education, David K. Thomas (Thomas, 2010) 7) *Staff and Students Like Grades 7-12 Schools, Surveys Suggest* (Dawes, 2009), encourage various people involved in the present and future of small rural schools (i.e., teachers, students, parents, community members etc.) to speak out and share their opinions and beliefs regarding the Boundary 2020 process. The theme of 'voices of all stakeholders' (VS) corresponds to the literature reviewed for this project, which indicates that the future of small rural schools lies in a move towards listening to local voices (Corbett & Mulcahy, 2006; Hicks, 1999; Newton & Newton, 1992). Newton and Newton (1992), for instance, argue that a positive feature of many rural schools is their *smallness* which should be conducive to rich, continuing dialogue among students, staff and other adults in the community. They emphasize the importance of this continuing dialogue, which they explain requires active listening and suspending one's own beliefs. However, whether or not educational officials and administrators are able to suspend their own beliefs and actively listen to all stakeholders (Newton & Newton, 1992) is difficult to assess.

My findings show that throughout the Boundary 2020 process, the UCDSB argues that everyone has the opportunity and responsibility to participate in this process including students, parents, teachers, administrators, trustees and community members (Boundary 2020, 2007). As per the Accommodation Review Guidelines, the UCDSB undertook a process of consultation, involvement and evaluation to ensure they took a range of factors and views into account when considering school closures and consolidations. Therefore, in theory, many voices are supposedly heard and valued. However, in practice, whether or not, for instance, a community member's voice is equally respected to a school board trustee's opinion is a good question. Only with a linear analysis of the small rural school reform movement, using the Boundary 2020 process as a local example, can we begin to understand the reasoning behind rural school closures, which stakeholders are actively involved in the decision making, the effects of the outcomes on all small rural school stakeholders and the positive and negative responses by stakeholders to these outcomes. Thus, throughout the following discussion, the reader will be able to determine whether ALL necessary voices are truly heard and respected within this process.

Split loyalties: Rural versus School Board Commitments

At the school where I teach, I observed the participation of parents, teachers and community members in the Boundary 2020 process (Thompson, 2010). Various parents and community members attended the ARC meetings and public forums to make presentations to UCDSB trustees against Boundary 2020 (Lunman, 2008). At one particular meeting in Kemptville, on April 30th, 2008, the last public meeting prior to the trustee vote on Boundary 2020 in May of 2008, 70 members of the public attended and

voiced their opinions. Lunman (2008) explains that these participants warned the trustees that the Boundary 2020 “proposal to close 13 schools could cripple small communities across eastern Ontario” (paragraph 1). Similarly, parent and Rideau Lakes Councilor, Anders Carson’s (2007), poem entitled *Look at the Stars*, depicts the reform movement process as “manipulation” (line 14), whereby “governments swing back and forth in power” (lines 3-5), as “teachers watch for that fall” (line 6), and “parents watch for that choice” (line 7). As such, he is describing the parents and teachers as silent bystanders ‘watching’ the government and school board officials take the future of small rural communities into their ‘hands’ and make executive decisions without considering the opinions of others.

Regardless of these rural stakeholders’ petitioning, social action, letters to the school board and shared reflections on the matter of the Boundary 2020 proposal, on May 14th, 2008, the majority of the school board trustees’ vote called for the implementation of the Boundary 2020 plan. As such, in the Boundary 2020 document (2007), the claim that there exists a “collective respect” (line 39) for the viewpoints of others is inaccurate. Rather, the school board officials and trustees are providing rural stakeholders with the chance to share their opinions, but ultimately, the decisions remain in the hands of the officials. Thus, teachers’, parents’, students’, and community members’ voices seemed to be either unheard or ignored by school board officials, resulting in what Giroux and McLaren (1990) term a ‘structured silence.’ In relation to the literature reviewed, which states that within rural school reform movements, as tension continues to increase between rural community lifestyles and priorities and globalizing educational reform

agendas, this Boundary 2020 plan is ultimately serving global objectives at the expense of local community interests.

Howley (1997) expands upon this argument by stating that studies in rural education must consider locally relevant issues that emerge from local experiences and perspectives or embody local dilemmas. For the sake of contrast, he begins by outlining the *cosmopolitan commitments*, which have been unwarrantedly related to rural settings, but do not share rural commitments. People who adhere to these commitments are concerned with: increasing the level of students' aspirations, overcoming resistance to school closure and consolidation, overcoming the disadvantages of students' backgrounds, implementing governmental reforms, offering a broad and deep high school curriculum, insulating the school from local politics, implementing 'best practice' (i.e., nationally validated methods and programs), and changing the local culture. These commitments are evident in the Boundary 2020 (2007) official document, the school board's research article (Dawes, 2009) and the director's message (Thomas, 2010). The Boundary 2020 document, for instance, states that without this reform, "this situation will increasingly obstruct our ability to provide quality education to future generations of students" (lines 14-15), which corresponds to the cosmopolitan commitments for implementing 'best practice' and overcoming resistance to school closures and consolidations.

In comparison, Howley (1997) outlines local *rural commitments*, which should be considered when conducting educational research and/or reform in rural areas. These rural priorities are as follows:

Senses of and attachment to rural places; the relationship between school and community sustainability; proper aims for an education committed to rural

community; rural pathways to rural adulthoods; community engagement in rural schools; rural community and educational stewardship; curricula to sustain rural places; small-scale organization in rural schooling and community; and cultivation of appropriate local meanings, knowledge, and commitments (p. 7).

These rural commitments are evident in my findings, within the documents written by teachers, parents, community members and union representatives. In Carson's (2007) poem, for instance, he depicts a community where "children's voices will one day fly" (lines 24-25), and one can choose "to live in a community where it is possible not only to reach for the stars, but also, to see them" (lines 26-30). This text relates to the following rural commitments: sense of and attachment to rural places, rural pathways to rural adulthoods, and cultivation of appropriate local meanings, knowledge and commitments (Howley, 1997).

The results of my study as well as the literature reviewed indicate an array of perspectives on the present and future of small rural schools. In the following subsections, I outline the specific groups of people and the ways in which they create shared meaning when it comes to reform efforts, such as Boundary 2020.

Parents' voices

As depicted in my anecdotal notes, I found that many parents wanted to be directly involved in the educational change reform dialogue (Thompson, 2010). At the public forum in Kemptville on April 30th, 2008, one particular parent, Scott Burns, told trustees and school board officials that a previous school closure in Delta, Ontario, five years prior, had "devastated that community" (Burns as cited in Lunman, 2008, paragraph 2). He explained that "the studies (on the economic impact of school closures in small communities) have not gone far enough" (Burns as cited in Lunman, 2008, paragraph 6). In his poem, another parent, Anders Carson (2007), describes the effects of

school consolidation and closure as a “cry of long distance learning” (line 10) and “tears of flags being lowered” (line 11). Thus, the documents analyzed show that once a community is facing the uncertain fate of school closure or consolidation, many parents tend to speak up and voice their opinions regarding the future of their school and ultimately their community.

Prior to the possibility of closure or consolidation, however, the research shows that parents are not as willing to share their opinions on school reform and improvement. In 2009, for instance, the Declining Enrolment Working Group of Ontario consulted with key education stakeholders, other organizations and the public, including parents, in order to discuss ways in which Ontario’s education community could continue to improve student achievement, while addressing the impact of declining enrolment. In terms of the parent voice, the DEWG states difficulty in engaging parents and the wider public in a dialogue about declining enrolment. They suggest that this is partly due to the fact that many parents believe that declining enrolment leads directly to school closures, which educational stakeholders believe can have an economic impact on the community (DEWG, 2009). This perspective is justified by research indicating that declining enrolment is a major factor in small rural school closure and consolidation decisions (People for Education, 2008; Wallin, 2007).

In their discussion of declining enrolment in Ontario, the People for Education of Ontario (2008) indicate that due to this phenomenon there are 300 schools across Ontario involved in Accommodation Reviews. These reviews involve consultation, participation and evaluation to ensure school boards take a range of factors and views into account when considering closures and consolidations (People for Education, 2008). The People

for Education state that since the inception of the Accommodation Reviews, “many parents have expressed disappointment at the results of reviews, because (school) boards, often hamstrung by provincial policy and funding, are unable to implement many review recommendations” (People for Education, 2008, p. 6). For instance, since the implementation of the ARCs, the province has provided school boards with a Declining Enrolment Grant, which is a temporary transition grant to allow boards to adjust their staffing and expenses as enrolment declines. However, provincial policy has not changed regarding the number of students required to generate staff in the funding formula, despite steep declines in average school enrolment (People for Education, 2008).

Similarly, in their consultations, which included parents, the Declining Enrolment Working Group (2009) of Ontario heard several concerns about the ARC process. Many consultation participants stated that the process was too lengthy and complex, and thus not beneficial in terms of increased public understanding about declining enrolment or engagement in the process. “Public disclosure of information, it was claimed, led to disputes about the information’s accuracy and assessments of different schools’ ‘value to the community;’ it pitted one school against another; and the outcome was often seen as predetermined” (DEWG, 2009, p. 35). Specifically with the school valuation aspect of the ARC process, there were concerns that committees were seen less as engaging the public and more as a technical group that focused on completing the school valuation report. The DEWG, thus, argue that a review of the Accommodation Review process is required, in order to increase public dialogue about and engagement in the issue of declining enrolment.

Teachers' voices

With regards to their perspectives on small rural school closures and consolidations in Ontario, teachers find themselves in a controversial position due to the fact that they are both paid employees of the school boards and members of the school culture. Moreover, certain teachers may also live in the surrounding community, while others may commute from other areas. At the school where I teach, one teacher out of 5 staff members is an actual resident of this community and a parent of students at our school. Depending on their personal connections to the community and their involvement in the school culture, teachers' opinions may differ regarding small rural school reform movements. Furthermore, my findings suggest that many teachers have difficulty voicing their points of view in a public forum (Thompson, 2010). One productive and efficient way teachers can share their opinions and knowledge of small rural school reforms is through research initiative, as is the case with this study.

In December of 2007, elementary school teachers launched a campaign to underline the harmful effects on young adolescents resulting from the UCDSB proposal to transfer grade 7 and 8 students to high schools (ETFO, 2007). ETFO states that various forms of media including, newspaper and radio ads, brochures and a website (www.protectourkids.ca) deliver the message that “elementary schools offer a better and safer learning environment for young adolescent children, an environment less open to bullying and more closely connected to the local community” (ETFO, 2007, p.1 lines 5-7). With regards to the pending grade 7 and 8 transitions to high schools, President of ETFO David Clegg (2007) stated: “The young students will spend more time on school

buses, face the pressure of older, more mature students, and lose the many benefits that can only be provided in elementary schools” (lines 12-14).

In May 2008, at the conclusion of the Boundary 2020 review, the Board of Trustees decided to close a number of elementary schools, increase student access to French language programs, adjust certain school attendance boundaries and begin grades 7-12 structures at some schools (Thomas, 2010). In response to this decision various teaching staff informally voiced their opinions amongst one another. Outlined in my anecdotal notes, through discussions with teachers within my family of schools (comprised of four schools), teachers had differing points of view regarding the outcome of the Boundary 2020 process. Some teachers at my school expressed concerns that the grade 7 and 8 move would deplete the population of the school so severely that the school would no longer be able to function and would ultimately close (Thompson, 2010, p. 14). Certain teachers at other schools in our family of schools supported the consolidation movement and saw this as a career opportunity to teach in the grade 7 and 8 portion of the high school (Thompson, 2010, p. 15). Teachers in our family of schools voiced concerns and questions regarding the ins and outs of the grade 7 and 8 transition and what this move would entail for grade 7 and 8 students’ education and well-being (Thompson, 2010, p. 17).

As a teacher affected by the Boundary 2020 reform initiative, I sought to find the rationale behind this ‘improvement plan.’ I began with the Five W’s and How of Boundary 2020 (2007). This document explicitly states that declining enrolment within the UCDSB runs the risk of schools falling short of the board-wide 90% graduation objective by the year 2020. Hence, the title Boundary 2020 strategically implies that by

implementing the aforementioned initiatives, the school board will achieve its graduation goal for the year 2020. I have developed concern for this cause-effect reasoning, based not only on my document analysis, but in relation to my firsthand experience at a formal address by the director of the school board to all the school board staff during a board-wide staff meeting via Skype in 2007. I found his delivery particularly troublesome in that he rationalized striving for a 90% graduation rate based on the fact that the many other Ontario school boards were ‘only striving for 80%.’ By setting a particular universalized standard, under the pretense of an ‘objective’ for the schools, school board officials are first, attempting to locally implement a globalized agenda without consideration of context and second, they are adhering to the discourse of student achievement for human capital and international competitiveness.

In October of 2009, in relation to this school board ‘objective,’ our staff room was outfitted with a four foot by three foot poster reading ‘90% - What have you done for your students today?’ Most teachers were insulted by this question and felt that it demeaned their professionalism and value as teachers. One teacher voiced his opinion by asking the rhetorical question, “Why fix something if it’s not broken?” (Thompson, 2010, p. 7). These teachers continued to question the school board’s rationale. Another teacher asked: “Are they striving for 90% to ‘better’ the students’ education and futures or are they just in competition with the school board next door?” “Are these changes in the students’ best interest or are they just for show?” (Thompson, 2010, p. 7).

In a recent staff meeting, the teachers were privy to a video clip entitled *Changing Education Paradigms*. In this video, Sir Ken Robinson explains that every country in the world is reforming public education based on two major questions: “How do we educate

our children to take their place in the economies of the 21st century?” and “How do we educate our children to be aware of their cultural identity amongst globalization?”

Consequently, reformers are using the strategies they used in the past (i.e., creating bigger and better schools where students will receive University degrees and obtain jobs) to implement changes in the present. As a result, the current system of education was designed and conceived for a different age and economic circumstance, the age of the industrial revolution. As such, this system is modeled on the interests of industrialization, such as the production line mentality, whereby schools are concerned with conformity and standardized testing. Schools are organized on factory lines, with ringing bells and separate facilities, specialized into separate subjects. Children are still educated by batches or age group, which assumes that the most important thing children have in common is their shared age (Robinson, 2010). A researcher in situated cognition, Darwin (2006), expands on these perceptions by stating that schools have been and continue to be designed to meet learners’ needs in chronologically organized, age-appropriate ways that are thought to match points in their cognitive development. This standardization is also a product and factor of globalization.

After viewing this video clip, as a staff, we discussed how small rural schools have started changing the paradigm by circumstance, but now we advocate for this by choice. We agree with Darwin’s (2006) argument that this aforementioned view of schooling continues to be one of the most dangerous underlying assumptions to plague our school system. As teachers, we believe each student learns differently. Some students benefit from group learning, while others prefer to learn independently. Some students enjoy teaching their peers, while others benefit from peer learning. My colleagues and I

discussed that small rural schools are in an ideal position to steer away from grouping students by age and organizing schools like factories (Thompson, 2010). A shared characteristic of small rural schools around the world is multi-graded classrooms (Mulcahy, 1993). Moreover, Canadian research clearly indicates that multi-grade classrooms are a viable, effective organizational alternative to single grade classes (Gomolchuk, 1995). As a staff, we discussed the various benefits of multi-grade classrooms, including peer tutoring, differentiated learning and innovative teaching (Thompson, 2010, p. 17). My findings concur with Gomolchuk's (1995) argument that multi-grade classrooms lead to greater levels of cooperation among students, individualized instruction, and reduced discipline problems. In smaller groups, Corbett and Mulcahy (2006) explain that students feel more integral and teachers understand students as individuals: their interests, their comprehension of ideas, the challenges they face, what gifts they have to offer and most importantly, their learning styles. The small-scale organization of rural schooling is one of the rural commitments to which Howley (1997) refers.

Regardless of the research, most policymakers and educational officials view characteristics of small rural schools, such as multi-grade classes, as 'issues' or 'challenges' and thus believe closures and consolidations to be a solution to these rural problems. This point of view adheres to the assumption that bigger schools are more fiscally and academically efficient. However, Howley argues that rural issues and dilemmas are obscured by national and cosmopolitan practices and we need to recognize that improvement initiatives are driven by a logic of globalization, which in turn leads to a disregard of the diversity of rural places. In the same line of thought, American rural

researchers Nachtigal and Theobald (1995) and Bard et al. (2006) as well as Canadian researcher Wallin (2007) concur that small rural school closure and consolidation ‘improvement’ plans are the outcome of globalization, international competitiveness and a move toward a universalized view of schooling.

In terms of teachers’ role or lack thereof in these ‘improvement’ plans, this globalized view of education has led to a reduction of teachers’ autonomy, independence and responsibility, whereby workplace knowledge and control are in the hands of administration (Stromquist & Monkman, 2000). Therefore, educators are not only continually losing the right to determine what is taught and how to evaluate its merit, with the rise of a standardized curriculum, but we are also caught between what the school board *tells* us to think with regards to reform movements and what we actually *believe* is best for the education of our students.

Students’ voices

Of *all* stakeholders involved in small rural school closures and consolidations, it is ultimately the students who are most affected by these reforms. They will be the people who have to commute for up to two hours a day. They will be the people who do no benefit from learning in their *own* community. They will be the people who transition from small, family-knit classrooms, to a larger business-like setting. Therefore, the student voice should be respected and acknowledged, prior to reform decision making.

At the school where I taught and continue to teach, during the Boundary 2020 process, when our school was being reviewed by an ARC, the staff were aware of the various stakeholders involved in this process, including students. Thus, we organized a committee, comprised of all teaching staff, our principal, two Educational Assistants, our

office administrator (who was also a member of the community), two parents and four students between grades 4 and 8. At one of our meetings, we asked the students the following three questions: “Describe your perspective on our school’s strengths?” “Describe your perspective on our school’s areas of need or weaknesses?” and “Explain what you believe are the ‘next steps’ for this school?” (Thompson, 2010, p. 3) The students brainstormed amongst themselves and with the various stakeholders at the meeting. They wrote their ideas on chart-paper and presented their opinions to us. Through this presentation, we learned that the students were very happy with our school. They enjoyed the family nature of the school. They appreciated that the teachers cared and took the time to get to know their students. We also learned that they were worried about what was going to happen to this school. They had heard so many different opinions in the media, at home and amongst their peers that they were not sure what to believe. This committee was essential to the well-being of our school. The fact that the student voice was not only heard, but respected and appreciated, was crucial to the future of our school. After this meeting, we took the students’ notes and discussed them at our staff meeting. From here, we were able to preserve our school culture (our strengths) as well as implement the students’ specific ideas for next steps (Thompson, 2010).

Similarly, my findings suggest that teachers, parents and community members encourage student involvement in the reform process. In his poem, “Look at the Stars,” when Carson writes, “It is with hope that ribbons wave high, so that children’s voices will one day fly. Choosing to live in a community where it is possible to not only reach for the stars, but also to see them” (lines 24-30), he is expressing his desire, not only for students to have a voice, but to also have the choice to live and learn in their home town.

My findings also show that, during the Boundary 2020 process, students had the opportunity to voice their opinions in a public forum. Lunman (2008) refers to one particular Grade 12 student who spoke up regarding the reform efforts in his community. James Ward, a student asked the UCDSB trustees how the grade 7 and 8 consolidation with the high school would affect a ‘typical day’ at the high school. He was concerned about how the already full computer labs, gym classes and cafeteria would accommodate for more students. Ward was one of the first students able to voice his concerns to the trustees at public meetings on Boundary 2020. Although this particular student had his say, the article does not explain whether or not his questions were answered or his concerns were addressed.

In September of 2009, the UCDSB conducted two surveys on the 10th day of classes at the new grades 7-12 and K-6 schools. Participants included 30 principals, vice-principals and systems managers (Dawes, 2009). Although Dawes (2009) claims that these surveys “suggest staff and students like their new grades 7-12 high schools and K-6 elementary schools” (line 1), there is no mention of actual student involvement in these surveys. Therefore, additional research is required to study the effects of these closures and consolidations on student learning and well-being. This is in line with researchers such as Bard et al. (2006) who believe that policymakers ought to consider the implications of consolidation on student achievement, self-concept, participation in extracurricular activities, dropout rates and the community itself.

Newton and Newton (1992) outline the conditions, advantages and disadvantages of small schools in sparsely populated areas. The purpose of their book is to emphasize the importance of listening to rural stakeholders and developing a shared vision regarding

school development through stronger leadership. In their *Voices* chapter, they analyze a survey conducted in the Big Valley School Division, in Saskatchewan, for students, parents, community members and teachers. The resulting data of this survey underlines the importance of listening to all partners in the educational process. Their research indicates that, of the groups of stakeholders (parents, teachers and students), students were the least satisfied with their current school situations. Therefore, they explain that the student voice must be heard with regards to the selection of content, strategies for learning and assessment. They believe that once student voices are better heard, this will be a starting point for the redesign and revitalization of small rural schools. Hicks (1999) adds to this opinion by stating that in comparison to large, urban schools, rural schools are in an ideal position to listen to the student voice and embrace student-focused school reform due to their unique small size. Furthermore, “rural schools with the advantages of smaller size and opportunity for meaningful community are fertile ground for the positive growth and the development of learner-centered schools and places where the voices of children can offer honest insights into the meaningful direction of school renewal” (Hicks, 1999, p. 187).

Whose Voice Counts?

My findings suggest that despite a seemingly “open and honest dialogue” (Boundary 2020, 2007, line 20) with all stakeholders involved in the reform decision process, including parents, community members, teachers and students (Boundary 2020, 2007; Dawes, 2009; Lunman, 2008; Thomas, 2010), the final decision lies in the hands of school board officials, who ultimately follow their initial agenda and mindset. Thus, my findings indicate that although all voices may be heard, they are not acknowledged in the

decision making process. This concurs with research that states that regardless of the developments in rural education research and studies pertaining to the benefits of small schools, when it comes to perceptions of the future of small rural schools, local voices tend to be silenced and replaced with government and school board discourse advocating for small school closures and consolidations (Giroux & McLaren, 1990; Howley 1997; Wallin, 2007). Furthermore, Howley (1997) argues that most rural reform decisions are still adhering to a standardized, globalized model. Similarly, Eisner (2005) is concerned that many perspectives on the purpose of education tend to focus on the global education of citizens, instead of the local, unique learning experiences of the individual.

Today the school where I teach, as well as various small rural schools across the UCDSB, continue to feel the repercussions of a standardized, globalized school improvement plan, Boundary 2020, as imminent changes loom in the near future. As of September 2009, certain schools have undergone school consolidations, as their grade 7 and 8 students have transitioned to the local high school, thus, leaving these schools with a student population comprising Kindergarten to grade 6 students. As a result, 13 schools have not survived this student depletion and have been forced to close because of under-population (Thomas, 2010). The current discourse at the school where I teach is that in September of 2011, the grade 7 and 8 students will transition to the local high school, leaving this school with a population of less than 60 students from Kindergarten to grade 6. Following this move, it is up to policymakers and administrators to ultimately decide whether this school is fiscally and viably worth saving. In addition, it is increasingly troublesome that the fate of these small rural schools, and hence their surrounding

communities, lies in the hands of people with an agenda that does not mesh with the rural commitments inherent in the lives of the people of these towns (Howley, 1997).

Many rural researchers concur that until policymakers and school board officials view the rural educational context from a rural perspective, schools closures and consolidations will continue to increase at the expense of the local rural communities (Howley, 1997; Wallin, 2007). This tension between rural priorities, lifestyles and commitments and standardized, globalized agendas is evident in my document analysis, whereby ‘pro saving small schools’ arguments relate to the former and ‘pro Boundary 2020’ arguments relate to the latter. These conflicting perspectives are also found in recent research analyzing the rationale behind these closure and consolidation initiatives, studies demonstrating the value and viability of many small rural schools and rural community responses to closure and consolidation initiatives (Corbett & Mulcahy, 2006; Jimerson, 2006; Howley, 1997a; Wallin, 2007).

The Closure and Consolidation Issue

In the following sections, I discuss the four major themes uncovered in my findings, namely: *Declining Enrolment and School Size; Efficiency and Economics; Quality Education and Student Achievement* and *the Future of Small Rural School Communities*. I analyze these themes as they relate to the closure and consolidation of small rural schools.

Declining Enrolment and School Size

With regards to small rural school closures and consolidations, my findings as well as most research in the field of rural education concur that the main issue brought to the small rural school reform table is declining enrolment, with is directly related to

school size (Bard et al., 2006; Boundary 2020, 2007; Declining Enrolment Working Group, 2009; People for Education, 2008; Wallin, 2007). The Boundary 2020 document and the director's address explicitly state that declining enrolment within the school board runs the risk of schools falling short of the board-wide 90% graduation objective by the year 2020 (Boundary 2020, 2007; Thomas, 2010). By setting a particular universalized standard, under the pretense of an 'objective' for the schools, school board officials are attempting to locally implement a globalized agenda without consideration of context (Howley 1997; Wallin, 2007).

With regards to Boundary 2020, ETFO, draws attention to the UCDSB's main reason for moving grade 7 and 8 students into secondary schools: it is a "cost-effective way of addressing declining enrolment" (ETFO, 2007, lines 8-9). However, they argue that "young adolescent students will pay the price" (ETFO, 2007, lines 9-10). ETFO president David Clegg warns that these "young students will spend more time on school busses, face the pressure of older, more mature students and lose the many benefits that can only be provided by elementary schools" (ETFO, 2007, lines 12-14). This is a steep price to pay for a reform that is based on an issue (declining enrolment) that is affecting not only the school board and province, but Canada as a whole.

"According to Statistics Canada, the number of students in Canada's elementary and secondary schools will decline by as much as 500,000 in the next 15 years" (People for Education, 2008, p. 6). As the student population decreases, many reform advocates argue that it becomes more expensive to run schools. The cost of running a school with fewer than 100 students is 29% higher on a per student basis than the cost of running a school with more than 300 students (Canadian Council on Learning, 2006). Thus, the

issue of school size is linked with fiscal arguments for school closures and consolidations.

The People for Education (2008) explain that in rural and northern areas there is a more extreme decline in enrolment, caused by a combination of birth rate declines and migration to urban and suburban areas. This affects funding and communities, whereby most of the funding school boards receive is based on numbers of students, enrolment declines mean less funding, fewer programs, and, in many cases, school closures (People for Education, 2008). Therefore, declining enrolment seems to have a ripple effect, leading to various other 'challenges' that are viewed as synonymous with 'small schools.' Fewer students lead to smaller schools with multi-grade classrooms. Smaller schools lead to financial cutbacks. Financial cutbacks lead to schools sharing principals and the domino effect continues. However, the research indicates that the issue of declining enrolment is *not* simply a 'rural' issue. The entire province of Ontario, for instance, is facing declining enrolment. Due to declining fertility rates, school enrolment is declining (People for Education, 2008). The Ministry of Ontario has deemed this issue so important that it has established a Declining Enrolment Working Group (2009). This group is not limiting its concern to rural areas. Rather, the issue of declining enrolment has become a provincial concern for schools in urban, rural and suburban areas. If we relate this provincial issue to the previously described viewpoint that declining enrolment leads to school consolidation, does this mean that schools will be consolidated in every district across Ontario? Should we be taking away communities' centres of learning and livelihood just because people are having fewer babies?

Many Canadian and American researchers have found that there is little to no evidence to suggest that larger, urban schools are more efficient and beneficial for student learning than smaller, rural schools (Corbett & Mulcahy, 2006; Cotton, 1996; Jimerson, 2006). Furthermore, there is little if any justification for closing small schools as a matter of policy (Corbett & Mulcahy, 2006). Therefore, this ‘bigger is better’ mentality, whereby students attend larger, mega-schools to be educated as ‘human capital’ to contribute to the nation’s well-being often comes at the expense of the local rural community’s interest of preparing students for life (Bard et al., 2006). As such, many rural education researchers concur that the closing and consolidation of these small rural schools should not be seen as the one and only ‘solution’ to the challenges that small rural schools face, such as declining enrolment (Corbett & Mulcahy, 2006; Mulcahy, 1993; Wallin, 2007). Rather, researchers such as Bard et al. (2006) believe that policymakers ought to consider the implications of consolidation on student achievement, self-concept, participation in extracurricular activities, dropout rates and the community itself.

Efficiency and Economics

As a result of declining enrolment, the UCDSB officials claim that the school board has more schools than are needed for the number of students within the board (Boundary 2020, 2007). This is the case for many school boards across Ontario. Evidently, schools with smaller student populations cost more to operate per student than those with a larger number of students (DEWG, 2009). Therefore, UCDSB school board officials argue that Boundary 2020 is an efficient, cost-effective move for quality education (Boundary 2020, 2007; Dawes, 2009; Thomas, 2010). However, regardless of

the Boundary 2020 vision to “ensure an equitable and seamless educational journey for each student” (Boundary 2020, 2007, lines 30-31), guided by school closures and changes to school boundaries, this reform will result in the closure of 13 schools by 2012, the incorporation of grades 7-12 structures at some high schools and the creation of Junior Kindergarten to grade 6 schools (Thomas, 2010).

With a rise in the global flow of ideas, practices, institutions and people across the world in an unprecedented volume, the mobility of educational practices and ideas and the institution of schooling has followed suit (Anderson-Levitt, 2003). The trend toward globalized conceptions of schooling has led to discussions of educating students as human capital in an efficient and fiscally beneficial manner in ‘bigger’ and ‘better’ schools (DeYoung, 1987; Howley & Howley, 2004; Wallin, 2007). Consequently, many small rural schools have been and continue to be closed or consolidated into larger schools.

Corbett and Mulcahy are amongst the many Canadian and American researchers who have begun to investigate the reasoning behind contemporary small rural school closures and consolidations and the drive for bigger, better schools (Bard et al., 2006; Corbett & Mulcahy, 2006; Wallin, 2007). The literature suggests that reorganization initiatives are proposed by people with power, namely school board officials and policymakers, who, with a globalized mindset, often perceive small rural schools to be inefficient, fiscally unstable and offer limited curricula. This perception stems from the fact that many North American rural areas share similar circumstances including, economic challenges, birth rate declines and out-migration (Bard et al., 2006; Mulcahy, 1993; People for Education, 2008). As a result, contemporary policymakers develop

school reform agendas for both American and Canadian contexts under the rhetoric of ‘improving’ the rural situation (Bard et al., 2006; Wallin, 2007). Moreover, most small rural school consolidation dialogue tends to intertwine these rural challenges with the previously described major themes of declining enrolment and school size; efficiency and economics; student achievement and quality education and the future of small rural communities (Bard et al., 2006).

In the United States, due to the adoption of globalized ideals, such as the efficiency of the private sector, a major factor driving the long-term consolidation trend has been school administrators’ and educational officials’ desire to make schooling efficient in order to demonstrate their commitment to the forces of science, progress, modernization and globalization (Cotton, 1996). Giroux and McLaren (1990) add to this discourse by suggesting that the situation of rural schools in America needs to be understood in light of the current celebration of market initiatives and linking of schooling to entrepreneurial forces within marketplace logic. In this respect, small rural schools are being consolidated into larger, business-like schools, which Sergiovanni (1996) explains are created to mirror the corporate world in terms of their departmentalization and fragmentation.

The National Rural Education Association (NREA) Consolidation Task Force associates small rural school consolidation to globalization and international competitiveness. They state that the general consensus among educational reformers is that ‘bigger is better’ and the elimination of small schools will result in increased cost-effectiveness and greater curricular offerings (Bard et al., 2006). Furthermore, the NREA discusses the clear division between school officials who point to the inefficiencies and

more limited curricula common to small rural schools versus community members who argue that the loss of the school means the loss of the community.

These nationalized and globalized ideals counter Howley's (1997) conceptualization of rurality by rejecting rural meanings and identities for global interests. Howley argues that the commitment to forms of education that sustain local communities as thoughtful cultures is dwindling and being replaced by school improvement initiatives that are nationalizing and globalizing. In terms of the conflict between globalized ideals and local interests, Theobald and Nachtigal beg the question:

Will schools that would sooner use blackboards than computers, teachers who would concern themselves with ideas more than employment, and parents who prefer the happiness of their children over a good return upon human capital, continue to be seen as 'willful primitives,' in this global society? (Theobald & Nachtigal, 1995, p. 3).

In order to answer 'no' to the above question, they advocate for a return to community-centred rural schools. The idea of community learning and the positive nature of community-centred rural schools will be further discussed in a later section.

'Quality' Education and Student Achievement

My findings suggest that many small rural school reformers subscribe to the view that larger schools lead to increased student achievement and improved quality education (Boundary 2020, 2007). With regards to declining enrolment, the UCDSB officials argue that this "situation will increasingly obstruct our ability to provide quality education to future generations of students" (Boundary 2020, 2007, lines 14-15). Thus, they view this situation as detrimental to quality education and thus argue for small school closures and the creation of larger schools in the name of 'quality education.'

In the initial phases of the implementation of Boundary 2020 for the creation of grades 7-12 schools, the UCDSB officials conducted a survey of 30 principals. The survey showed that these principals believed staff members reacted positively to placing grades 7 and 8 students in a grades 7-12 school. They claimed that this survey suggested that staff and students “like their new grades 7-12 high schools” (Dawes, 2009, lines 1-2) and “these changes are helping student learning” (Dawes, 2009, lines 6-7). Correspondingly, Corbett and Mulcahy (2006) argue that many Canadian educational officials subscribe to the outdated view that bigger schools provide better quality education, exemplified in so-called higher student achievement. Some research, however, refutes this perspective.

Studies show that there is no significant difference in terms of achievement between smaller and larger schools (Barley & Beesley, 2007; Corbett & Mulcahy, 2006). Moreover, there is no research evidence that ‘bigger’ schools are ‘better’ for students (Bard et al., 2006; Corbett & Mulcahy, 2006). First, bigger schools often result in large, unmanageable, impersonal settings for students (Hicks, 1999). Second, more program offerings of larger schools do not equal a higher quality of education. Third, in terms of the curriculum issue, the studies show that the broader curriculum of the larger schools does not, necessarily, have a positive effect on student achievement (Corbett & Mulcahy, 2006).

Carnoy (2000) explains that this emphasis on standardized testing and curricula and quality education is partly due to a rise in globalized ideals of schooling. Moreover, previously described corporate criteria of ‘efficiency’ and ‘productivity’ have extended to the world of schooling and are manifested in quantitative measurements of student

performance, namely standardized tests (Carnoy, 2000; Stromquist & Monkman, 2000). Eisner (2005) is concerned that boosting test scores and standardizing outcomes are the dominating values currently guiding school reform efforts in North America. In Ontario, for instance, the government focuses on test scores in literacy and numeracy and graduation rates as the two measures of success in provincial education policy (DEWG, 2009; People for Education, 2008, p.6). As such, “the fundamental goal of education in Ontario is the continuous improvement of student achievement” (DEWG, 2009, p. 26). In this regard, many schools that do not meet the pre-set ‘standards’ are labeled as ‘needing improvement’ and must face educational reform agendas. These agendas are proposed by policymakers and school board officials under the guise of promoting educational ‘efficiency,’ ‘effectiveness’ and ‘productivity.’

In the school where I teach, the grade 3 and 6 students are involved in the standardized test of EQAO. This test rates schools in terms of the percentage of students who have achieved a level 3 or higher on the exam. As evidenced in my findings, the results of this test cannot be viewed as an accurate measurement of student learning since there are not enough students writing the test (6-10 students per grade) to show an informative percentage (Thompson, 2010, p. 16). Moreover, I adhere to Corbett and Mulcahy’s (2006) argument that the mentality that educational performance is standard and can be measured un-problematically is a myth. Rather than focusing on standardized testing, the evidence suggests that we should be acknowledging the idea that schools function to produce capable, literate, caring, engaged life-long learners who are prepared for full participation in a rich community life and satisfying employment (Corbett & Mulcahy, 2006).

Despite this research evidence that bigger schools are *not* better schools and standardized testing is not an accurate measurement of student learning and well-being, policy makers continue to pursue the closure and consolidation of small neighborhood and community schools under the pretense that larger schools will provide increased quality education and higher test scores (Boundary 2020, 2007). They pursue this agenda apparently unaware that the educational community has moved on from this mid-twentieth century ‘bigger is better’ view toward embracing the educational opportunities available to students in small rural schools (Corbett & Mulcahy, 2006). Corbett and Mulcahy state that although educational leaders claim to draw upon evidence based decision making, many seemingly ignore the growing body of evidence that clearly indicates that smaller schools are to be preferred over larger ones (Corbett & Mulcahy, 2006).

The Future of Small Rural School Communities

As is evidenced in my findings, under the original theme of learning in small rural schools (LSS), the results show that this theme (The Future of Small Rural School Communities) is predominantly viewed in a positive light. Various rural stakeholders believe that small “elementary schools offer a better and safer learning environment for [students], an environment less open to bullying and more closely connected to the local community” (ETFO, 2007, lines 5-7). As previously discussed, improving student achievement is a fundamental goal of education in Ontario. However, the Declining Enrolment Working Group (2009) describes this goal as a “holistic goal [that] encompasses both measurable academic achievement in areas such as literacy and numeracy and graduation rates and the development of character, a sense of community,

and citizenship skills” (p. 26). To attain this goal, the DEWG suggests that schools provide students with a wide range of programs and services.

In terms of the *small* school culture, studies show that, in smaller schools, all students, regardless of their ethnicity or place on the socioeconomic ladder, tend to achieve at higher levels, have a greater sense of belonging, feel safe, are less likely to drop out, and are more likely to participate in extracurricular activities and go on to college (Corbett & Mulcahy, 2006). At the school where I teach, for instance, the small, nurturing, family-like culture of the school fosters a safe and caring environment for students. Students engage in school activities, such as sports teams, spirit assemblies, excellence assemblies, local drama and story-telling presentations and the annual Christmas concert and community potluck (Thompson, 2010). They show enthusiasm towards and devotion to their school culture. Similarly, one particular study found that small school students were more satisfied with their schools and as such, they became engaged learners and assumed positive roles in school life (DeYoung, 1987).

At the school where I teach, during spirit assemblies, the smallness of the school is conducive to a cooperative and friendly setting. The school is divided into eight spirit teams, each consisting of a grade 8 leader and a *mélange* of students from various grades. Each assembly has a theme (i.e., Halloween activities, bullying awareness, etc.) and a planned activity led by a grade 8 student, such as shared reading, pumpkin carving, creating an anti-bullying song and so on. The setting and activities enable students to become engaged with peers of all ages and provide leadership opportunities for the older students (Thompson, 2010, p. 8).

The small nature of our school ensures that students will participate in the sport of their choice. In some instances, the younger students are asked to join in with the older students in order to make up a full team. This allows for the cultivation of younger athletic talents. Despite our small size, the intermediate girls' soccer team and basketball team won the regional soccer tournament in the fall of 2009 and the regional basketball tournament in the winter of 2011. In 2009, I coached the intermediate girls' volleyball team at our family of schools tournament. Although the girls did not move on to the finals, they displayed dignity, maturity, sportsmanship and teamwork throughout the day (Thompson, 2010, p. 10). This example of good character is merely one of many instances contributing to the positive reputation of which the director of our school board spoke, when he came to our school in April of 2010. He said that this is "a great little school" and you are "doing good things here" (Thompson, 2010, p. 14).

Over the past few years, the students at my school have attended various drama, music and poetry presentations within the school. As in a community-centred school, as Theobald and Nachtigal (1995) would call it, various community members have shared their talents with the students. In the fall of 2009, a local storyteller came to the school to share local folklore about the community (Thompson, 2010, p. 9). In the spring of 2010, the students attended 'jam sessions' with a local song writer, who guided the students in writing a school anti-bullying song. This song was later recorded and saved to the student drive of the school computers (Thompson, 2010, p. 15). These examples concur with the studies showing that, although small schools may offer fewer programs in terms of quantity, in terms of quality, as evidenced in my findings, they tend to be much more inclusive and open to all students as suggested by Corbett and Mulcahy (2006).

Despite the above examples of the value and viability of my Kindergarten to grade 8 school, this school will face drastic changes in the fall of 2011, when our grade 7 and 8 students move to the *high* school. Concerns for this change, stem from my findings that show that “students from age 10 to 15 show gains in mathematics, language and reading when they attend small schools with lower student-teacher ratios and shared teaching – all factors more common in *elementary* schools” (ETFO, 2007, lines 19-21).

Overall, the Canadian educational research indicates that small schools offer the children of these rural communities their best chance of success (Corbett & Mulcahy, 2006). Moreover, they appear to be somewhat superior to larger schools in terms of cooperative learning, extra-curricular participation, quality of school activities, inclusion and mediating the effects of socio-economic status (Mulcahy, 1993). Furthermore, the research supporting the effectiveness of small schools in providing students with inclusive learning opportunities continues to grow (Corbett & Mucahy, 2006). Therefore, I agree with Mulcahy’s position that rather than closing these schools, educational leaders should be searching for ways to sustain and improve these important rural assets (Mulcahy, 1993). Jimerson (2006) adds to this by stating: “Small schools are intrinsically disposed to offer educational and social advantages for children [and] the ongoing battle to close smaller schools is unnecessary and unwise” (p. 17). Similarly, in the United States, the National Rural Education Association (NREA) Consolidation Task Force has been established to spearhead educational research of rural schools facing possible consolidation. In their 2006 Rural School Consolidation report, the task force ascertains that closure and consolidation should be a decision made by the local school

districts, which examine in depth the implications of fiscal, educational, and community advantages and disadvantages (Bard et al., 2006).

My findings show that school closures have the potential to devastate communities. Thus, the major theme of ‘the future of small rural school communities’ is regarded as most important by the ‘pro saving small schools’ stakeholders. These stakeholders warn of the negative effects of closures and consolidations on small rural communities. In Lunman’s (2008) article, a Rideau Lakes Township realtor explains that since the closure of the school in Delta Ontario, the housing market has diminished, two of the community’s three restaurants have closed and the bank has closed. Members of the surrounding communities state that this once thriving town appears to be a ghost town (Thompson, 2010). Despite the blatantly obvious evidence that school closures and consolidations do not benefit local rural communities, the UCDSB officials argue that Boundary 2020 “is more than just a school closures/boundary review. It presents an opportunity for Eastern Ontario to redefine and strengthen our local communities through an innovative and efficient long term vision for public education” (Boundary 2020, 2007, lines 6-8). My inquiry regarding this particular objective is: How can closing a rural community school strengthen the community? In my opinion, the answer seems obvious considering that, as shown in my findings, the many rural communities that have undergone the closure of their local school have suffered socially and economically (Lunman, 2008). Thus, a “redefinition” or “strengthening” of local communities is an invalid justification for removing the life-line of a community. Rather, UCDSB officials’ attempts to justify board-wide school closures and program cuts over the next two years will have potentially harmful implications for small rural towns across Eastern Ontario.

The literature also indicates that the ‘bigger is better’ school reforms have severed the links between many rural schools and the needs of their communities (Theobald & Nachtigal, 1995). Moreover, Newton and Newton (1992) explain that since small rural schools are interwoven and interdependent with their communities, neither can develop without the other. Wallin (2008) argues that many small rural schools are the symbol of learning and community identity for many rural communities. As such, this reform rhetoric of creating larger, efficient, economically viable schools with better quality education conflicts with rural priorities and lifestyles. Therefore, educational officials and policymakers need to give increased attention to the local context if the potential advantages of small rural schools are to be realized (Newton & Newton, 1992).

In the United States, since the increase of rural education research of the later 20th century, small rural school reform dialogue has begun to include the notion of community identity as a factor when considering school closures and consolidations in rural communities. Similarly, in both Canada and the U.S., there is increasing evidence of the value and viability of small rural schools (Corbett & Mulcahy, 2006; Cotton, 1996; Jimerson, 2006). In addition to their educational benefits, small rural schools are viewed by rural inhabitants as the heart and symbol of learning and community identity within rural communities (Wallin, 2007). As such, a critical argument against school consolidation is the role of the school in sustaining the community both socially and economically. Therefore, the purpose of many of these recent studies is to both demonstrate that rural educators are working towards the creation of effective learning environments in rural schools and argue that the loss of small rural schools means the loss of rural communities (Bard et al., 2006; Wallin, 2007).

My findings suggest that small rural schools provide each and every student with unique opportunities for community involvement both in school and outside of school. For example, at the school where I teach, in the fall of 2009, each class walked to the community library to attend a presentation by the local librarian, who was also the mother of two of our students. On the way to the library, the students were able to wave at grandparents, aunts and uncles, and parents driving or walking by and point to their homes. This familiar, comfortable environment allowed students to become enthusiastic about reading (Thompson, 2010, p. 4). Later that season, the primary class walked to the local health centre to perform some songs and dances for the seniors' monthly luncheon. Their homeroom teacher introduced them by surname and the seniors responded in recognition of familiar surnames in the community. One particular song included a verse about "smiling at your neighbour," which is a value instilled in these students from a young age, in both the school and community settings (Thompson, 2010, p. 5). Every winter, the school organizes a community potluck and Christmas concert. For the past two years, I have directed the Christmas concert, composed of a cast of 15-25 students and a chorus, which includes the entire student body. As such, every student participates in this holiday event. At the potluck, each family brings one or two dishes, which are placed at the back of the gymnasium on a long table. Every person is able to sit down with family, friends and community members, enjoy a home cooked meal and watch the student performance. The small nature of the school population enables all families to convene in their local school community gymnasium for an evening of good food and good fun (Thompson, 2010, p. 13).

Rural education researchers such as Theobald and Nachtigal (1995) and Howley (1997) suggest that historically the industrialized and urbanized view of education of the 19th and 20th centuries ultimately led to the deterioration of the sense of community associated to small rural schools. By closing small rural schools and creating large, urban mega-schools, the small, family-like, community aspect of these rural schools was lost. In response to this situation, recent rural education research has capitalized on the strong sense of community that thrives within and around many existing small rural schools (Herzog & Pittman, 1995; Theobald & Nachtigal, 1995). Furthermore, certain researchers suggest the development of school and community relationships and the establishment of networks with various groups including school divisions, higher education institutions and the provincial government in order to contribute to effective learning environments (Bard et al., 2006; Wallin, 2007).

In their article entitled *Culture, Community, and the Promise of Rural Education*, Theobald and Nachtigal (1995) argue that a return to community-centered rural schools could be the antidote to the detrimental impact of industrialization and globalization on the sense of community associated with schools. The purpose of their research is to address the root causes of the current rural school circumstances as opposed to analyze the symptoms. They argue that successful educational renewal depends on historical and philosophical analyses. Upon an analysis of the history and philosophy surrounding American rural education, the researchers found that the link between industrial trends, such as specialization and centralization, and schooling practices was merely a decision made by people with power and an agenda. This industrial and now global pattern has depleted the sense of community associated with schooling. In their opinion, the common

project, common good, and common unity that used to promote a sense of mutual obligation, social responsibility and belonging in North American society has been lost. Thus, Theobald and Nachtigal (1995) advocate for a drastic change in society's public and private choices in order to allow for the production of sustainable, vibrant communities in the future.

At the school where I teach, the teachers are committed to delivering a curriculum that relates to students' 'real lives' and their community context. In 2008, for instance, the grade 7/8 teacher taught the students about the history of the Rideau Lakes. Each student was responsible to research one aspect in the history of their community and surrounding area. The students then taught one another through power point presentations, poster presentations etc. In the same year, the primary teacher introduced students to the differences between urban and rural life. The students were asked to draw upon their personal experiences within a rural community (Thompson, 2010, p. 2). These examples relate to the theory of situated cognition, in that complex relationships exist between the learners (students) and the settings where learning takes place (the community). Darwin (2006) explains that: "When teachers provide opportunities for students to apply their cognitive skills to a personal issue or problem, learning is enhanced and the students experience an affirming sense of accomplishment" (p. 398). Moreover, this situated type of learning is both about context, place and community of people, as well as the meaning-making occurring amongst its participants (Whitson, 1997).

The research clearly indicates the importance of community identity to the future of small rural schools (Howley, 1997; Theobald & Nachtigal, 1995; Wallin, 2007).

Moreover, the notion of community learning or learning in a community of practice has its foundations in situated cognition theory (Lave, 1997; Lemke, 1997; Whitson, 1997). My personal examples have highlighted the significance of the social and contextual nature of learning on students' education and well-being. Unfortunately, as my findings suggest, the major theme of 'The Future of Small Rural School Communities' seems to be overshadowed by the themes of declining enrolment and school size, efficiency and economics, and quality education and student achievement. These themes, which correlate to globalized ideals, drive most closure and consolidation initiatives. The following section provides alternate choices to closures and consolidations and recommendations for future actions.

Recommendations and Alternate Choices

In their research, although Newton and Newton (1992) list various disadvantages of small rural schools, including teacher isolation, lack of cultural diversity and limited program choice, they found that most students, teachers and parents viewed learning, teaching and school operations in small rural schools quite positively. Moreover, for every disadvantage, they list two to three advantages. Thus, new challenges create new opportunities for educational leadership for schooling in sparsely populated areas. There are choices and alternatives to closures and consolidations. Wallin (2007) adds to this line of thought by stating that in responding to these 'challenges,' many small rural schools become innovative out of necessity. Moreover, the high stakes situation that these schools find themselves in, due to the looming possibility of closure or consolidation, serves as a model for effective practice. Therefore, rural school districts have increased their capacity by thinking outside the box (Wallin, 2007). Wallin recommends one way to

capitalize on the creative and innovative nature of small rural schools is to work with other groups within and outside of the local community to share and streamline services in order to maintain programs and opportunities for students.

In my experience, developing strong partnerships between the local rural school and other agencies in and around the community, such as libraries, township councils and health centres, is beneficial to the viability of the school. Moreover, most small rural schools facing closure or consolidation have an active parent council, fighting for the plight of the small local school. Establishing open and honest relationships with these parents allows for sharing of ideas and strategies regarding the future of the school. Thus, I recommend strengthening ties with local community members and parents in order to validate the value and viability of these small rural schools.

Theobald and Nachtigal (1995) add to this notion of capitalizing on ‘smallness’ and ‘community’ by recommending a re-creation of communities. They argue that the contemporary rhetorical agenda for education tends to focus on meeting the ‘needs’ of students and in order to attend to the ‘needs’ of students, schools must contribute to the re-creation of communities. This initiative for community re-creation will require the redesign of schooling which will begin by refocusing the education agenda on the local context and community. They begin with the initiative to make the understanding of one’s place (sense of community) a chief curricular focus in schools, arguing that focusing on place will make learning more experiential and therefore more powerful and provide youths with an ability to understand who they are and how they might be in the world. In addition, developing a sense of place holds the promise of contributing to the development of meaningful identity, beyond a person’s ability to accumulate material

goods. In addition, Theobald and Nachtigal (1995) recommend that rural educators engage in school redesign, focusing on the creation of viable rural communities (refocusing the educational agenda on local community contexts). This school redesign relates to the following rural commitments as addressed by Howley (1997): senses of and attachment to rural places, the relationship between school and community sustainability, proper aims for an education committed to rural community, community engagement in rural schools, and curricula to sustain rural places.

This type of school redesign would require teachers to view ‘challenges,’ such as a declining school population and multi-grade classrooms as ‘assets’ to their school and classroom culture. This environment can foster peer teaching, personalizing the curriculum, differentiation and shared teaching. As such, I recommend that small rural school teachers embrace their unique situations and cultivate a contextual approach to learning.

Along the same lines as Theobald and Nachtigal and Howley, in their annual report, the People for Education (2008) explain that across North America, education communities are beginning to realize that schools are the ideal place to offer the programs, supports, services and education that families, children and youth need in their communities. As previously outlined, their report describes the effect that declining enrolment will have on schools across the province of Ontario over the coming years. Although their findings show overall improvements in many of the programs and resources in Ontario schools, they argue that our system is not prepared for declining enrolment and lacks a forward-thinking vision for education. Moreover, the many years

of discussion, reports and recommendations for Ontario schools has proven unbeneficial for integrating services in Ontario schools. Thus, the People for Education (2008) argue:

Without provincial policy and leadership to provide structure and support for community schools, to integrate schools into municipal planning, and to integrate services for children, youth and families across provincial Ministries, Ontario will not achieve what has been achieved in other provinces and jurisdictions – schools at the centre of communities, used and valued by the community at large (p. 3).

Therefore, as an alternative to closures and consolidations, the People for Education are suggesting that schools at the hub of communities be used and valued by community members. They draw upon successful reforms in other provinces. In Manitoba, for instance, the Manitoba government provides funding for community schools that “act as a hub for a broad range of services, supports and opportunities that strengthen and support schools, families and communities” (People for Education, 2008, p. 3). Similarly, in Saskatchewan, the province has implemented the SchoolsPlus program, which is based on the premise that schools have two functions: to educate children and youth, and to deliver services to families (People for Education, 2008).

Evidently, new solutions are needed and there are alternative choices to initiatives such as Boundary 2020. In both rural and urban areas, schools can act as viable and thriving hubs for their communities. They can include community centres that stay open after hours and on weekends for community use. Schools can house parenting centres, child care centres, sports events, community kitchens, public meeting spaces, public libraries and health clinics. These community uses add to the life of a school and strengthen a community’s sense of connection to their local school (People for Education, 2008). Moreover, with regards to the closure and consolidation rationale of efficiency and economics, these solutions offer efficient uses of the schools and do not necessarily

cost more money. Rather, in many cases, schools may save more money in the long run. Furthermore, these recommendations may involve municipalities and other ministries and sectors and would impose fundamental changes on the way schools are funded (People for Education, 2008).

As previously exemplified, declining enrolment in Ontario should not be seen as synonymous with school closures and consolidations. In various provinces, Ministries of Education are exploring other strategies to deal with declining enrolment (DEWG, 2008; People for Education, 2008). In Manitoba, in response to the ARC process, parental concerns were so strong and valued that the Manitoba government tabled a bill to put a moratorium on school closures. This proposed legislation meant that any school up for review would no longer be eligible for closure except under extreme circumstances. Thus, many schools facing declining enrolment were not eligible for closure or consolidation (DEWG, 2008). In Quebec, the Quebec English School Boards Association appointed an advisory council to investigate the issue of declining enrolment and limited resources. In congruence with the previously described community-based solutions, this council recommended that Quebec school boards re-position their schools as centres for community-based activity and complementary services. They argued that schools from both English and French systems share more of their services, programs and buildings, and that school systems should co-operate with municipalities to ensure the full and effective use of their buildings (People for Education, 2008).

With regards to the ‘economics’ argument, the People for Education recall that declining enrolment is *not* offset by changes in funding formulas. Over the past few years, Ontario has added grants to support small, remote schools, and school boards now

receive funding for principals, vice principals and administrative staff on a per-school as well as a per-pupil basis. The province also provides school boards with a “Declining Enrolment Grant – a temporary transition grant to allow boards to adjust their staffing and expenses as their enrolment declines” (People for Education, 2008, p. 7). However, despite these steep declines in average school enrolment, the province has not changed the number of students required to generate staff in the funding formula. Perhaps a re-evaluation of the students to staff ratio is necessary in order to alleviate the misperception that closures and consolidations are the one and only ‘solution’ to the ‘problem’ of declining enrolment.

The Declining Enrolment Working Group report of 2008 recommends ways in which Ontario’s education community can continue to improve student achievement while addressing the impact of declining enrolment. This working group argues that when school closures or consolidations are the only solutions considered, we risk losing sight of our primary goal – the continuous improvement of student achievement (DEWG, 2008). Thus, this group is referring to student achievement as a goal which is *not* synonymous with closures and consolidations. This argument contradicts Boundary 2020’s vision for a 90% graduation rate through school closure and consolidation.

The DEWG suggests that their consultations and research have shown that alternative options exist. Declining enrolment is an issue that must be faced, not by school boards currently affected by it, but by all partners in education, to ensure that Ontario schools continue to be viable, valuable centres of learning. Their recommendations focus on four strategic activities that they deem critical to improving the education system’s response to declining enrolment:

1. Enrolment-based planning: We recommend a comprehensive planning process that encourages sharing information and opening dialogues before the discussion turns to choices about the future of individual schools.
2. Dialogue and partnerships: We recommend measures to build community dialogue and to encourage wider use of effective partnerships with both education and community partners.
3. E-learning and alternative program delivery: We recommend ways to promote e-learning and other alternative means of delivering programs through the use of information technology. These approaches can form an important part of program delivery for all boards, but particularly those experiencing declining enrolment.
4. A more effective funding formula: We recommend changes to make the funding formula more effective in allocating support for boards experiencing declining enrolment and in providing incentives for boards to find a better balance between resources and expenditures (DEWG, 2008, p. 29).

The research indicates that various choices are available to rural schools facing challenges such as declining enrolment. Researchers have suggested cultivating the community aspect of these small rural schools in order to encourage dialogue and strengthen partnerships. Ontarian research groups, such as the People for Education and the Declining Enrolment Working group believe that future research should focus on funding formulas and enrolment based planning. These recommendations and alternate choices should be acknowledged and considered prior to decisions for closures and consolidations.

Summary

In this chapter, first, using the theme of ‘voices of all stakeholders’ I analyzed the diverse perspectives present in the Boundary 2020 debate. I have explained how the four major themes that emerged from my document analysis relate to my conceptual framework and the literature reviewed in Chapter 2. With reference to my findings and literature review, I provided recommendations for educational officials involved in reform decisions. In the following chapter, I discuss implications for future research, limitations to the study and make concluding remarks.

CHAPTER 6

CONCLUSION

This study has examined various conflicting perspectives surrounding small rural school closure and consolidation reform in Eastern Ontario. The aim was to understand the rationale behind these reform initiatives and explore local responses to these reforms. In order to do so, seven pertinent documents were analyzed using semiotic analysis, as it allowed for the uncovering of differing meanings and interpretations ('voices') of the reform situation. Intertwined in these meanings and interpretations were four major themes. The preceding chapter discussed these themes as they related to the literature reviewed in Chapter 2 and my conceptual framework. In this chapter, I offer implications for future research, limitations to this study and concluding remarks.

Implications for Future Research

The documents analyzed for this project indicate an evident clash in perspectives regarding small rural school reform. Regardless of this conflict, the Boundary 2020 reform is now a reality. In light of this one-sided reform, future research is necessary across Ontario in order to listen to and take into account the voices of *all* stakeholders involved prior to decision making. Researchers agree that these types of qualitative studies involving an exploration of the perspectives of rural stakeholders would develop a comprehensive view of small rural school experiences (Corbett & Mulcahy, 2006; Hicks, 1999; Newton & Newton, 1992).

The UCDSB officials have begun this process by surveying certain stakeholders in order to get a sense of the perspectives on this reform (Dawes, 2009). However, these

surveys seem to cater to the administrative side. Enhanced qualitative research, including interviews and focus groups with students, teachers and parents is necessary in order to listen to and value the various voices involved and obtain a clear sense of the impacts of this transition.

My journal and Lunman's (2008) article indicate that when most students are asked for their opinion on their future education, they will take this seriously and reflect on what is best for their learning. However, it is evident in the literature that the student voice is rarely considered in school closure and consolidation decisions. As such, qualitative research exploring students' opinions of the advantages and disadvantages of school closures and consolidations would be beneficial to the reform process.

My findings suggest that teachers find themselves in a difficult position with regards to their opinions on reform efforts. They usually have strong points of view regarding reforms, but may not be able to voice their concerns for fear of being ostracized by the school board (Thompson, 2010, pp. 18-19). However, as closures and consolidations affect both their positions and curriculum delivery, their perspectives are valid for the future of the education system. Thus, quantitative and qualitative research in the form of anonymous surveys would be beneficial to determine their stance on reform efforts.

As evidenced in other provinces, when parents join together to voice their opinions and concerns on reform efforts, the results are beneficial for small school communities. In Manitoba, parental concerns were so strong and valued that the government passed a bill to put a moratorium on school closures (DEWG, 2008). For the

most part, this particular group of stakeholders has the community and students well-being at heart. Future research that attends to parents' perspectives would be beneficial.

Despite the arguments against closures and consolidations (Carson, 2007; ETFO, 2007) and research indicating the various advantages of small rural schools (Corbett & Mulcahy, 2006; Jimerson, 2006; Newton & Newton, 1992), numerous small rural communities across Eastern Ontario have been affected by school closures and the consolidations of the Boundary 2020 reform. Although these reforms appear under the guise of efficiency, economics, quality education, student achievement and community identity, further research would benefit from an understanding of whether or not these reforms are truly beneficial to students and their communities in the long run. One parent and realtor, for instance, expressed the following concern regarding the lack of appropriate research: "The studies on the economic impact of school closures on communities have not gone far enough" (Burns as cited in Lunman, 2008, paragraph 6). Therefore, research attending to the aftermath of reforms such as Boundary 2020 is required in order to make recommendations for future reforms. Moreover, as my study was localized to one particular Eastern Ontario school board, it would be beneficial to examine the reform efforts throughout Ontario. In light of the phenomenon of declining enrolment throughout the province and the fact that it is a main argument for reform efforts, research should focus on the similarities of Ontarian reform efforts.

Lastly, most researchers in the field of rural education concur that rural education in general is a relatively uncultivated facet of education (DeYoung, 1987; Howley 1997; Wallin, 2007). Howley (1997) argues that rural places suffer more than other places from the lack of research in education and from the misguided effort to build up standardized,

universalized procedures for school improvement. Many current research efforts undermine improvement in rural education. This research ignores rural circumstances and does not offer anything to fortify the will of those who would see rural schools improve for the benefit of rural community (Howley, 1997). Therefore, in order for school board officials and policymakers to truly grasp unique rural situations, further research is necessary on the “ins and outs” of rural education. I am not saying that each rural school should be put into a cookie cutter mold, but they do share common challenges and we need research that attends to both these challenges and their advantages. Howley (1997) explains that past research lacks empirical data, a consensus about appropriate definitions of rural education and knowledge of the diversity of rural schools. Therefore, I agree with DeYoung's (1987) argument that future scholarship calls for data-based studies on rural schooling dynamics, coupled with literature on administrative issues and problems. Longitudinal studies would allow delving into the issues over time, and follow-up on the consequences and implications of such decision making.

Limitations

My intent was to examine the rationale for the small rural school closures and consolidations of Boundary 2020 and responses to this reform. Although the research allowed me to explore various perspectives surrounding Boundary 2020 in the form of written documents, my data could have been augmented had I been able to engage in qualitative interactive research, including interviewing rural stakeholders (teachers, students, parents and community members).

Furthermore, the Boundary 2020 rationale and responses to this reform cannot be generalized to all school closure and consolidation reform situations as each case has

differing contexts. The perspectives discussed, however, do reflect a set of common themes relevant to small rural school reform.

I am a teacher in the school that served as my research site. My journal depicted examples of routine small rural school experiences. These experiences were comparable to the literature reviewed in Chapter 2. Although I am not a member of this rural community, as a teacher I have an affinity for this school and its students. Thus, I shared many of the perspectives of the ‘pro saving small rural schools’ stakeholders and disagreed with many of the ‘pro Boundary 2020’ arguments. As such, my closeness to this situation, although deemed to be a significant advantage, could be considered as a source of bias despite efforts made to check the data collected against other sources for increased trustworthiness.

Concluding Remarks

Throughout this project, I have been guided by the following research questions:

- What is the intention and rationale of policymakers and educational officials involved in rural school closures and consolidations?
- What are the shared perspectives of rural students, parents and community members regarding school closures and consolidations and the value and viability of their small rural schools?
- What are the effects of small rural school closures and consolidations on local rural communities?

In an attempt to answer these questions, I analyzed seven documents pertaining to the Boundary 2020 closure and consolidation reform, through the conceptual lens of globalization and situated cognition. The data collected support the research findings that

tension exists between standardized, globalized agendas and rural commitments and identities (Howley, 1997; Wallin, 2007). The themes that emerged through my document analysis also relate to the research evidence that closure and consolidation initiatives are fueled by arguments for declining enrolment and school size, efficiency and economics, and quality education and student achievement (Bard et al., 2006; Mulcahy, 1993; Wallin, 2007). Whereas, stakeholders who believe in the value and viability of small rural schools tend to recognize the advantages of their small size and importance of cultivating their community identity (Corbett & Mulcahy, 2006; Jimerson, 2006; Theobald & Nachtigal, 1995)

From this study, it appears that the intent of policy makers and educational officials involved in rural school closures and consolidations is to *solve* the rural *problems* the main problem being declining enrolment, in an efficient, productive and economically viable manner. These factors have been adopted by educational officials as global ideals. With regards to Boundary 2020, school board officials argue that the decrease in the board's student population will hinder our capability to provide quality education to students (Boundary 2020, 2007). However, these officials do not elaborate on this connection between school size and quality education. On the other hand, governmental organizations, such as the Declining Enrolment Working Group, argue that school closures and consolidations as a *solution* to declining enrolment run the risk of losing sight of our main goal as educators, the continuous improvement of student achievement (DEWG, 2008).

In this study, it was found that most parents, community members, students and teachers share common perspectives regarding small rural school closures and

consolidations. These groups of people view their small rural schools not only as an essential component to a thriving community, but as vital learning centres for their children. Students of these schools feel safe and comfortable in these small family-like school cultures. Teachers appreciate the various teaching and learning styles that are fostered in a small school environment, including community-centred learning. This situated learning has its roots in the theory of situated cognition (Lave, 1997; Whitson, 1997). Parents recognize the role of the school as the hub of the community and the center for many community activities. With regards to reforms, such as Boundary 2020, these people join together to save their small rural schools.

The literature indicates that closures and consolidations have been detrimental to rural communities across North America (Bard et al., 2006; Howley, 1997). This study touches upon the effects of small rural school closures and consolidations on rural communities. Within the research context, the Boundary 2020 initiative seemed to recall old wounds of the devastation of surrounding communities caused by school closures in previous years (Lunman, 2008). Although this precedence served as an argument against Boundary 2020, 13 schools in 13 different communities are slated to close. The school board officials have begun to research the effects of this reform on administrative implications and student learning (Dawes, 2009). However, no documentation was uncovered regarding the effects of Boundary 2020 on these communities.

In Ontario, in the fall of 2007, Dalton McGuinty's Liberal Government election campaign promised \$550 million in funding to save rural schools (Lunman, 2008). One wonders what happened to this promise. Moreover, the fact that a facet of McGuinty's campaign referred to saving small rural schools, which implies he feels the need exists, is

evidence of the growing number of small rural schools at risk of closure and consolidation throughout Ontario. This study has served as a starting point for discussion on this topic. My hope is this: as cities and suburbs expand, and large mega schools are created, the *small rural school* will continue to *stand* tall in all its glory. In order to achieve this, innovative strategies have to be explored through negotiations of *all* groups of stakeholders to support small rural schools in the face of change.

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Investing in Public Education: Advancing the Goal of Continuous Improvement in Student Learning and Achievement



Report of the Education
Equality Task Force, 2002

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December 10, 2002

The Honourable Elizabeth Witmer
Minister of Education

Dear Minister,

I am pleased to present the report of the Education Equality Task Force, *Investing in Public Education: Advancing the Goal of Continuous Improvement in Student Learning and Achievement*.

Thank you for giving me an opportunity to serve the people of Ontario by conducting this review of the Province's education funding formula. Thank you also for your support and encouragement throughout the course of my work.

Sincerely,



Mordechai Rozanski

Dr. Mordechai Rozanski

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Contents

Preface	3
1. Task Force Mandate and Process	5
Mandate	5
Expert Advisers	5
Stakeholder Advisory Committee	6
Research and Consultation Process	6
2. Education Funding in Ontario	9
Background	9
Student-Focused Funding: The Current Formula	11
3. Context for Considering the Issues and Making Recommendations	14
Roles and Responsibilities in Ontario’s Education System	14
Guiding Principles for the Funding Formula	17
4. Issues and Recommendations	21
Introductory Comments	21
Benchmarks	23
Effectiveness of the Formula for Distributing Funds among Boards ...	25
Boards’ Flexibility with Respect to Local Expenditures	38
School Renewal (Pupil Accommodation)	40
Special Education	43
Student Transportation	48
Teachers’ Qualifications and Experience	50
Technology	51
Governance	53
5. List of Recommendations and Summary of Estimated Costs	54
List of Recommendations	54
Summary of Estimated Costs	59
Notes	60

Appendices	
A. Task Force Chair and Expert Advisers	63
B. Stakeholder Advisory Committee	64
C. Discussion Points to Frame the Research and Consultation Process . .	66
D. Components of the Student-Focused Funding Formula	69
E. Participants in Roundtable Discussions	74
F. Participants in Meetings with Provincial Stakeholder Associations . . .	81
G. Individuals and Organizations That Made Presentations and/or Provided Written Submissions	85
H. Approach Used to Estimate the Cost of Updating the Benchmarks . . .	95
I. Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant	97
J. Estimated Cost of Updating Benchmarks – by Benchmark	99
Select Bibliography	104

Preface

The government announced the Education Equality Task Force in its Speech from the Throne on May 9, 2002. I was appointed to review the province's student-focused funding formula and to make recommendations on ways to improve equity, fairness, certainty, and stability in the funding of Ontario's students and schools.

Since my appointment, I have considered this review an opportunity to affirm and strengthen Ontario's publicly supported education system by advancing its goal – continuous improvement in student learning and achievement. Since the funding formula is one of the instruments for advancing this goal, my report focuses on improving the formula so that it provides school boards and schools with the means to achieve our education objectives.

The journey from my appointment in May to the publication of this report has been a rewarding and enlightening one for me. More than anything, I have been impressed by the intense desire for high-quality public education among all education stakeholders in Ontario's widely varied communities.

I have not made this journey alone. My understanding of public education and its goals has been greatly enhanced by conversations with, and by reading the work of, several important education “thinkers” and “practitioners,” including internationally respected researchers and former ministers and deputy ministers of education. I received thoughtful advice on the issues in my mandate from a panel of expert advisers, all of whom have a broad level of expertise acquired through long careers in Ontario's education system, and from a Stakeholder Advisory Committee made up of representatives of Ontario's major education stakeholders. Chapter 1 and Appendices A and B provide more information on these advisers.

I also received hundreds of oral and written submissions on a wide range of education and education funding issues from individuals, school boards, and education and other organizations during roundtable discussions and in public consultations throughout the province.

Since students are, after all, the focus of Ontario's education funding formula and this report, I am grateful that I was able, while conducting public hearings around the province, to visit some of Ontario's schools and to meet students and their teachers and principals.

The views of all of these people were most helpful as I deliberated the issues and wrote my report.

This report could not have been produced without the dedicated assistance of a key group of support staff and consultants:

- The task force's highly efficient project co-ordinator, Norm Forma, quickly assembled a top-notch task force staff, engaged key consultants, arranged a wide-ranging consultation process in a very short period of time, responded quickly to all my needs, and kept me firmly on track.
- Enid Slack, an economic consultant with an impressive track record as a member of an Education Funding Review Panel in British Columbia and of David Crombie's Who Does What Panel for the Ontario government, provided sensitive and practical advice on a wide range of issues.
- Ken Snowdon, who most recently served as Vice-President, Policy and Analysis, at the Council of Ontario Universities and who has years of experience with funding formulas, cost analyses, and research into higher education issues, conducted important research and advised me on many of the issues.
- Pat Tolmie, who has edited many education task force reports, including several for the Education Improvement Commission, offered valuable editorial advice and guidance in the crafting of this report.

I want to thank the following staff of the Ministry of Education: Suzanne Herbert, Deputy Minister; Norbert Hartmann, Assistant Deputy Minister for Special Projects; Judith Wright, Assistant Deputy Minister, Strategic Planning and Programs; and Peter Gooch, Drew Nameth, Allan Doheny, and Wayne Burtnyk of the Elementary/Secondary Business and Finance Division.

Finally, I would like to thank the Honourable Elizabeth Witmer, Minister of Education, for her support and for encouraging me to offer candid advice on ways to improve Ontario's education funding formula.

Mordechai Rozanski

Guelph, Ontario

November 28, 2002

I. Task Force Mandate and Process

Mandate

As I noted in my “Preface,” the Education Equality Task Force was announced in the Speech from the Throne on May 9, 2002. The government appointed me to review the province’s education funding formula and to make recommendations, to be considered for the 2003–04 school year, on ways to improve equity, fairness, certainty, and stability in the funding of Ontario’s students and schools.

I was asked to review six aspects of the funding formula:

1. the effectiveness of the model for distributing funding between different types of boards (for example, between urban and rural boards, between small and large boards)
2. the structure of cost benchmarks (for example, does per pupil funding reflect appropriate per pupil costs?)
3. the degree of local expenditure flexibility school boards should have
4. approaches to addressing school renewal (for example, maintenance, repairs, renovations)
5. whether the current approach to funding special education is the most responsive way to meet students’ needs
6. the approach to funding student transportation, including ways to maximize opportunities for shared busing services between school boards that serve the same communities

In addition, I was asked to ensure that my recommendations:

- promote the principles on which the funding mechanism was built, which include fairness, equity, responsiveness to learners’ needs, and accountability
- improve the stability of the education system
- respect the legislative and constitutional framework for education in Ontario, which includes public, Catholic, French-language, and English-language school boards
- take into account the fiscal situation of the Province

Expert Advisers

I was assisted in my work by a five-member team of independent expert advisers: Ann Vanstone, Patrick Slack, Lynn Beyak, Brian Cain, and Mariette Carrier-Fraser. Their biographies appear in Appendix A, as does mine.

Each of these experts possesses broad experience acquired during a career of service in Ontario's education system. Together they have served as a key resource, working directly with me as I met with stakeholders and the public, reviewed research and submissions, and developed my recommendations.

All of the advisers are independent volunteers not currently employed in the education sector.

Stakeholder Advisory Committee

I was also assisted by a 31-member Stakeholder Advisory Committee. This committee was composed of representatives from major education-related organizations, including those representing parents, students, teachers, principals, trustees, directors of education, and school board supervisory officials. Their names and affiliations can be found in Appendix B.

The role of the Stakeholder Advisory Committee differed from that of the expert advisers. While the expert advisers were acting in an independent capacity, each member of the Stakeholder Advisory Committee brought the perspective of his or her group to the consultation process. The Stakeholder Advisory Committee provided the current perspectives of members of the education community, helped the task force focus on key issues in its discussion paper (see below), and provided advice on the structure of the consultations. In addition, each committee member's organization made a presentation or submitted a brief on the issues under consideration.

Research and Consultation Process

I began my research and consultation process in late May 2002 with a detailed review of Ontario's education funding formula and past studies and reports related to the formula. These activities continued through the spring and summer.

To encourage a wide range of input from the education community and members of the public, in July 2002 my staff established a website where I posted information about my mandate, objectives, and activities. I also encouraged people to use the website, or the mail, to send me their opinions on the issues in my mandate.

In the summer of 2002, with the assistance of my expert advisers and the members of the Stakeholder Advisory Committee, I developed a discussion paper and posted it on the task force website. The paper, which was designed to frame the research and consultation process, posed questions about the role of the funding formula in advancing five principles: the quality of student learning and achievement, equity and fairness, responsiveness to local needs, accountability, and affordability. While the paper focused on these five principles, I encouraged readers to consider *all* aspects of the formula open to discussion. (Appendix C contains an excerpt from the discussion paper, covering the main points.)

My research covered a wide range of issues, focusing on education funding but also looking at studies on education itself, education systems, and the effect of various influences on children's ability to learn and to succeed in school. I wanted my recommendations to be based not only on what I heard during my consultations, but also on empirical studies and evidence-based research.

My staff and I reviewed education funding concepts and systems across Canada and in the United States, the United Kingdom, and New Zealand to see how they handled the various issues involved. I also benefited greatly from the research services of the Ministry of Education's Strategic Planning and Elementary/Secondary Programs Division and the data gathering and modelling capabilities of the ministry's Elementary/Secondary Business and Finance Division. Staff of these divisions responded to my questions and provided data promptly and thoroughly.

I consulted some of the most eminent thinkers in education in Canada:

- Dave Cooke, former Minister of Education and Training in Ontario; former Co-Chair of the Education Improvement Commission and the Task Force on Effective Schools
- Dr. Michael Fullan, Dean of the Ontario Institute for Studies in Education/University of Toronto; researcher, consultant, and policy adviser to education organizations and government agencies in Canada, Britain, and elsewhere
- Veronica Lacey, President and Chief Executive Officer of The Learning Partnership; former Deputy Minister of Education and Training in Ontario; former Director of Education and Secretary-Treasurer of the North York Board of Education
- Dr. Dan Lang, Professor, Higher Education Management and Finance, Department of Theory and Policy Studies, Ontario Institute for Studies in Education/University of Toronto
- Dr. Fraser Mustard, Founding President and Fellow, The Canadian Institute for Advanced Research; a leading researcher in the socio-economic determinants of human development and health, with a particular emphasis on early childhood
- Dr. Charles E. Pascal, Executive Director of the Atkinson Foundation; former Deputy Minister of Education and Training and of Community and Social Services, both in Ontario
- Dr. Charles Ungerleider, Professor, Sociology of Education, Department of Educational Studies, University of British Columbia; former Deputy Minister of Education in British Columbia

I also read both published work and pre-publication manuscripts by these people, as well as the writings of other highly respected researchers in the fields of education such as Michael Barber, Richard Elmore, and Peter Hill. (See also the "Select Bibliography" at the end of this report.)

My public consultation process, which was extensive, was designed to be as inclusive as possible. In August 2002, I held a series of 12 roundtable discussions with 179 invited participants. The participants, who had been recommended to me by members of the Stakeholders Advisory Committee and others, were grouped as follows: parents, students, trustees, administrators, principals, teachers, taxpayers, francophone educators and community members, people from both urban and rural boards, school board support staff, and special education staff. My expert advisers and I spent one day with each group.

In September 2002, I hosted 10 days of public meetings in the following cities: Ottawa, Thunder Bay, Toronto, North Bay, London, and Barrie. These hearings were advertised extensively in the media. They were scheduled from 9 a.m. to 9 p.m. to accommodate as many participants as possible, particularly those working during the day. A total of 575 people, representing organizations or appearing as individuals, made presentations at these hearings.

To improve my understanding of Ontario's schools, I took advantage of the public meetings to visit schools in each of the cities where hearings took place. I visited English- and French-language, public and Catholic, and elementary and secondary schools.

In early October 2002, I held a series of brief but informative meetings with representatives of the major education stakeholder groups in the province and the Chiefs of Ontario. I also met, at their request, with members of the caucuses of the Progressive Conservative Party, the Liberal Party, and the New Democratic Party.

In all, I met with or heard presentations from more than 900 people and the task force received 882 formal submissions. All of these submissions were reviewed and given careful consideration as I formulated my recommendations.

2. Education Funding in Ontario

Background

The present system of funding elementary and secondary education in Ontario was introduced in 1998, as part of a series of reforms the government began making to Ontario's education system in 1995. Among the changes were the following:

- the introduction of province-wide assessments of student achievement, conducted by the Education Quality and Accountability Office
- the establishment of the College of Teachers
- the introduction of a new elementary and secondary curriculum
- a plan for the gradual phasing out of the Ontario Academic Credit (Grade 13), to be completed in 2003
- a new school board governance structure
- the introduction of mandatory school councils

The new school board structure involved a significant amalgamation of English-language school boards and the establishment of French-language school boards across the province. There are now 72 district school boards in Ontario: 31 English-language public boards, 29 English-language Catholic boards, 4 French-language public boards, and 8 French-language Catholic boards. One of the stated goals of the new structure was the reduction of the administrative costs associated with school board operations.

The new education funding formula replaced a complex system of financing education that had involved a combination of government grants and revenue raised by school boards from their local property tax bases. Before 1998, school boards would set local education property tax rates, and municipalities would collect the taxes on boards' behalf. This system was considered inequitable, since boards with large property tax bases were able to raise more money than boards with access to small tax bases. Boards no longer have the authority to determine education tax rates.

Under the present system, the government sets a uniform rate, based on a current-value assessment system, for the education portion of property taxes for all residential properties in the province. It sets a rate that varies by municipality for the education portion of business property taxes. Municipalities collect the education portion of property taxes for the school boards in their communities. The Ministry of Education, using the student-focused funding formula, determines each board's overall allocation. Property tax revenues are considered to form part of the allocation, and the Province provides additional funding up to the level set by the funding formula.¹

As I discuss later in this report, the vast majority of those I heard from oppose a restoration of boards' authority to levy taxes. I oppose such a restoration as well, on the grounds of equity.

The new funding formula also streamlined the grants system, reducing the number of grants in the formula by about two thirds.

Called "student-focused funding," the new method of financing elementary and secondary education was intended to accomplish the following:²

- provide a fair and equitable level of funding for all students, wherever they live in Ontario
- provide more funding for students in the classroom and less for administration and other non-classroom costs
- provide funding to maintain existing schools and to build new schools where they are needed
- protect funding for special education
- increase the accountability of school boards by ensuring that boards report consistently on how they spend their funding allocations

The government considers student-focused funding to be a fair approach because it uses the same set of rules to allocate funds to all boards and because it recognizes that different boards have different needs and responds to these differences.

Student-focused funding allows school boards a certain amount of flexibility in how they use their allocation to meet local priorities. Only four limits have been set on this flexibility, as follows:

- Funding intended for education in the "classroom" (that is, for the components of a classroom education set out in the Foundation Grant, which is discussed below) must be used in the classroom. It cannot be used, for example, to meet administrative costs.
- Funding intended for special education must be used only for special education.
- Funding intended for new schools or additions and for major repairs to schools must be used only for those purposes.
- Boards must not spend more on administration and governance costs than is provided for in their allocations.

Since the introduction of student-focused funding, the government has made several changes to the formula and added some new money to it.³

Although there is general support for the concept and the structure of the student-focused funding formula (I encountered this support during my consultations), school boards and other members of the education community have continued to express concern about whether the funding formula is meeting the government's stated objectives for it. In response to these concerns, the government established this task force.

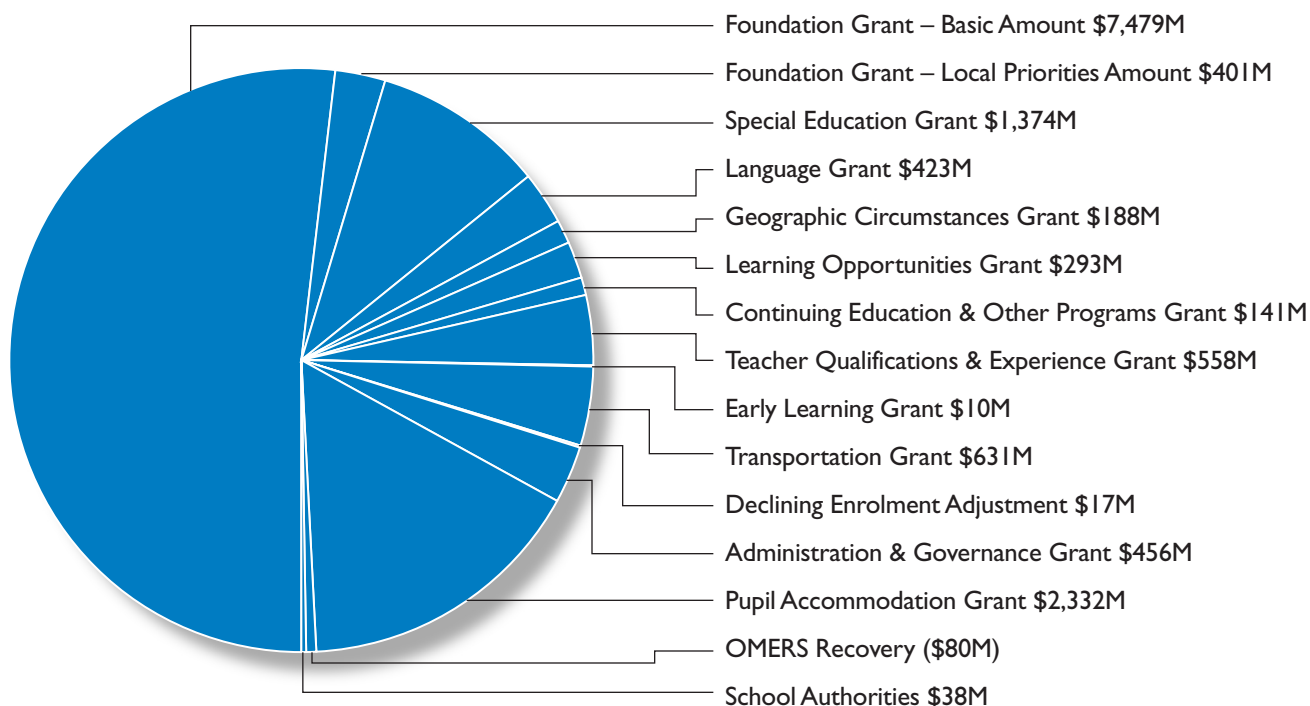
Student-Focused Funding: The Current Formula⁴

Overview of the Funding Formula

The student-focused funding formula consists of a Foundation Grant, a series of 10 Special Purpose Grants, and a Pupil Accommodation Grant. For 2002–03, grants to all school boards are projected to total \$14.26 billion. This figure includes the Ministry of Education’s original projection of \$14.215 billion and \$45 million added by the ministry in-year. The breakdown of current-year funding among grants is depicted below.

Student-Focused Funding Formula, 2002–03

Total allocation: \$14.26 billion



Source: Appendix I, Table I.1.

The Foundation Grant is intended to cover the components of a classroom education that are required by, and common to, all students. It allocates the same amount per student to all school boards. The Foundation Grant consists of the following major components:

- Basic Amount
- Local Priorities Amount

While boards have the flexibility to determine how they wish to spend the Local Priorities Amount, one of the specific aspects of the funding formula that I was asked to review is the degree of overall expenditure flexibility school boards should have.

The Special Purpose Grants provide school boards with funding to meet additional student needs not covered by the Foundation Grant, which may vary from one student to another, and additional board costs, which may vary from one board to another. The Special Purpose Grants are as follows:

- Special Education Grant
- Language Grant
- Geographic Circumstances Grant
- Learning Opportunities Grant
- Continuing Education and Other Programs Grant
- Teacher Qualifications and Experience Grant
- Early Learning Grant
- Transportation Grant
- Declining Enrolment Adjustment
- Administration and Governance Grant

I was specifically asked to inquire into two areas of the funding formula covered by Special Purpose Grants: the current approach to funding special education and the approach to funding student transportation. I note that the funding mechanisms behind the Intensive Support Amount portion of the Special Education Grant and the Transportation Grant are both also under review by the Ministry of Education.

The Pupil Accommodation Grant is intended to help school boards meet the costs of operating and maintaining their schools and, where warranted, provide new classroom accommodation. The grant has four main components:

- School Operations
- School Renewal
- New Pupil Places
- Prior Capital Commitments

Another specific area that I was asked to review is the funding formula's approach to addressing school renewal (for example, repairs and renovations).

Each of the above grants and their components are described in detail in Appendix D.

The Ministry of Education has established cost "benchmarks" for components of the grants. Benchmarks have two parts, and in this report I refer to them as follows: *benchmark factors* (those items or activities that trigger costs) and *benchmark costs* (the dollar amount assigned to each factor). An example of a *benchmark factor* is 2.75 principals per 1,000 elementary students (which works out to one principal for 364 elementary students); the associated *benchmark cost* for this factor is the salary-and-benefits cost of one principal. Benchmark factors take into account legislated standards, such as the maximum average number of students in a classroom. Benchmark costs are intended to represent

a standard or average cost for a particular factor. Benchmarks form part of the formulas the ministry uses to calculate grants, and they therefore affect the amount of funding each board receives.

As part of my mandate, I was specifically asked to examine the structure and appropriateness of the benchmarks.

3. Context for Considering the Issues and Making Recommendations

Since my appointment, I have considered this review an opportunity to affirm and strengthen Ontario's publicly supported education system. As the title of this report implies, I view the funding formula as an instrument for advancing the education goal of continuous improvement in student learning and achievement. It provides a context and acts as a prerequisite for achieving this goal.

This report does not attempt to reform the education system; it aims at improving the funding formula – getting it right so that we in Ontario can continue to reform our education system, setting ever higher standards and reaching ever higher levels of achievement. Education reform is still in its early stages in Ontario. At the very least, I hope that my recommendations will provide a funding basis for moving the reform process forward.

When considering Ontario's education system, the funding formula, and my recommendations, I took the following points as “givens”:

- Education advances the well-being of individuals in society and of society as a whole. It expands the opportunities available to individuals, enables people to fulfil their potential, underlies economic success, and enhances social cohesion. For those reasons, in democratic societies universal access to education is a common value and public education is seen as a fundamental responsibility of the state.
- For reasons related to the Canadian Constitution, Ontario has four publicly funded education systems: English-language public, English-language Roman Catholic, French-language public, and French-language Roman Catholic.
- Adequate funding of public education is a high societal priority. However, the amount of funding the public is called on to invest in education cannot be considered limitless.
- The goal of Ontario's publicly funded education system, as evidenced by the expectations set out in the Ontario Curriculum and the process established for the province-wide assessment of students, is the continuous improvement of student learning and achievement.
- The education funding formula is a tool for advancing these goals.

Roles and Responsibilities in Ontario's Education System

One of the first things that a review of the funding formula must take into account is the roles and responsibilities of the various “players” in this system. Based on my examination of these roles and responsibilities and what I learned during my research and consultation process, I developed the following view of the changing structure of, and relationships in, Ontario's education system.

(This view implicitly relates to governance issues, which deserve further study and elaboration. I discuss governance later in this report.)

Many of the points mentioned below are not new. I am particularly indebted to the work in recent years of the Education Improvement Commission and the Task Force on Effective Schools, as well as the writings and thoughts of Michael Barber, Michael Fullan, Charles Ungerleider, and others working in the field of education research.⁵

The Province

- The Province is responsible for providing its citizens with access to a high quality of public education.
- Through the Ministry of Education, the Province establishes the goals, policies, standards, and performance expectations of Ontario's education system.
- Through the Ministry of Education, the Province establishes the structures and the funding to support its education goals, policies, standards, and expectations.
- The Province holds those who deliver education programs and services accountable for spending education funding effectively to meet the system's goals, policies, standards, and expectations.
- The Province is responsible to the people of Ontario for ensuring that the goals, policies, standards, and expectations it sets are appropriately high, and that the structures and funding it provides for education are appropriate and adequate for meeting those goals, policies, standards, and expectations.

These roles and responsibilities have certain implications for the funding formula. The Province is a policymaker and, therefore, in my view it cannot be, and should not try to be, a micromanager. It should not prescribe all details of programs, services, and administration but should devolve and delegate implementation functions to school boards and school leaders. At the same time, as a policymaker and as the provider of funds, the Province has the right and obligation to demand both fiscal and performance accountability from those who spend the funds provided for public education.

School Boards (Elected Trustees)

- Boards, in consultation with their administrators and their school communities (principals, teachers, support staff, and school councils), set local policies, priorities, and budgets within the framework of provincial legislation and policy.
- Boards establish their local budgets within the scope provided by their funding allocation. They are responsible for ensuring that their schools and staff have the professional capacity and the appropriate resources to meet provincial and board policies and priorities. They are equally responsible for spending the public funds they receive from the Province in a cost-effective and appropriate way.

- Boards hold their directors of education and, through their directors, their superintendents, principals, teachers, and support staff accountable for meeting provincial and board policies and for ensuring that the board's funding allocation is spent in keeping with the board's budget.
- Boards are accountable to their communities (their electors) and to the Province for continuous improvement in the level of student achievement in their schools.

One implication of the boards' roles and responsibilities is that the funding formula must be flexible enough to allow the boards to meet local needs and priorities. Another is that boards should be required to justify their policies, priorities, and budget and publicly account for their spending and for the level of student achievement in their schools in clear and transparent ways – that is, in ways that the Province and their constituencies, particularly their school councils and parents, can understand.

The School

- The central role of the school is to advance the goal of continuous improvement in student learning and achievement. At the very least, schools are responsible for the following:
 - developing annual plans to improve student learning and achievement
 - teaching students
 - assessing and reporting on the progress of students, and demonstrating continuous improvement in the level of student achievement
 - working with their boards to attract and retain the best teachers
 - enhancing the motivation and professional skills of teachers
 - working with their school councils to engage parents and community members as partners in planning for continuous improvement and in school life in general
 - providing students with an environment that nurtures the values of the school community
- Schools often also play the following roles:
 - a delivery centre for programs and services that complement education programs and services (for example, school readiness programs, health and social services for children and youth)
 - a community hub – a gathering place for community groups and a centre for community activities
- The school principal is the educational leader, directly responsible for setting school policy and, most important, for continuously improving the quality of teaching and the level of learning and achievement in the school.
- Teachers, under the authority, leadership, and guidance of the principal, are partners in setting and implementing goals and are responsible for the instruction and assessment of students.

The roles and responsibilities of the school are fundamental and profound. In my view, education, while centred in the classroom, is influenced by what occurs in the whole school. Schools and the principals, teachers, and support staff who are at the core of our education system must receive sufficient

resources, including the resources needed to build capacity through professional development, to do their job. At the same time, they have an obligation to spend all resources in a cost-effective and appropriate manner and to demonstrate that their expenditures are leading to continuous improvement in student learning and achievement.

The school-community partnership is extremely important. School councils are a vital link between the school and the parents and community it serves. As I noted above, schools must work with their school councils to engage parents and other community members in planning improvement. Research studies repeatedly show that children whose parents are involved in their education do better at school. In addition to helping plan improvement, parents and community members can participate in the school in many helpful ways – as volunteers, by attending parent/community meetings, and simply by staying informed about their children’s school life.

The school-community partnership is evident in other ways. Many community services can be delivered through the school – preparing young children and their parents for school, providing literacy and language instruction, providing day care services, acting as a delivery centre for cultural events. As well, when community groups, parents, and others visit the school to participate in community activities and use the school’s facilities, they develop a sense of interest and ownership in local education. More public interest in and ownership of educational issues can only strengthen our education system.

The Ministry of Education and the education funding formula have roles to play in facilitating a strong school-community relationship. However, other provincial ministries, other levels of government (federal and municipal), and community agencies should also participate and make reasonable and appropriate contributions related to their areas of responsibility. They should work together with the Ministry of Education to co-ordinate the delivery through the school of educational and non-educational programs and services and also the funding of these activities. These activities and the funding for them should not all be the primary responsibility of the Ministry of Education. (I discuss the integration of these services in more detail later in this report.)

Guiding Principles for the Funding Formula

As I noted earlier in this report, during my consultation process I provided participants with a discussion paper that raised questions about the effectiveness of the funding formula in advancing five principles: the quality of student learning and achievement, equity and fairness, responsiveness to local needs, accountability, and affordability. These principles guided the consultation and research process I undertook. By the end of the process, however, I had refined my understanding of the goals and structure of Ontario’s education system, based on everything I had heard and read. As a result, I also refined and expanded my list of principles.

I believe that the process for funding public education in Ontario should be guided by the following interrelated and interdependent principles:

- adequacy
- affordability
- equity
- stability
- flexibility
- accountability

Adequacy. The goals of high program quality, high levels of student achievement, and continuous improvement in both will not be met, in my opinion, without a concomitantly high level of public investment.⁶ The reforms enacted in Ontario's education system over the past five years present a challenge to everyone involved in the system. From what I heard, this challenge is welcomed by most members of the public and the education community. But a strong challenge requires strong support. If the system is truly to improve, it must have the capacity to change. While financial support is not the only kind of support needed, it is important that it be adequate to the objectives school boards, teachers, and students are being asked to achieve.

Adequacy is inextricably linked to both affordability and accountability.

Affordability. The obverse of adequacy in public funding is affordability. I tend to agree with those who say we cannot afford not to provide adequate funding to meet our goals for public education. Our children deserve no less; our economic future requires no less. But education is only one public priority, and taxpayers' pockets are not bottomless. Parents and everyone in the education system must appreciate the connection between spending on public priorities and the fiscal resources available to the Province.

At the same time, taxpayers are entitled to demand the optimum benefit⁷ from any given public expenditure. If public funding for education is not spent wisely, if it is not accounted for transparently, and if its spending does not move us towards our goal of continuous improvement, the public will not be willing to provide it.

Both adequacy and affordability require that the Province and the education community engage in a continuous dialogue and a continuous process of assessing need, determining the appropriate level of funding to meet that need, then assessing results, including levels of student achievement, and reassessing need and the appropriate level of funding. To enhance affordability, the education funding system should actively encourage cost-effectiveness. The continuous process just described should include regular reviews to ensure that the processes and expenditures once thought to be cost-effective are still the most effective way of achieving the maximum benefit.

Equity. Equity means fairness. All Ontario students deserve equitable access to education and to the financial resources necessary for a high-quality education. Equity is not equality. Equality is not always equitable. One size does not fit all. Some children, because of socio-economic or geographic circumstances, language issues, and a host of other factors, start school at a disadvantage. Fairness demands that they receive extra support so that they quickly become ready to learn. The structure of the present funding formula recognizes this principle by providing Special Purpose Grants, which are open to all but which are not allocated to all.

Equity may mean, for example, helping children who are not skilled in the language of instruction to master it so that they are not left behind; providing socially disadvantaged children with the interventions they need to become ready to learn; providing children who live in rural or remote areas and children with special needs with the transportation and other services that they need to attend school and school events; and recognizing that French-language boards face higher costs than English-language boards in many aspects of the provision of education programs and services.

The funding system should support every reasonable effort to remove or, if removal is not possible, to mitigate conditions that impede a student's reasonable chance of success in school. It should support every reasonable effort to reduce the gap between low and high achievers without lowering standards or the expectations for student achievement. At the same time, the eligibility criteria for additional support must be transparently clear. Finally, as I noted earlier, it is unfair to require the Ministry of Education alone to provide all the funding necessary for all the additional supports. Many issues related to a child's ability to learn and to succeed in school need to be addressed before the child starts school. Other ministries, other levels of government, and community agencies must share the responsibility for ensuring that students have an equitable opportunity to succeed in school, although, as also suggested earlier, these services could be delivered through the school.

As my examples two paragraphs above imply, equity issues apply to school boards as well as individual students. I discuss this aspect of equity in more detail below, under the related principle of flexibility.

Stability. To plan for continuous improvement, boards and schools need to be able to count on a stable and predictable education funding system. Stability and its absence both have implications for the morale, and therefore the commitment to excellence, of administrators, teachers, and support staff. When boards and schools are issued a new or an expanded mandate, they need assurances that they will also be given time to build the capacity to implement the change and resources that are adequate to meet the new demands.

To ensure that improvements are sustainable, boards and schools need a measure of predictability in funding. Both the Province and school boards would benefit from multi-year planning of education funding. A multi-year model would

provide an element of predictability and time to plan ahead for both partners, with the caveat, of course, that the Province's economic situation could change and that the multi-year process would have to be fluid and dynamic enough to recognize and adapt the model to such a change.

Flexibility. This principle is related to equity. Ontario is a vast and diverse province, and the needs of students in one board's jurisdiction are not necessarily the needs of those in another board. The funding system should be both flexible and adaptable to allow boards and their schools a certain amount of discretion in assessing their local needs and spending part of their funding allocation to address those local needs. It should also encourage and celebrate the development of innovative, cost-effective programs and strategies.

Flexibility in accommodating local needs cannot exist without transparent accountability, which I discuss below.

Accountability. The principle of accountability, as it is generally understood, requires those who spend public money to accept the responsibility to spend it wisely and for the purpose intended, to report to the public in a transparent way on how the funds were spent and the results achieved, and to accept responsibility for those results.

As I have implied earlier in this chapter, I intend to extend the concept of accountability, borrowing from the education researcher Richard Elmore, who uses the term "reciprocal accountability."⁸ 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. As I mentioned above in the section on affordability, the process for determining appropriate resources should involve continuous review and continuous dialogue between the Province and representatives of all levels of the education community.

Reciprocal accountability must be transparent. For the funding formula to earn the confidence and support of the public, people must be able to understand how it works, how the money has been spent, and what has been achieved. Finally, reciprocal accountability requires a climate of mutual trust and respect, an eagerness to initiate and accommodate change, and a willingness to do the work and provide the resources to sustain it.

4. Issues and Recommendations

Introductory Comments

My recommendations, which are set out in this chapter and listed as a group in Chapter 5, are based on my view of the roles and responsibilities of the partners in the education sector and the guiding principles outlined in Chapter 3, as well as on my research and consultation process. I believe that my recommendations respond directly to the mandate I was given – they are aimed at improving equity, fairness, certainty, and stability in the funding of public education in Ontario. Most important, I believe that, if implemented, they will help advance the goal of continuous improvement in student learning and achievement.

Many of those who participated in my consultations, particularly those who attended the roundtable discussions and my meetings with representatives of stakeholder associations, expressed the view that the student-focused funding formula is sound as a concept, if not fully realized in practice, and that it is definitely more reasonable and equitable than the grants-and-property-tax-based system it replaced. I heard general support for the goals of the three main components of the formula's structure:

- the Foundation Grant, which is intended to fund education needs common to all Ontario students
- the Special Purpose Grants, which recognize that particular students and particular districts may have distinct, additional funding needs that are not common to all students and districts
- the Pupil Accommodation Grant, which is intended to fund student accommodation needs

In my research, I found that this type of formula, where a basic grant that provides a common level of service is combined with specific grants that address particular student needs and district costs, is used in several other jurisdictions, including British Columbia and Alberta.

At the same time, almost everyone I heard from said that the amount of funding allocated to education in Ontario is inadequate. That is, for virtually all school board and school stakeholders, *adequacy* of funding is the issue, more than the structure of the formula itself, although stakeholders did express concern about the structure as well. I address these concerns throughout this chapter.

Many presenters also expressed concern about the absence of both an annual process for reviewing and updating the formula to reflect increased costs and a regular, more comprehensive process for reviewing the formula to evaluate how well it is working and whether it continues to meet the Province's objectives for it.

I often asked those who raised the issue of adequacy, “How much is enough?” No one suggested that the amount should be limitless. Many maintained, however, that we cannot afford *not* to make an adequate investment in education. To my mind, the word “investment” is key. The answer is not to just throw money at education; it’s to make strategic investments in the goal of continuous improvement.

I agree that the disparity between the benchmark costs in the funding formula, which for the most part are based on 1997 board costs, and the actual costs facing boards today is a problem. I believe that, within the limits of the Province’s fiscal resources, the education allocation must keep up with both enrolment changes and recognized cost pressures. My recommendations, therefore, focus to a large extent on ensuring that funding is maintained at a level that will allow boards to meet the Province’s education objectives and on conducting regular reviews to update the benchmark costs in the formula. I also recommend several new investments, address issues related to some aspects of the formula’s structure, and recommend modifications to some specific grant components.

I am most appreciative of all of the comments and advice I received from stakeholders and community members associated with school boards throughout the province – urban, rural, and northern; large and small, public and Catholic, English- and French-language. I have not, however, been able to make a recommendation on every issue or concern presented to me during the consultations, as worthy of attention as they are. Some are simply beyond the scope of my mandate. Others did not directly relate to funding issues. Still others, when I examined them more closely, appear to be at their core issues that could be managed locally if adequate funding were available. I believe that my recommendations concerning adequacy of funding and new investments, if implemented, will resolve many of these issues.

I emphasize, however, that all of the comments and advice I received have helped inform my recommendations.

Unless otherwise noted, my recommendations are for measures that, if implemented, would begin to take effect in the 2003–04 school year as part of a multi-year funding plan. By “multi-year funding plan,” I mean over three years. The government may wish to fully implement some measures earlier.

However, I am making three recommendations that apply to the current school year, 2002–03. These three recommendations are for:

- an allocation of funds for boards’ current round of collective bargaining with their teaching and support staff
- funding under the Special Education Grant for approved Intensive Support Amount (ISA) claims that boards submitted to the Ministry of Education through to the end of the third cycle of the ministry’s review of ISA funding
- funding for the immediate cost pressures boards face related to student transportation

These three recommendations reflect the priorities that I discerned through my consultations and subsequent analysis of the issues. I believe that if these recommendations are implemented in the 2002–03 school year they will foster stability in the education sector.

Benchmarks

School board trustees and administrators told me that inadequate funding has compromised their ability to allocate appropriate funding to important programs and services. They said that, to honour the contracts they have negotiated with their teachers and support staff, they have had to reduce their allocations to other areas such as school operations, professional and para-professional services, and school libraries. I was told that, with a few exceptions, the benchmark factors and costs in the funding formula have not been updated since the formula went into effect in 1998 and that, where updates and investments in new initiatives have occurred, they have not matched actual cost increases. Presenters maintained that the benchmarks need to be updated to reflect actual costs. They also suggested that a multi-year approach to funding education would provide them with relative stability and an element of predictability in planning. I note that a multi-year approach would also provide the Province with an element of predictability in its own planning.

With one exception, every grant in the formula is calculated in part on the basis of benchmark costs.⁹ Benchmark costs affect the amount of funding boards receive to cover their costs in the areas of salaries and benefits for administrators, teachers, and support staff; learning resources such as textbooks, classroom supplies, computers, and related administrative costs; school operations, including heating, lighting, maintenance, cleaning, and insurance; and construction, including renovations and major repairs (“school renewal”) and additions or new buildings (“new pupil places”).

I recommend that:

1. the Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant) to reflect costs through August 2003, and that funding that reflects these updated benchmark costs be phased in over three years, starting in 2003–04, as part of a multi-year funding plan

I estimate that the updated benchmark costs covering costs through August 2003 will total \$1.08 billion, excluding the additional cost of updating salaries and benefits in 2002–03 (see recommendation 2). The \$1.08 billion estimate comprises updates of benchmark costs to August 2002 (\$1.01 billion) plus updates of non-salary-and-benefit costs to 2003 (\$70 million). The estimated \$1.08 billion should be phased in over three years, starting in 2003–04, as part of a multi-year funding plan.

Appendix H outlines the approach I used in estimating the cost of updating the benchmarks. It notes that the base year for my updates is 1998, the year the current funding formula came into effect, with three exceptions where the Ministry of Education has added funding since 1998 and prior to 2002–03. See Appendix H for more details. Appendix I contains a table (Table I.1) that shows the estimated cost of updates by grant and grant component. Appendix J contains four tables.

Table J.1 and J.2 show the estimated cost of updates by individual benchmark (Table J.1 is a summary; Table J.2 offers more detail). Tables J.3 and J.4 respectively provide detailed calculations for the update to the Transportation Grant and the update to the School Operations Allocation of the Pupil Accommodation Grant.

I point out that some of the updates to benchmark costs in the Foundation Grant will have a ripple effect. For example, updating benchmark costs for classroom supplies will affect not only the Foundation Grant, which provides a basic per pupil allocation for classroom supplies, but also certain Special Purpose Grants that, for eligible boards, supplement the basic per pupil allocation with additional funds.

In August 2002, many boards entered into a new round of collective bargaining with their teaching and support staff. The amount of additional salary and benefits costs and their effect on boards' current-year (2002–03) budgets will of course not be known until the negotiations are complete, but to foster stability in the education sector, I am recommending that the ministry allocate funds to school boards in the current fiscal year for their current negotiations.

I recommend that:

2. to foster stability in the education sector, the Ministry of Education allocate funds to school boards in the current school year (2002–03) for the current round of collective bargaining with teaching and support staff

I acknowledge that the costs involved in recommendations 1 and 2 are substantial. However, my guiding principles of adequacy and accountability, outlined in Chapter 3, compel me to recommend that the government provide an adequate amount of funding, within the bounds of the fiscal resources available to it, for the high level of academic achievement it expects.

If, as I said at the beginning of this report, the funding formula is an instrument for achieving the policy goal of continuous improvement in student learning and achievement, and if we want to ensure that a high level of achievement is sustained, the formula needs to be reviewed and updated on a regular basis. Only in this way will it continue to be an effective tool. Regular reviews should investigate whether the formula is meeting current needs, including special needs such as those related to geographic circumstances, readiness to learn, special education, and French-language education. I also believe that, as part of the review process, boards should demonstrate in a transparent way that they are spending the funds for the purposes for which they were intended.

I recommend that:

3. the Ministry of Education, in consultation with school boards and other members of the education community, develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years

While I am not recommending a specific review process, I suggest that the process involve the establishment of a co-ordinating committee, which would include stakeholder representatives and report to the Minister of Education, and subcommittees, which would also include stakeholder representatives and which would review benchmark factors and costs in individual grants and report to the co-ordinating committee. The co-ordinating committee and subcommittees could conduct both the annual review and the five-year review. The five-year review could consider structural changes to the funding formula and the impact of long-term changes in circumstances. Among the issues that could be considered are the effective and efficient use of resources by boards, accountability mechanisms, and the projections that indicate province-wide declines in enrolment over the coming years. Implicit in recommendation 3 above is the need for a multi-year funding model to provide relative stability and an element of predictability that would help both school boards and the government plan effectively.

Effectiveness of the Formula for Distributing Funds among Boards

Many of those who made presentations and submitted briefs expressed concern about the effectiveness of the formula for distributing funds among boards. I heard from northern boards that the formula does not sufficiently recognize the higher costs associated with the geography of their districts, such as the long distances students have to travel to get to school and the difficulties experienced by boards and schools in remote areas in obtaining the resources they need. French-language boards mentioned similar issues, as well as the higher costs of French-language curriculum and other learning materials and the difficulty of securing francophone specialists for programs and services, particularly in the area of special education. From the urban boards, I heard about the challenges associated with educating recent immigrants, students with special needs, and students at high risk of academic failure or dropout. Finally, several boards throughout the province described the challenge of meeting the needs of Aboriginal students.

As I noted earlier, the Ministry of Education, through the Special Purpose Grants, recognizes that one size does not fit all when it comes to education in Ontario. Special Purpose Grants were designed to address the different needs among students and among different parts of the province. Because these grants are generally well designed and supported by the education community, I believe that the recommendations I have made about updating the benchmark costs, if implemented, will go a long way towards redressing some of the problems identified above.

I deal later in this chapter with school renewal, special education, student transportation, and some other issues, but here I want to discuss four specific issues that I believe need to be addressed to improve the effectiveness of the formula for distributing funds. The first involves readiness-to-learn programs for students experiencing difficulties in school. The second is the higher costs incurred by French-language boards. The third is the sustainability of small schools that

serve unique needs in their communities. The fourth is declining enrolment. Special Purpose Grants now address these issues to some extent but, in my opinion, they do not address them fully enough. In some cases, I am recommending new strategic investments in existing grants; in other cases, I am recommending changes to the grant allocation; in one case, I am recommending a new grant.

Readiness to Learn

An important part of achieving continuous improvement in student learning and achievement is reducing the gap between high and low performers while maintaining high standards.¹⁰

An extensive literature documents the link between socio-economic disadvantage and poor results in school, as well as the success of appropriate preventive and remedial interventions in preparing children to learn, particularly in their early years.¹¹

Studies have shown that one of the best predictors of a child's success in school is "readiness to learn" as he or she starts school. In *The Early Years Study*, the Honourable Margaret Norrie McCain and J. Fraser Mustard stress the important role that can be played by family and child development services in helping preschool children overcome early disadvantages.¹² Investments in early learning bring significant paybacks. According to James Heckman, a University of Chicago economist and winner of the Nobel Prize in economics, "Investing in the very young is the most economically efficient investment society can make."¹³ Investments in learning readiness can prevent problems from arising later in school and can thus reduce the need for remedial programs in the future.

McCain and Mustard and others also suggest that children may require interventions from sources other than schools – for example, community and social services, health professionals and health agencies, recreational services, community police, and correctional and custodial services. In other words, education interventions are not the only ones needed. Other service providers, including other provincial ministries (not just the Ministry of Education), other levels of government (federal and municipal), and community groups should also be involved and should contribute to the costs of delivering the services involved, although the local community school may be the best location for delivering these services.

Although early intervention is critical to improving a young child's chances of success in school, effective readiness-to-learn programs are needed for all students at risk of experiencing difficulties in school, whether they are preschool, school-age, or about to make the transition from school to postsecondary education or work.

The present funding formula contains three Special Purpose Grants that school boards can use, in addition to the Foundation Grant, for readiness-to-learn programs and services: the Learning Opportunities Grant, the Language Grant, and the Early Learning Grant.

With each of these grants and grant components, boards have the flexibility to spend the funds on the programs and services they believe will help students achieve the greatest degree of success. Some boards, for example, have chosen to offer full-time Junior Kindergarten while others prefer to offer special literacy programs for preschoolers. This flexibility is important because it allows boards to determine what works best for their students.

In this report, I will be recommending a new investment in the Learning Opportunities Grant as well as a change in the structure of the Foundation Grant's Local Priorities Amount. If implemented, both of these recommendations will give boards additional flexibility to dedicate funds to support readiness-to-learn/at-risk programs and services.

While the existing grants can be used effectively by boards for readiness-to-learn programs for students at risk at all three stages – preschool, in-school, and the school-to-work/postsecondary education transition phase – they need to be looked at under the lens of readiness to learn. It may be that by viewing them this way the Ministry of Education and school boards will determine that to serve at-risk students best some grants should be merged or new grants added to ensure that all stages are adequately covered.

I recommend that:

4. the Ministry of Education, in consultation with school boards, other members of the education community, and other appropriate stakeholders, review and consider grouping all of the Special Purpose Grants in the funding formula that have a focus on readiness to learn for preschool children, in-school students, and youth making the transition from school to work/postsecondary education, with the goal of ensuring that these Special Purpose Grants are designed to meet the needs of at-risk children and youth effectively

Many presentations to and submissions received by the task force claimed that the Learning Opportunities Grant, the Language Grant, and the Early Learning Grant are inadequately funded. I estimate that the updates to benchmark costs recommended earlier in this chapter, if implemented, will generate an increase of approximately \$45 million for these three grants combined.¹⁴ (See Appendix I, Table I.1.) Although I believe that the issue of adequacy will be addressed to a large extent through the recommended updates, some specific funding issues were raised that need to be considered further.

Learning Opportunities Grant

The Learning Opportunities Grant (LOG) provides boards with funds to assist students at risk of experiencing difficulties in school. The LOG consists of three components:

- Demographic Component
- Early Literacy Component
- Literacy and Math for Grades 7 to 10 Component

Issues that were raised with me with respect to the LOG primarily addressed the Demographic Component of the grant. This component provides funding to school boards on the basis of social and economic indicators that have been associated with students experiencing a higher risk of difficulties in school. Boards have the discretion to use these funds to offer a wide range of programs to improve the level of achievement of these students. They can use these funds, for example, for additional educational assistants and counsellors, literacy and numeracy programs, smaller class sizes, expanded Kindergarten programs, before- and after-school programs, recreational and sports activities, nutrition programs, excursions, parenting classes, and home/school linkages.

In 1997, an Expert Panel on the Learning Opportunities Grant, appointed by the Ministry of Education and Training, recommended that the ministry collect data for at-risk programs from a representative sample of school boards that offer effective programs and practices for students at risk, and that it use this data to determine the appropriate funding magnitude for the LOG.¹⁵ I support their recommendation.

I recommend that:

5. the Ministry of Education determine the appropriate funding magnitude of the Demographic Component of the Learning Opportunities Grant by collecting and analysing data on programs and services for students at risk from a representative sample of school boards that offer effective programs and services of this nature

Until this information is available, there is no objective basis for me to make a recommendation on the magnitude of the LOG. I believe, however, that programs and services for students at risk are so important in reducing the gap between high and low performers that the ministry should put an additional \$50 million into readiness-to-learn programs even before the results of the cost analysis are complete. I am recommending that these funds be added to the LOG as an interim measure, until the appropriate data has been collected and analysed (as per recommendation 5), and that these additional funds, like the existing LOG funds, be made available to boards to use for the programs and services they believe will improve their at-risk students' readiness to learn.

I recommend that:

6. as an interim measure, pending the collection and analysis of the data on programs and services for students at risk described in recommendation 5, the Ministry of Education invest an additional \$50 million in the Demographic Component of the Learning Opportunities Grant, using the current allocation model based on the 1996 census

The ministry uses two methods to determine boards' allocation for the Demographic Component of the LOG. For most of the allocation, the ministry uses 1991 census data to look at the socio-economic characteristics of each school board's catchment area. For the rest of the allocation, the ministry uses a new

student-focused method that is based on recommendations made by a stakeholder working group in the fall of 2001. Under this new method, the ministry uses 1996 census data to look at the socio-economic characteristics of the neighbourhoods in which students of each school live.

Although, for the most part, the new allocation method focuses more accurately on at-risk students, I understand that it may need further refinement. I believe that the overall allocation method for this component of the LOG should be reviewed to ensure that it is an accurate and appropriate model for predicting students at risk, and that 2001 census data should be used as the basis for determining allocations under this component.

I recommend that:

7. the Ministry of Education review the current allocation models for the Demographic Component of the Learning Opportunities Grant to ensure that the distribution of funds to school boards under this grant is fair and equitable, and further, that the ministry update the socio-economic factors in the formula using 2001 census data

At present, boards are required to use the Literacy and Math for Grades 7 to 10 Component of the LOG for after-school and summer programs. I was told that many boards are not making full use of the funds available through this component because of these restrictions. To ensure that Grades 7 to 10 students who need remedial literacy and math programs are offered the assistance they need, I believe that the ministry, beginning in 2003–04, should reallocate the unused portion of this component to the LOG for programs and services that will serve the remediation needs of these students. As part of their accountability, boards should be required to report on how the funds have been used for this purpose.

I recommend that:

8. beginning in 2003–04, the Ministry of Education reallocate the unused portion of the Grades 7 to 10 Component of the Learning Opportunities Grant (LOG) to the LOG for programs and services for students who need remedial literacy and math programs, and further, that the ministry require school boards, as part of their accountability, to report on how the funds have been used for this purpose

Finally, while it is important that school boards be given the flexibility to use the LOG funds as they determine is best for their students, I believe that boards have a responsibility to report publicly both on how these funds are being used to reduce the gap between high and low performers while maintaining high standards and on the results achieved from the expenditure of these funds.

I recommend that:

9. the Ministry of Education require school boards that receive funds through the Learning Opportunities Grant to report publicly on how the expenditure of these funds is contributing to continuous improvement in student achievement and to the reduction of the performance gap between high and low achievers in their schools while maintaining high standards

Language Grant

One significant at-risk student population is students for whom the language of instruction (English or French) is a second language. Many of the presentations made by members of the public and by stakeholder organizations suggested that many of these students are not adequately prepared for school even in their first language.

The Language Grant comprises two components, which provide language funding for recent immigrants and for Canadian-born students who lack proficiency in the language of instruction: English as a Second Language/English Skills Development (ESL/ESD) for students in the English-language system and *Actualisation linguistique en français/Perfectionnement du français* (ALF/PDF) for students in the French-language system. The “recent immigrant” sections of the formula for allocating ESL/ESD and PDF take into account three years of data. In both cases, the level of per pupil funding declines with each successive year. The formula does not prescribe how boards should spend these funds or over how long a period they may spend them.¹⁶

The perception among stakeholders, however, is quite different. I heard from many stakeholders that the funds can only be used for three years.

Presenters told the task force that successful language training requires five to seven years. My research revealed that the ESL grant in British Columbia recognizes the additional cost of providing language instruction for a maximum of five years. I estimate that the updates to benchmark costs recommended earlier in this chapter, if implemented, will increase the Language Grant by \$25 million.¹⁷ (See Appendix I, Table I.1.) However, I believe that even this increase is insufficient to permit boards to provide the students who need to master the language of instruction with the training they require.

I recommend that:

10. the Ministry of Education increase the funds allocated under the Language Grant to reflect five years of language training for English as a Second Language/English Skills Development and for *Perfectionnement du français*

I estimate that the increase to the Language Grant for English as a Second Language/English Skills Development and Perfectionnement du français to reflect five years of language training will cost \$65 million.

On a related point, many presenters appeared to believe that Canadian-born students who lack proficiency in the language of instruction are not eligible for ESL/ESD and ALF/PDF funds or accounted for in the formula, although they are.¹⁸ I believe that the real problem is that the formula does not provide adequate funding to meet the needs boards experience in this area. My recommendations 1, 2, and 10, if implemented, will increase the funding available through the Language Grant, and therefore should improve boards' resources in this area.

Needs of Aboriginal Students

The federal Royal Commission on Aboriginal Peoples addressed issues related to Aboriginal education and concluded the following:

For more than 25 years, Aboriginal people have been articulating their goals for Aboriginal education. They want education to prepare them to participate fully in the economic life of their communities and in Canadian society. But this is only part of their vision. Presenters told us that education must develop children and youth as Aboriginal citizens, linguistically and culturally competent to assume the responsibilities of their nations. Youth that emerge from school must be grounded in a strong, positive Aboriginal identity. Consistent with Aboriginal traditions, education must develop the whole child, intellectually, spiritually, emotionally and physically.¹⁹

Responsibility for Aboriginal people lies primarily with the federal government, which provides Native bands with funding for, among other things, education. When Aboriginal students who live on reserves attend schools of a local school board, their bands make tuition agreements with the boards, using funds from the federal government, to pay for the education of the students involved. Tuition agreements provide the same amount of money per pupil for a board as the ministry's funding formula provides for the board's resident students.

I heard, in presentations and submissions to the task force by representatives of the Chiefs of Ontario and others, that Aboriginal students in many areas of Ontario, but particularly in the northwest, are achieving results in the Education Quality and Accountability Office's literacy and numeracy tests for Grades 3, 6, and 10 students at a rate well below that of the general student population. I also heard that the graduation rate of Aboriginal students is very low and that it is expected to be even lower now that the Ontario Secondary School Literacy Test (the Grade 10 literacy test) has been introduced. A further concern was expressed about Aboriginal students who arrive at school inadequately prepared to learn, particularly with respect to their skills in the language of instruction.

Because of the federal government's responsibility for Aboriginal people, I believe that it must assume a greater level of funding responsibility for Aboriginal students' readiness to learn when they make the transition from often remote reserves, where they may not have been speaking the language of instruction, to the urban centres where the schools are located. My discussion of the needs of Aboriginal students attending Ontario's publicly funded schools, however, focuses on provisions in Ontario's current education funding formula for boards' needs with respect to Aboriginal students.

Aboriginal status is one of the socio-economic indicators used to calculate the size of the at-risk student population for purposes of the LOG. The indicator is the percentage of persons who, in the census, gave “Aboriginal” as their sole ethnic origin. In view of what I have learned about the level of achievement of Aboriginal students in Ontario’s schools, I am concerned that the present LOG may not be providing boards with sufficient funds to meet the needs of these students.

At the Forum on Aboriginal Student Achievement convened by the Ministry of Education in Thunder Bay in October 2002, the Northern Ontario Education Leaders (NOEL) made several recommendations that apply to the Ontario education sector. I urge the Ministry of Education to review, analyse, and consider implementing the recommendations that came out of that forum.

I understand, from comments made by NOEL at the forum in October 2002 and from additional research, that other provinces have introduced special grants for Aboriginal students. In British Columbia, for example, school districts receive a supplement of \$950 (2002–03) for each Aboriginal “full-time equivalent” student. This targeted grant requires school districts to spend this money on Aboriginal education with a view to improving this at-risk group’s level of achievement. While there is insufficient data to determine the magnitude of the funding needed to meet the education needs of Aboriginal students in Ontario’s publicly funded school systems, and such a needs assessment is a necessary first step, I am nevertheless recommending, as a priority, that once this data has been gathered, the Ministry of Education implement a grant targeted at the educational needs of Aboriginal students who are not living on reserves.

I recommend that:

11. the Ministry of Education obtain accurate data to establish the extent of school boards’ needs related to the provincial role in the education of Aboriginal students and, on the basis of this data, implement a new grant targeted at the educational needs of Aboriginal students who are not living on reserves, and further, that the ministry require boards that are eligible for this grant to spend it on programs and services for Aboriginal students and to publicly account both for the expenditures and the results achieved
12. the Province work with Aboriginal leaders and the federal government to ensure that there is an integrated approach to and adequate funding for the education of Aboriginal students

Integrated Services for Children

At the beginning of this “Readiness to Learn” section, I discussed some of the research that indicates that preschool children, in-school students who are experiencing academic difficulties, and students preparing to make the transition from secondary school to the workplace or postsecondary education may require interventions from a variety of service providers to improve their readiness to learn and their chances for success in school and later in life.

In 1997, the Expert Panel on the Learning Opportunities Grant, in its report to the Minister of Education and Training, noted that at-risk students often have multi-dimensional problems that require multidisciplinary solutions.²⁰ These students come to school with a variety of health care and social service needs. Schools are increasingly under pressure to provide services, such as speech therapy or occupational therapy, that respond to these needs, even though these services may properly be the responsibility of the federal government, provincial ministries other than the Ministry of Education, municipalities, or community organizations, or a combination of these entities.

Several provincial ministries and municipal agencies do focus on and provide services to families of at-risk students, but these services are not usually offered in a co-ordinated fashion. Children who require services from two or more government or non-government organizations often encounter gaps or duplication in service, which is frustrating for both the children and their parents. In my opinion, schools, community and social services, health professionals and agencies, recreational services, community police, and correctional and custodial services – and the federal, provincial, and municipal government ministries and agencies responsible for them – must collaborate in providing and in funding these services.

Integrated services would go a long way towards helping schools meet students' needs in all of the readiness-to-learn areas I have discussed in this section of the report, as well as special education needs.

The Ministry of Education, through its Special Education Project and in collaboration with the Ministry of Health and Long-Term Care and the Ministry of Community, Family and Children's Services, is analysing service co-ordination issues and developing policy recommendations. To ensure that the policy recommendations reflect the views of all ministries and stakeholders involved in and concerned about special education issues, the project created an umbrella group, the Co-ordinated Services Advisory Committee. I applaud this initiative.

At the same time, I believe that a more wide-ranging and higher-level initiative is required to co-ordinate services, and the funding of services, for at-risk children and youth. I am therefore recommending a Cabinet-level advisory council to encourage collaboration and co-ordination of such services and funding. Although I believe that the funding mechanisms need to be aligned, I recognize that ultimately the taxpayer pays for these services, regardless of which ministry provides them.

I recommend that:

13. the government establish a Cabinet-level advisory council on integrated services for children and families, composed of representatives from the Ministries of Community, Family, and Children's Services, Education, Health and Long-Term Care, Public Safety and Security, and Tourism and Recreation, to meet on a regular basis to align the work and the funding mechanisms of the ministries that serve families, children, and youth

Needs of French-Language Boards

The brief submitted to the task force by the 12 French-language boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques, pointed out that the costs incurred by French-language boards are significantly higher than those of English-language boards. They highlighted three reasons for the higher costs.

First, French-language boards have facilities, enrolments, and average school sizes that are smaller than those of English-language boards. As a result, French-language boards generally cannot benefit from economies of scale in the same way that English-language boards do. Second, French-language boards operate over vast territories. The distances between schools and board offices make it difficult to share resources and require more travel, both of which increase costs. Third, material resources, specialized human resources, and community support in the French language are extremely difficult to obtain and often non-existent in the communities served by French-language boards. This lack of resources and supports leads to additional costs as French-language boards try to offer programs and services comparable to those offered by their English-language coterminous boards. It also makes it difficult for them to maintain the French-language learning environment and cultural values they are striving to provide for their students.²¹

Grants in the funding formula address many of the concerns expressed by the French-language boards, and I believe that my recommendations will also do so. For example, increased grants for small schools and for transportation, which I recommend later in this chapter, if implemented, will be of particular benefit to French-language boards because of their size and the distances travelled by their students. My recommended updates of benchmark costs and a recommendation I make later in this chapter related to the Local Priorities Amount, if implemented, will increase funds for all boards. Notwithstanding these recommendations, I believe that the Ministry of Education should review and amend as necessary all components of the funding formula to ensure that each of the grants recognizes the higher costs experienced by French-language boards.

I recommend that:

14. the Ministry of Education review the brief submitted to the task force by the 12 French-language school boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques and amend the funding formula as appropriate to ensure that each of the grants in the formula recognizes the higher costs experienced by French-language boards in delivering education programs and services

Small Schools

I heard many presentations and received many submissions from parents, school councils, trustees, boards, MPPs, and municipal representatives emphasizing the importance of sustaining small schools in their communities. I found the arguments for keeping small schools open most compelling when the school involved was the only school a board had in the community. Where these schools face the prospect of closing, people want to find some way to keep them open. Where a decision has been made to keep these schools open, people are concerned that the funding formula limits the ability of boards to obtain the core-staffing support these schools need to offer a high-quality education and a safe learning environment to their students.

Usually, small schools are candidates for closure because their enrolment is small in relation to the capacity of the building. In addition, the school's enrolment may be so low that it falls below the benchmark factors in the funding formula. These benchmark factors require that a certain board-wide average school size be met before sufficient funding is generated to maintain a school building and to provide the core staff, programs, and services needed to create a high-quality and safe learning environment in that school.²²

In general, a decision to close a small school and move the students to another school or to “consolidate” two or more small schools represents responsible management on the part of school boards. In most instances, consolidation provides students with a greater concentration of learning resources and educational opportunities in one location. However, consolidation of schools in rural, northern, and French-language boards may significantly increase students' school-bus travelling time, adversely affecting the overall educational experience of the students involved, and result in the closing of a building that has been a hub for community activities.

Distance and travelling time are important criteria to consider in determining whether to close a small school or keep it open. Other key criteria should include the physical condition of the school, enrolment levels, the presence or absence – because of low enrolment – of specialized programs, and whether the school is the only one serving a unique need in the community, such as providing French-language education.

When a board has decided, on the basis of credible criteria and a transparent decision-making process, to keep a small school open, it is important that the school receive core-support funding to ensure that it has a sound foundation from which to create a high-quality and safe learning environment. In my view, the minimum core supports needed by a small school are a full-time principal and secretary, a full-time custodian, and, at the secondary school level, a full-time individual to provide advice on career and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements.

For many boards, the funding formula provides a certain amount of core-support funding through the following grants and allocations. Under the School Operations and School Renewal Allocations of the Pupil Accommodation Grant, if a school's enrolment is below the school's capacity, additional "top-up funding" is provided. The Small Schools Allocation and its Principals Component and the Remote and Rural Allocation of the Geographic Circumstances Grant also contain additional funding for small schools.

In addition, some boards have an average school size that, by itself, is sufficient to generate funds for a principal for a small school that they have decided to keep open, although they may not be able to fund the other core elements described above. In a number of cases, boards that do not have the requisite average school size have decided to allocate funds – often at the expense of other program areas – to meet some or all of the core-support staffing needs of the small schools that they have decided to keep open.

The updating of benchmark costs that I recommended earlier in this chapter offers a partial response to this situation, because, if implemented, it will provide many boards with additional funding to sustain those small schools that they decide to keep open. Grants that are particularly likely to generate increased funding for small schools include the Foundation Grant, certain Special Purpose Grants mentioned above (the Small Schools Allocation and its Principals Component and the Remote and Rural Allocation of the Geographic Circumstances Grant), and, also mentioned above, the School Operations and School Renewal Allocations of the Pupil Accommodation Grant. These updates are also likely to allow boards to cover the costs of any additional staff or programs that they have determined, in their decision-making process, are required in the small school that they are keeping open.

In addition to staff and programs, all schools need to provide students with a safe, clean, and well-maintained environment. I estimate that updating the benchmark costs will increase the School Operations Allocation, which covers custodial services (among other aspects of operating a school), by approximately \$165 million.²³ Moreover, as noted above, the existing funding formula contains a provision for top-up funding of both the School Operations and the School Renewal Allocations for schools that are operating at less than full capacity (although certain limitations apply). These two provisions are likely to provide boards with the funds they need to ensure that their small schools are safe, clean, and well maintained.

Nevertheless, where a board has a small school in a single-school community, it may need additional core-support funding for that school. In this situation, consolidation of the school with another one in the community is not a choice. In addition, boards in this situation generally have smaller board-wide enrolments than other boards and, as a result, it is likely that they will derive only a limited benefit from updates to the benchmark costs. I am therefore recommending that the Ministry of Education provide them with additional funding through the Geographic Circumstances Grant to enable them to achieve the core-support staffing that will make their small schools viable enough to provide a high-quality and safe learning environment.

I recommend that:

15. the Ministry of Education allocate core-support funding through the Geographic Circumstances Grant to school boards that have decided to keep open a small school in a single-school community and that, under the updated Foundation and Special Purpose Grants (that is, updated as described in recommendation 1), do not have an average school size that is sufficient to generate funding for core-support staff for that small school, and further, that the core-support funding cover the following:

- a full-time principal and secretary for each elementary and secondary school
- a full-time support staff person for each elementary and secondary school to ensure a safe, clean, and well-maintained school, and
- a full-time individual in a secondary school to provide advice on careers and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements

I estimate that core-support funding for small schools in single-school communities will cost \$50 million.

I believe that the intent of recommendations 15 is clear – where a board has made a decision, on the basis of credible criteria and a transparent decision-making process, to keep a small school open, the board should receive the core-support funding it needs to provide a high-quality and safe learning environment in that school. The availability of this core-support funding should not, however, be interpreted by boards as encouragement to keep schools open when, in the board’s judgement, closure and consolidation are possible and in the best interests of student learning and the district’s overall plan and goals.

One further issue that needs clarification is the relationship between the capacity of small schools in single-school communities and the process for justifying “new pupil places” – that is, additions to schools or new schools. At present, to justify new pupil places, only boards whose elementary and secondary enrolments exceed the “rated” capacity of their schools are eligible for funding for new pupil places.²⁴ I urge the ministry to review the benchmark factors and capacity criteria in the New Pupil Places Allocation of the Pupil Accommodation Grant to ensure that boards that have small schools in single-school communities are not penalized for keeping those small schools open.

Declining Enrolment

The Declining Enrolment Adjustment was introduced in the current year (2002–03) against a backdrop of decreased enrolments in some boards. I heard that the major concern about this grant is the length of time the Ministry of Education allows a board to bring its costs in line with its decreased enrolment levels. The grant allows for a two-year adjustment period. Many presenters suggested that this period should be extended to three years.

Because enrolment is projected to decline across the province over the next few years, the issue of the period of adjustment will be a matter of increasing concern to many boards. Boards' revenue is based to a large extent on enrolment. When enrolment declines, board revenue declines as well. However, because many of a board's expenditures are fixed costs, boards often find it hard to adjust their expenditures as quickly as their revenue declines. They need time to adjust, and I am persuaded that two years is not enough.

I recommend that:

16. the Ministry of Education extend the duration of the Declining Enrolment Adjustment to three years

I estimate that extending the duration of the Declining Enrolment Adjustment will cost \$5 million.

Earlier in this chapter, I recommended that the Ministry of Education work with stakeholders to “develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years” (recommendation 3). In view of the projections for declining enrolment, one of the aspects of the formula that the ministry and its stakeholders may wish to review is the enrolment-sensitive nature of the student-focused funding formula. Some board costs that are funded on a per pupil basis, such as those related to small schools and special education, may be particularly affected by declining enrolment. I suggest that such a review is warranted.

Boards' Flexibility with Respect to Local Expenditures

Flexibility is one of the guiding principles of my recommendations – that is, that the funding formula should allow boards and their schools a certain amount of discretion in assessing their local needs and in spending part of their funding allocation to address those local needs that advance the continuous improvement of student learning and achievement.

The Foundation Grant's Local Priorities Amount (LPA), introduced in 2001–02, is a per pupil allocation that was intended to give boards the flexibility to address local priorities. I was told during my consultations, however, that boards do not use these funds for local priorities. Instead, they direct them to areas that they feel are inadequately funded because the funding formula's benchmark costs have not been updated. Boards therefore maintain that, at present, they do not have sufficient flexibility to address local needs.

The updating of benchmark costs that I recommended earlier in this chapter, if implemented, will provide boards with additional resources. With adequate funds, boards will have more flexibility to fund programs that meet local needs, since only a few specific limits apply to their use of their allocations.²⁵

During my consultations, boards outlined some of the local priorities they have and for which they would like to use the LPA. Some boards would like to use it to supplement other grants. For example, French-language boards consider full-time Junior and Senior Kindergarten to be both educational and cultural priorities, and they would like to use the LPA to fund them. (The funding formula provides funds for half-day Junior and Senior Kindergarten.) Other boards would like to reduce class sizes in Junior Kindergarten through Grade 3, especially where they have many at-risk students. Still others would like to use their LPAs to enhance their education programming in general.

There are other areas in which boards may wish to invest their LPAs. For example, some boards may want to invest in technology to implement distance learning. Others may want to use their LPAs to fund leadership- and capacity-building programs in local schools or groups of schools, as part of their efforts to continuously improve the level of student achievement.

I am recommending that the LPA be changed from a per pupil amount to 5% of the Basic Amount of a board's Foundation Grant. If this recommendation is implemented, and if the updates to benchmark costs and the regular reviewing and updating processes that I recommended earlier in this chapter are implemented, the LPA would grow in tandem with updates to the Foundation Grant. It would therefore enhance boards' flexibility to address their local needs and priorities.

To honour my guiding principle of reciprocal accountability, I believe that, in return for the LPA funding, boards should be required to demonstrate that they are using their LPA funds to advance the goal of continuous improvement in student learning and achievement in individual schools and in the district as a whole. They should consult, through their director of education, with their principals and school councils on how to use the LPA funds and then develop improvement plans for the use of these funds. They should then annually review the plans and report publicly to all stakeholders and to the Ministry of Education on the results achieved through the implementation of the plans, in individual schools and in the district as a whole.

I recommend that:

17. the Ministry of Education reconstitute the Local Priorities Amount as 5% of the Basic Amount of school boards' Foundation Grants (updated as per recommendations 1 and 2), and that boards apply the Local Priorities Amount to locally established priorities, programs, and services aimed at the continuous improvement of student learning and achievement
18. the Ministry of Education require school boards, through their directors of education, to consult with principals and school councils for the purposes of developing a plan for the use of the Local Priorities Amount, and to annually review the plans and report publicly to all stakeholders and to the ministry on the results achieved through the implementation of the plans, in individual schools and in the district as a whole

School Renewal (Pupil Accommodation)

In my mandate, I was specifically asked to look at approaches to funding school renewal, including areas such as maintenance, repairs, and renovations. The funding formula addresses these areas through the Pupil Accommodation Grant, which has four components: School Operations, School Renewal; New Pupil Places, and Prior Capital Commitments. As with the Foundation Grant and the Special Purpose Grants, the major concerns I heard about the Pupil Accommodation Grant were related to adequacy of funding, particularly with respect to the School Operations, School Renewal, and New Pupil Places Allocations. In this section of the report, therefore, I focus on boards' costs in these areas.

School Operations

The costs involved in operating a school include such items as insurance, heating, lighting, cleaning and other maintenance, and maintenance supplies and equipment. The benchmark operating cost per square foot has been set at \$5.20 since the current funding formula was introduced in 1998. Since that time, however, boards have faced significant cost increases in most school operations areas. I believe that, as with other areas of the funding formula, the benchmark costs for the School Operations Allocation should reflect boards' actual costs.

If the updates to benchmark costs that I recommended earlier in this chapter are implemented, I estimate that boards will receive an additional \$165 million under the School Operations Allocation.²⁶

School Renewal

The term "school renewal" is used to refer to major repairs and renovations needed by schools. Two school renewal issues were raised with me during the consultations: the first is related to the routine, cyclical requirement to repair and replace items such as roofs, windows, heating and ventilation systems, and electrical systems; the second is related to "deferred maintenance" or the backlog of repairs needed by schools that has accumulated over an extended period of time.

With respect to the first issue, various organizations have established guidelines for what is called "facilities renewal."²⁷ These organizations recommend that governments annually provide a minimum of 1.5% to 4% of the current facility replacement value of a building for renewal needs, including alterations that change the building's use as well as those that are made to conform to changes in building codes, building standards, and access requirements. At present, the Ministry of Education allocates \$266 million to school renewal on an asset base of approximately \$28 billion, which amounts to less than 1% of the current facilities' estimated replacement value.²⁸ I believe that this is inadequate to meet boards' school renewal needs.

With respect to deferred maintenance, I learned that the cost of repairs needed in schools is substantial – approximately \$5.6 billion and growing. Boards claim that the backlog has accumulated as the result of many years of inadequate funding for school renewal. Boards and other stakeholders told me that, even if the province updates its benchmarks and provides adequate funding for school renewal, it will still face the question of how to address the backlog of necessary repairs.

The Ministry of Education has begun working with school boards to assess school renewal needs in an objective and systematic fashion. I fully support that initiative. It will provide better data with which to evaluate the full extent of deferred maintenance, identify areas of greatest need, and estimate, in a way that is relevant to Ontario's elementary-secondary education sector, the annual renewal costs associated with the existing inventory of schools.²⁹

If the updates to benchmark costs that I recommended earlier in this chapter are implemented, I estimate that boards will receive an additional \$25 million for school renewal.³⁰ However, because of the substantial backlog of school renewal needs, I am also recommending two new strategic investments.

First, I am recommending that the Ministry of Education allocate \$50 million for boards to use to address their most pressing school renewal needs. The intent of this recommendation is to begin to reduce the significant gap between the ministry's existing School Renewal Allocation and current industry standards for facility renewal funding.

Second, I am recommending that, as part of the initiative to assess school renewal needs described above, the ministry provide an annual allocation of \$200 million for boards to use to pay the principal and interest costs they would incur in financing the substantial capital borrowings they would need to begin addressing their deferred maintenance needs. The ministry should use the results of its school renewal needs assessment to determine how best to allocate these funds to boards to ensure that schools that are most in need of repair receive appropriate attention. The annual allocation of \$200 million would be a "deferred maintenance amortization fund," which I estimate that boards could use to leverage \$2 billion worth of financing for renewal work. The \$2 billion figure was arrived at using the ministry's standard guidelines for the Pupil Accommodation Grant, which estimate that \$1 in grants to cover principal and interest costs (amortization costs) will allow boards to leverage \$10 in financing, based on a 25-year amortization period and an assumed interest rate of 8%. Such an amortization fund could significantly reduce the deferred maintenance problem faced by school boards.

I understand that the Ontario School Board Financing Corporation and the Ontario Financing Authority are discussing ways to secure the capital financing required for boards' deferred maintenance costs through the use of debentures. I support these discussions. The debenture route would ensure that boards obtain financing under the most favourable terms available in the investment market.

I recommend that:

19. the Ministry of Education make a new strategic investment of \$50 million in the School Renewal Allocation for school boards to use to address their most pressing school renewal needs
20. the Ministry of Education allocate a new strategic investment of \$200 million annually to a “deferred maintenance amortization fund,” which would fund the principal and interest costs of school boards’ payments to service the debts boards would incur in borrowing funds so that they could begin to address their deferred maintenance needs

New Pupil Places

My consultations revealed that boards generally support the concept and structure of the New Pupil Places Allocation, although I heard some concerns about both the current benchmark factors and the current benchmark costs. The allocation provides amortization funding for school boards to service their loans for construction of new schools and additions to schools.

Early in this chapter I recommend that all benchmark costs in the funding formula be updated. Appendix H explains my approach to updating benchmark costs in more detail. In it, I note that the Ministry of Education and its stakeholders will want to refine my approach for their own review and update of these costs. The benchmark construction costs for the New Pupil Places Allocation is one place where I am recommending that they make refinements.

There are two kinds of construction costs for new pupil places – “old” and “new.” Once a school or a school addition is constructed and even once construction is well under way, the construction costs for that school do not change. Therefore, for the purpose of allocating the amortized funding, the ministry does not need to adjust these costs to reflect annual increases in cost indexes. However, the projected construction costs for new schools and major renovations and additions to existing schools are subject to inflationary and other increases. I believe that the funding for “new” construction should be subject to regular updates.

My estimate of the cost of updating the benchmark costs in the New Pupil Places Allocation does not differentiate between funding for “old” and “new” construction costs because of the difficulty involved in separating these two costs in the current funding allocation. In the following recommendation, I recommend that the Ministry of Education review this issue and ensure that funding for “new” construction reflects updated benchmark costs. (See also Appendix J, Table J.2.)

I recommend that:

21. the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected

In my discussion of the issues related to school renewal, I mentioned the current deliberations between the Ontario School Board Financing Corporation and the Ontario Financing Authority on the best ways for boards to finance school renewal costs. I suggest that these deliberations include the most effective and efficient way to structure debt financing for new school construction and to help boards raise the necessary capital for this construction.

Prior Capital Commitments

The Ministry of Education maintains a Prior Capital Commitments fund to help boards finance loans related to capital projects approved before 1998 and the introduction of the current funding formula. Because of its nature, the fund has no benchmarks and therefore it has no benchmark costs to update.

Over time, as boards retire their capital debt related to projects approved before 1998, this fund will no longer be needed. I believe that the Ministry of Education should consider using the funds that are “freed up” as boards retire the capital debt serviced under this category of the funding formula for other purposes related to pupil accommodation, such as helping boards address their deferred maintenance and ongoing school renewal needs.

Special Education

The Special Education Grant provides boards with funding to support the additional programs, services, and equipment required to meet the needs of students who could be or who have been identified as “exceptional pupils.” Section 1 of the Education Act defines an “exceptional pupil” as follows: “a pupil whose behavioural, communicational, intellectual, physical or multiple exceptionalities are such that he or she is considered to need placement in a special education program...”

The grant has two components: the Special Education Per Pupil Amount (SEPPA) and the Intensive Support Amount (ISA).

The SEPPA, which is allocated to boards on the basis of total enrolment, recognizes that a certain portion of any student population will include students with special needs (“exceptional pupils”) and that there are costs associated with delivering the special programs and services these students need to succeed in school. The ISA is allocated to boards on the basis of their “incidence rate” of students with intense needs who require proportionately costlier services. ISA has four levels: ISA 1 covers the incremental cost of an individual student’s

equipment needs in excess of \$800 in the year of purchase. ISA 2 and 3 cover the cost of providing the intensive staff supports required by students with a very high level of need (usually a small number in any student population). ISA 4 provides funding for education programs provided by boards to students in facilities such as hospitals, children’s mental health centres, psychiatric institutions, detention and correctional facilities, community living or group homes, and other social service agencies.

In the 2001–02 school year, the Ministry of Education began a comprehensive review of ISA funding. During this review, boards have been asked to submit claims for funding for students whom the boards believe qualify under ISA 2 and 3 eligibility criteria. Claims are being submitted over an extended period of four cycles between November 2001 and December 2002. During the comprehensive review, the ministry has continued to provide “stable” funding (the same level of ISA 2 and 3 funding that boards were allocated for the 2001–02 school year), but the funding process has yet to “go live” – that is, it does not yet reflect the claims approved during the review.

Many of those who made presentations and submissions to the task force on the Special Education Grant told me that they were initially pleased with the Special Education Grant as it was introduced in 1998 in the student-focused funding formula. The initial allocation ensured that all school boards receive SEPPA and ISA funding and that special education funds are “protected” – boards cannot use these funds for any other purpose. They expressed concerns, however, about the following: the adequacy of the current level of funding, the absence of any mechanism for assessing the effective use of special education resources, the administrative burden associated with ISA claims, and the current focus of boards on generating revenue through the ISA review process (referred to as “diagnosing for dollars”), which some said reinforced negative perceptions of students’ potential.

The submission of the Minister’s Advisory Council on Special Education (MACSE) maintained that, as a result of the ISA review process and the possibility that boards could generate additional revenue through it, boards are focusing on assessing the needs of students with very high levels of exceptionality (although, the submission says, not always on the special programming needed by these students), but not necessarily on assessing the needs of students with mild to moderate exceptionalities. MACSE also expressed concern about the proportion of the Special Education Grant that goes to the ISA component.

I was also told that the funding formula provides boards with insufficient funding for the transportation of special education students, and that the formula does not recognize the higher costs experienced by French-language, northern, and rural boards in obtaining supports for these students (for example, psychologists and other specialists in the health-care field).

I am making recommendations on a number of issues raised by MACSE, but it made many more comments and suggestions that I am not able to address in this report. I am therefore recommending that the Ministry of Education review and consider the recommendations in MACSE’s submission to the task force.

I recommend that:

22. the Ministry of Education review and consider the recommendations in the brief submitted to the task force by the Minister's Advisory Council on Special Education

My first recommendations with respect to the Special Education Grant address the issue of funding adequacy. As a start, let me note that I estimate that updating benchmark costs, as recommended earlier in this chapter, will provide an additional \$88 million for special education.³¹ In addition to the updates, I am recommending that in the 2003–04 school year, following completion of the comprehensive ISA funding review, the ministry “go live” with funding for all approved ISA claims. Based on ministry estimates, I project that the additional annual funding required for all approved claims will be approximately \$250 million. I am also recommending that, in the interim, to foster stability in the education sector, the ministry fund in the current school year (2002–03) all claims approved up to the end of cycle 3 (the last cycle completed at the time I wrote this report). I estimate that the current-year funding will cost approximately \$130 million of the projected annual \$250 million.

I am further recommending that the ministry develop a transportation policy for students with special needs.

As for the higher special education costs experienced by French-language boards, my recommendation 14 asks the Ministry of Education to review all grants to address the higher costs experienced by French-language boards.

I recommend that:

23. in the 2003–04 school year, following completion of the comprehensive review of the Intensive Support Amount funding, the Ministry of Education fund school boards for all claims approved during the review

I estimate that the annual cost of funding all approved Intensive Support Amount claims will be approximately \$250 million.

I recommend that:

24. to foster stability in the education sector, the Ministry of Education allocate \$130 million to school boards in the current school year (2002–03) to fund all claims approved up to the end of cycle 3 of the comprehensive review of Intensive Support Amount funding
25. the Ministry of Education develop a funding policy for the transportation of students with special needs

Special education stakeholders raised two additional concerns about the adequacy of special education funding, particularly SEPPA, for secondary students.

First, they contend that the per pupil SEPPA allocation for secondary students in the funding formula,³² which is based on boards' average spending levels in 1997, does not reflect boards' current costs for secondary students with special needs. Stakeholders maintain that the challenges of the new curriculum require boards to provide extra support to many students, and that students with special needs require an even greater level of support. Moreover, the incidence of students in the elementary system with high needs has increased (as documented in data from past ISA reviews), and these students will be moving into the secondary system in the near future.

Second, the new secondary school curriculum, which is four years long instead of five, may reduce the amount of SEPPA funding available to boards, since SEPPA is based on total enrolment, but not the number of students with special needs or the time they spend in secondary school. As a result, boards may have less revenue to meet the needs of secondary school students with special needs, but no reduction in the costs of the programs and services required by these students.

To address this issue, I am recommending that the SEPPA for secondary school students be increased to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then be increased by a further 10% to support a high level of special education programs and services at the secondary school level.

I recommend that:

26. the Ministry of Education increase the Special Education Per Pupil Amount (SEPPA) for secondary school students to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then increase the SEPPA by a further 10% to support a high level of special education programs and services at the secondary school level

I estimate that the cost of increasing the SEPPA as described in recommendation 26 will be \$19 million.

In presentations and submissions to the task force, I heard many comments about the high administrative burden associated with ISA funding and the requirement that boards submit annual claims that document assessments and diagnoses of students with special needs. Presenters maintained that the ISA claims process, which they say boards use to generate revenue, has diverted boards' attention from the programs and services required by students with special needs. They expressed a desire to turn the focus away from revenue generation and towards the effective use of resources.

I believe that part of the problem is inadequate resources. I note that the Ministry of Education has provided boards with an additional \$10 million in 2002–03 for ISA assessments. I also note that the ministry and school boards have almost completed the ISA review. Nonetheless, I urge the ministry, in consultation with

the ISA Working Group,³³ to develop an approach to funding that, starting in the 2003–04 school year, will significantly reduce boards’ administrative burden related to the ISA claims process. As part of this effort, in the future, boards should be required to assess only new students with special needs (that is, students who have never been assessed by any board) and students whose needs have changed.

Ministry policy, and the overall goal of those who work with students with special needs, is to have boards develop Individual Education Plans (IEPs) for these students that focus on their needs and strengths, rather than their exceptionalities, and then to implement and monitor these plans, adjusting them as necessary. However, special education stakeholders raised concerns about the effectiveness of the programs and services provided to students with special needs in enhancing these students’ achievement levels. In his 2001 Annual Report, the Provincial Auditor noted that the Ministry of Education does not have the information or a process to determine whether the special education programs and services it funds are being delivered effectively and efficiently and whether they are meeting their objectives.³⁴

I believe that school boards should be held accountable for meeting the needs of these students and for delivering the programs, services, and accommodations set out in the students’ IEPs. I understand that the ministry has engaged stakeholders over the past two years in a standard-setting process that is attempting to define appropriate special education programs and services. MACSE noted in its submission to the task force, and I concur, that final approval of these standards and their release would go a long way towards helping boards define the core special education programs and services they should be providing.

I recommend that:

27. the Ministry of Education, following a brief period of consultation on its “Proposed Standards for Special Education Programs and Services Common to All Exceptionalities,” publish an approved set of standards and, if necessary, adjust the funding formula to provide school boards with funding to implement the new standards

MACSE, in its submission to the task force, recommended that, as part of an accountability framework, the ministry fund applied research aimed at helping boards build the capacity to develop effective and cost-efficient plans and programming for students with special needs and appropriate ways to measure whether these plans and programs are improving the achievement levels of students with special needs. I support this recommendation and urge the ministry to consider it along with the other recommendations in the MACSE submission to the task force (see recommendation 22).

Student Transportation

As part of my mandate, I was asked to address funding issues related to transportation. The existing transportation allocation formula has been carried over from the old funding formula – the one that preceded student-focused funding. It was not revised when the new funding formula was introduced in 1998. In the spring of 1998, the Ministry of Education established a Transportation Funding Review Committee that includes stakeholders to recommend a new approach to funding student transportation. Considerable effort has been invested since then in the development of a needs-based model.

In recognition of increased fuel costs and as a transition measure until the new transportation formula is in place, the ministry added \$23 million to the base Transportation Grant allocation in 2001–02 as well as \$6.3 million in transition funding related to the transportation costs of boards experiencing declining enrolment. The government's 2002 budget announced an additional \$20 million annually for the Transportation Grant, but this money has not yet been included in boards' allocations for the current year.

I heard the following concerns about the current Transportation Grant:

- It does not reflect all of the increases in the cost of fuel and significant increases in the cost of school buses, school bus operators, licensing, inspections, insurance, vehicle maintenance, and safety. It also lacks a review mechanism for dealing with rising costs.
- There are no province-wide transportation guidelines on common walking distances or maximum ride times, especially for students in Junior Kindergarten to Grade 3.
- It does not address boards' increasing concerns about safety issues and the need for transportation safety programs.
- It does not specifically take into account costs related to the transportation of students with special needs.
- It does not promote or reward the co-operative efforts of boards that have formed regional transportation consortia.
- By using pre-1998 board expenditures as the basis for the existing allocation, the grant perpetuates historical inequities because it does not recognize that some boards had relatively low expenditure levels in the pre-1998 period because they had implemented cost-saving measures.

I heard considerable support for the immediate implementation of a needs-based funding formula – that is, one that takes into account student needs instead of the existing historical allocation – and I agree that the issue is urgent. I am recommending that the Ministry of Education build on the extensive work already done by the Transportation Funding Review Committee and complete the development of a needs-based Transportation Grant as quickly as possible. The ministry also needs to address the transportation costs associated with special education needs, as noted in recommendation 25, and with safety programs.

I recommend that:

28. the Ministry of Education complete the development of a Transportation Grant that is based on need, that includes a mechanism for annual reviews and updates of school boards' student transportation costs, and that recognizes the costs associated with the transportation of students with special needs and the implementation of transportation safety programs

I estimate that the general updating of costs recommended earlier in this chapter will result in an additional \$80 million for the Transportation Grant,³⁵ on top of the \$23 million added in 2001–02. Because boards have particularly urgent cost pressures related to student transportation, and to foster stability in the education sector, I am recommending that the \$20 million in additional funding announced in the government's 2002 budget and referred to above be allocated to boards in the current school year 2002–03.

I recommend that:

29. to foster stability in the education sector, the Ministry of Education allocate the \$20 million increase in funding for school transportation that was announced in the government's 2002 budget to school boards in the current school year (2002–03), and that it direct these funds to those boards that are most in need to help them address transportation cost pressures

I am impressed with the many co-operative transportation arrangements school boards have developed over the past few years. Regional consortia and other co-operative measures demonstrate a high level of cost-effectiveness in the spending of education funds. I believe that school boards and the Ministry of Education should work together to develop a province-wide system of regional transportation consortia.

A concept that was presented in a submission to the task force and that I find particularly interesting is the establishment of 8 to 10 transportation "regions" in the province with a "service board" in each one. The service board would be responsible for purchasing services from transportation vendors. While school boards in a designated region would be encouraged to form consortia to achieve cost benefits, individual boards could choose not to belong to these consortia. However, they would be required to purchase transportation services from vendors through the consortia. They would also be expected to contribute to the development of their regional consortium's policies. The service boards would be funded by the participating boards. This approach offers the potential for a consistent standard of transportation services that is appropriate to the region (such as guidelines on walking distances and ride times), efficiency of operations, and a substantial level of cost-effectiveness.

I recommend that:

30. the Ministry of Education consult school boards and other appropriate stakeholders to facilitate a move towards the implementation of a “regional service boards” approach to the delivery of student transportation

The regional service boards model can also be applied to other board business functions such as purchasing. Some boards have already set up purchasing consortia similar to this model. In fact, it is evident that boards have engaged in a considerable amount of co-operation in sharing best practices and participating in consortia aimed at securing goods and services in a cost-effective manner. I encourage them to continue to pursue co-operative ventures. In a very positive step, the ministry recently established a co-operative services website for business personnel in the boards. To date, the website is providing partnership information, examples of innovative business practices, and an “e-conferencing” facility for boards’ business personnel.

Teachers’ Qualifications and Experience

The concerns expressed to me during my consultations about the Teacher Qualifications and Experience Grant focused on three issues: inadequate funding, the current average secondary school student credit load recognized by the funding formula, and boards’ problems recruiting and retaining teachers.

The main purpose of the Teacher Qualifications and Experience Grant is to address the high teacher salary costs faced by those boards that have a large proportion of highly qualified and experienced teachers. (Boards around the province have different proportions of teachers with high levels of qualifications and experience.) With respect to this issue, I estimate that the updates to benchmark costs recommended early in this chapter will increase the Teacher Qualifications and Experience Grant by \$30 million.³⁶

The grant also contains an allocation that recognizes that boards require more teachers when students take higher than average credit loads. The Foundation Grant provides funding for the number of secondary school teachers required when students take an average of 7.2 credits, which was the actual average secondary student credit load in 1997. The Teacher Qualifications and Experience Grant provides boards with additional funding where a board’s average secondary school credit load exceeds 7.2 credits up to a maximum of a board-wide average of 7.5 credits.

Under the new secondary school curriculum, students are expected to graduate with a required 30 credits in four years. The 30-credit requirement is a minimum; students may take additional credits, and boards have been reporting gradually increasing average credit loads. For the current school year (2002–03), over 50 boards are reporting average credit loads of greater than 7.5. Adjusting the

maximum board-wide average recognized by this grant would acknowledge the higher costs associated with employing additional teachers when students take higher than average credit loads in line with the expectations of the new curriculum.

I am therefore recommending that the Ministry of Education review the credit-load factor and make an appropriate adjustment to the funding formula.

I recommend that:

31. the Ministry of Education adjust the credit-load factor in the funding formula in light of the new secondary school curriculum

With respect to the recruitment and retention of teachers, it is apparent that the teaching profession is undergoing considerable change. An increasing number of teachers are retiring, reflecting the general trend of an aging Ontario workforce. Boards face a challenge in recruiting and retaining good teachers, because starting salaries for new teachers are lower than starting salaries in other professions that require similar skills.

In view of this situation, I urge the Ministry of Education to consider adjusting the benchmark factors of the instructional salary matrix that is used to calculate the Teacher Qualifications and Experience Grant.

Technology

The benchmarks in the Foundation Grant include three categories related to the costs associated with the classroom use of information and communications technology (ICT):

- “textbooks and learning materials”: includes instructional software, CD-ROMs, Internet expenses, and technology that supports distance education; associated benchmark cost, \$75 per elementary pupil and \$100 per secondary pupil
- “classroom computers”: includes hardware and associated network costs; associated benchmark cost, \$43 per elementary pupil and \$56 per secondary pupil
- “professional/para-professional services”: includes staff who provide support services to students and teachers, including computer technicians; associated benchmark cost, \$67 per elementary pupil and \$105 per secondary pupil

As I have noted before, the benchmark costs are based on boards’ actual costs in 1997. Many of those who made presentations and submissions to the task force pointed out that both the need for ICT in elementary and secondary education and advancements in ICT have increased dramatically since 1997. ICT is now an integral part of the curriculum and a key component in students’ ability to achieve success in school.

In acknowledgement of the new and important role of ICT in education, the Ministry of Education and the Ministry of Training, Colleges and Universities created the Ontario Knowledge Network for Learning (OKNL) in the spring of 2000. The OKNL was intended to oversee the development of a vision and plan of action for integrating education and ICT in Ontario. The OKNL has issued reports proposing a direction, but to date the government has taken little action on the OKNL's recommendations. The education community needs direction from the government on the future role it envisages for ICT in the classroom. I therefore urge the ministry to respond to the reports of the OKNL.

I also heard concerns that the funding formula does not pay sufficient attention to the concept of "total cost of ownership" in relation to ICT. "Total cost of ownership," I was told, goes beyond the cost of specific hardware and software; it recognizes a host of factors that are necessary ingredients in the development of successful ICT strategies. For example, presenters suggested that there is a need for funding to train teachers in the effective use of ICT in teaching the curriculum and to hire the technical staff needed to support ICT initiatives.³⁷

At present, the School Board Administration and Governance Grant covers the ICT needs of school board administrators, such as enrolment reports; business, finance, and human resources functions; and the management of physical facilities. Presenters identified the application of ICT to administrative functions as another area that both requires new investments and offers significant opportunities for the effective and efficient management of board resources.³⁸

I support the calls for improvement of ICT systems in the classroom and in board administration. This issue offers the Ministry of Education an opportunity to promote the standardization of classroom ICT systems and to promote the effective and efficient management of board resources.

I recommend that:

32. the Ministry of Education promote standardization, where appropriate, of instructional software and classroom information and communications technology (ICT) systems, and that it work with school boards to promote the effective and efficient management of boards' administrative ICT systems

I wish to note that, while I acknowledge the importance of computers in the classroom and the need to train teachers in their use, I also believe that teaching methodology needs to adapt to truly integrate ICT into instruction and to use ICT in instruction to its fullest advantage.

Governance

In Chapter 3, I set out my views of the roles and responsibilities of the major partners in education. In keeping with those views and in light of the introduction of the student-focused funding formula and the loss of taxing authority by school boards, I believe that there is a need for a thorough review of education governance.

During the course of my review I observed that the introduction of the student-focused funding formula has affected the relationships among the provincial government, school boards, teachers, school councils, and community groups. These relationships need to be clarified. To my mind, the question is whether the governing structure is as effective as it should be to advance the goal of continuous improvement in student learning and achievement. To address this goal, the roles and responsibilities of all partners in education need to be more clearly articulated so that each partner and the public understand them.

I am therefore recommending that the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners.

I recommend that:

33. the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners

5. List of Recommendations and Summary of Estimated Costs

List of Recommendations

In introducing this list of recommendations, I wish to reiterate a point I made at the beginning of Chapter 4. With the exception of recommendations 2, 24, and 29, my recommendations are for measures that, if implemented, would begin to take effect in the 2003–04 school year as part of a multi-year funding plan. By “multi-year funding plan,” I mean over three years. The government may wish to fully implement some measures earlier.

Recommendations 2, 24, and 29 are for, respectively, funding for collective bargaining with teaching and support staff, funding under the Special Education Grant for Intensive Support Amount (ISA) claims that have been approved up to the end of cycle 3 of the ministry’s comprehensive review of ISA funding, and funding for boards’ most pressing needs related to student transportation.

These three recommendations reflect the priorities that I discerned through my consultations and subsequent analysis of the issues. I believe that if these recommendations are implemented in the 2002–03 school year they will foster stability in the education sector.

I recommend that:

1. the Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant) to reflect costs through August 2003, and that funding that reflects these updated benchmark costs be phased in over three years, starting in 2003–04, as part of a multi-year funding plan

I estimate that the updated benchmark costs covering costs through August 2003 will total \$1.08 billion, excluding the additional cost of updating salaries and benefits in 2002–03 (see recommendation 2). The \$1.08 billion estimate comprises updates of benchmark costs to August 2002 (\$1.01 billion) plus updates of non-salary-and-benefit costs to 2003 (\$70 million). The estimated \$1.08 billion should be phased in over three years, starting in 2003–04, as part of a multi-year funding plan.

2. to foster stability in the education sector, the Ministry of Education allocate funds to school boards in the current school year (2002–03) for the current round of collective bargaining with teaching and support staff

3. the Ministry of Education, in consultation with school boards and other members of the education community, develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years
4. the Ministry of Education, in consultation with school boards, other members of the education community, and other appropriate stakeholders, review and consider grouping all of the Special Purpose Grants in the funding formula that have a focus on readiness to learn for preschool children, in-school students, and youth making the transition from school to work/postsecondary education, with the goal of ensuring that these Special Purpose Grants are designed to meet the needs of at-risk children and youth effectively
5. the Ministry of Education determine the appropriate funding magnitude of the Demographic Component of the Learning Opportunities Grant by collecting and analysing data on programs and services for students at risk from a representative sample of school boards that offer effective programs and services of this nature
6. as an interim measure, pending the collection and analysis of the data on programs and services for students at risk described in recommendation 5, the Ministry of Education invest an additional \$50 million in the Demographic Component of the Learning Opportunities Grant, using the current allocation model based on the 1996 census
7. the Ministry of Education review the current allocation models for the Demographic Component of the Learning Opportunities Grant to ensure that the distribution of funds to school boards under this grant is fair and equitable, and further, that the ministry update the socio-economic factors in the formula using 2001 census data
8. beginning in 2003–04, the Ministry of Education reallocate the unused portion of the Grades 7 to 10 Component of the Learning Opportunities Grant (LOG) to the LOG for programs and services for students who need remedial literacy and math programs, and further, that the ministry require school boards, as part of their accountability, to report on how the funds have been used for this purpose
9. the Ministry of Education require school boards that receive funds through the Learning Opportunities Grant to report publicly on how the expenditure of these funds is contributing to continuous improvement in student achievement and to the reduction of the performance gap between high and low achievers in their schools while maintaining high standards
10. the Ministry of Education increase the funds allocated under the Language Grant to reflect five years of language training for English as a Second Language/English Skills Development and for *Perfectionnement du français*

I estimate that the increase to the Language Grant for English as a Second Language/English Skills Development and Perfectionnement du français to reflect five years of language training will cost \$65 million.

11. the Ministry of Education obtain accurate data to establish the extent of school boards' needs related to the provincial role in the education of Aboriginal students and, on the basis of this data, implement a new grant targeted at the educational needs of Aboriginal students who are not living on reserves, and further, that the ministry require boards that are eligible for this grant to spend it on programs and services for Aboriginal students and to publicly account both for the expenditures and the results achieved
12. the Province work with Aboriginal leaders and the federal government to ensure that there is an integrated approach to and adequate funding for the education of Aboriginal students
13. the government establish a Cabinet-level advisory council on integrated services for children and families, composed of representatives from the Ministries of Community, Family, and Children's Services, Education, Health and Long-Term Care, Public Safety and Security, and Tourism and Recreation, to meet on a regular basis to align the work and the funding mechanisms of the ministries that serve families, children, and youth
14. the Ministry of Education review the brief submitted to the task force by the 12 French-language school boards, together with the Association des conseillères et des conseillers des écoles publiques de l'Ontario and the Association franco-ontarienne des conseils scolaires catholiques, and amend the funding formula as appropriate to ensure that each of the grants in the formula recognizes the higher costs experienced by French-language boards in delivering education programs and services
15. the Ministry of Education allocate core-support funding through the Geographic Circumstances Grant to school boards that have decided to keep open a small school in a single-school community and that, under the updated Foundation and Special Purpose Grants (that is, updated as described in recommendation 1), do not have an average school size that is sufficient to generate funding for core-support staff for that small school, and further, that the core-support funding cover the following:
 - a full-time principal and secretary for each elementary and secondary school
 - a full-time support staff person for each elementary and secondary school to ensure a safe, clean, and well-maintained school, and
 - a full-time individual in a secondary school to provide advice on careers and postsecondary education to secondary school students and advice to Grade 8 students on secondary school placements

I estimate that core-support funding for small schools in single-school communities will cost \$50 million.

16. the Ministry of Education extend the duration of the Declining Enrolment Adjustment to three years

I estimate that extending the duration of the Declining Enrolment Adjustment will cost \$5 million.

17. the Ministry of Education reconstitute the Local Priorities Amount as 5% of the Basic Amount of school boards' Foundation Grants (updated as per recommendations 1 and 2), and that boards apply the Local Priorities Amount to locally established priorities, programs, and services aimed at the continuous improvement of student learning and achievement
18. the Ministry of Education require school boards, through their directors of education, to consult with principals and school councils for the purposes of developing a plan for the use of the Local Priorities Amount, and to annually review the plans and report publicly to all stakeholders and to the ministry on the results achieved through the implementation of the plans, in individual schools and in the district as a whole
19. the Ministry of Education make a new strategic investment of \$50 million in the School Renewal Allocation for school boards to use to address their most pressing school renewal needs
20. the Ministry of Education allocate a new strategic investment of \$200 million annually to a "deferred maintenance amortization fund," which would fund the principal and interest costs of school boards' payments to service the debts boards would incur in borrowing funds so that they could begin to address their deferred maintenance needs
21. the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected
22. the Ministry of Education review and consider the recommendations in the brief submitted to the task force by the Minister's Advisory Council on Special Education
23. in the 2003–04 school year, following completion of the comprehensive review of the Intensive Support Amount funding, the Ministry of Education fund school boards for all claims approved during the review
I estimate that the annual cost of funding all approved Intensive Support Amount claims will be approximately \$250 million.
24. to foster stability in the education sector, the Ministry of Education allocate \$130 million to school boards in the current school year (2002–03) to fund all claims approved up to the end of cycle 3 of the comprehensive review of Intensive Support Amount funding
25. the Ministry of Education develop a funding policy for the transportation of students with special needs

26. the Ministry of Education increase the Special Education Per Pupil Amount (SEPPA) for secondary school students to offset the estimated decline in enrolment that will result from the reduced number of years in the secondary school curriculum, and that it then increase the SEPPA by a further 10% to support a high level of special education programs and services at the secondary school level

I estimate that the cost of increasing the SEPPA as described in recommendation 26 will be \$19 million.

27. the Ministry of Education, following a brief period of consultation on its “Proposed Standards for Special Education Programs and Services Common to All Exceptionalities,” publish an approved set of standards and, if necessary, adjust the funding formula to provide school boards with funding to implement the new standards
28. the Ministry of Education complete the development of a Transportation Grant that is based on need, that includes a mechanism for annual reviews and updates of school boards’ student transportation costs, and that recognizes the costs associated with the transportation of students with special needs and the implementation of transportation safety programs
29. to foster stability in the education sector, the Ministry of Education allocate the \$20 million increase in funding for school transportation that was announced in the government’s 2002 budget to school boards in the current school year (2002–03), and that it direct these funds to those boards that are most in need to help them address transportation cost pressures
30. the Ministry of Education consult school boards and other appropriate stakeholders to facilitate a move towards the implementation of a “regional service boards” approach to the delivery of student transportation
31. the Ministry of Education adjust the credit-load factor in the funding formula in light of the new secondary school curriculum
32. the Ministry of Education promote standardization, where appropriate, of instructional software and classroom information and communications technology (ICT) systems, and that it work with school boards to promote the effective and efficient management of boards’ administrative ICT systems
33. the Minister of Education review, in consultation with all education partners, the education governance structure and the roles and responsibilities of each of the partners

Summary of Estimated Costs

The estimated total cost of my recommendations, as far as I am able to calculate it, is \$1.769 billion. This estimate does not include all the costs that may result from my recommendations, for two reasons:

- I am unable to estimate the teaching and support staff salary and benefits costs being negotiated during the current school year (2002–03). These salary and benefits costs will not be known, of course, until the current round of collective bargaining is complete. When they are known, they will have to be added to my estimated total.
- Some of my recommendations ask the Ministry of Education to collect and analyse data and to analyse aspects of the funding formula to ensure that the benchmark factors and costs in the formula are appropriate. If the formula is adjusted as a result, additional costs may be involved.

The table below summarizes the estimated costs of my recommendations. For more detail on my approach to updating the benchmark costs and for more detailed calculations, see Appendices H, I, and J.

Summary of Estimated Costs of the Education Equality Task Force’s Recommendations

Item	Cost (Millions)
Update of all benchmark costs to August 2002	\$1,010
Update of all benchmark costs from August 2002 to August 2003, <i>not including</i> the cost of salaries and benefits being negotiated in 2002–03	70
New investments	689
Total estimated cost of recommendations, <i>not including</i> the cost of salaries and benefits being negotiated in 2002–03	\$1,769

Source: Appendix I, Table I.1.

Notes

Note: The universal resource locators (URLs) for electronic texts that are cited below were accessed during the course of the task force's research, between May and November 2002. Some or all of these electronic texts may be inaccessible after publication of this report, or they may no longer be available at the URLs shown. The task force takes no responsibility for their accessibility.

1. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/eguide02.pdf>>, and Ministry of Education staff.
2. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., 1.
3. Increases to the student-focused funding formula since its inception are described in Appendix H, note 3.
4. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., and Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>.
5. For example, Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service" (2002), <http://www.ncsl.org.uk/index.cfm?pageid=ev_auth_barber>; Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002); and Charles Ungerleider in a book about the future of Canadian public schooling, to be published in Canada by McClelland and Stewart in 2003.
6. Britain and other jurisdictions came to this realization. See Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service," op. cit.
7. In a conversation I had with him, Dr. Charles Ungerleider referred to the optimum benefit as "productive efficiency."
8. Richard F. Elmore, *Bridging the Gap Between Standards and Achievement: The Imperative for Professional Development in Education* (Washington, D.C.: Albert Shanker Institute, 2002), 5.
9. The exception is the Transportation Grant, which is based on an allocation in the old, pre-1998 funding formula. Nonetheless, the costs involved in providing student transportation can be measured and the grant can be adjusted to reflect actual cost. Therefore, when I refer to "updating the benchmark costs of all components of the funding formula," I am including the costs involved in providing student transportation.
10. Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002), 18.
11. For example, Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities* (Toronto: The Founders' Network, 2002). See also the works cited in Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 4.
12. Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities*, op. cit.
13. Quoted by David Crane in "By failing children, we fail ourselves," *Toronto Star* (October 20, 2002).
14. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
15. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 9.
16. The allocation for ALF does not take into account three years of data; rather, it is a calculation based on three factors: basic level of service, an "assimilation" factor, and cost per instructional unit. For more information on both ESL/ESD and ALF/PDF, consult Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 18–22.

17. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
18. See Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 18–22.
19. Canada, Royal Commission on Aboriginal Peoples, “Education,” chap. 5 in *Gathering Strength*, vol. 3 of *Report of the Royal Commission on Aboriginal Peoples* (Ottawa: the Commission, 1996), 433–34.
20. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 6.
21. Because French-language school boards operate in areas where the majority of the population is English-speaking, they struggle constantly against the assimilation of their students into the English-language culture.
22. For the funding formula’s definitions of a small elementary and a small secondary school, see Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 25 (the “Geographic Circumstances Grant”).
- Pages 7–8 of the document (“Foundation Grant”) describe the calculation used to determine the core resources for a school. It shows that the funding formula makes provision for 2.75 principals for every 1,000 elementary students. Thus, to be able to fund one principal, an elementary school must have at least 364 students (1,000 / 2.75). Current information indicates that the average elementary school size is 340 students, and that over 60% of existing elementary schools have fewer than 364 students.
- For secondary schools, the formula provides for 1.1 principals for every 1,000 secondary students, which means that a minimum of 909 pupils (1,000 / 1.1) is needed to obtain funding for one principal. Current information indicates that the average secondary school size is 847 students, and that over 55% of existing secondary schools have fewer than 909 students.
23. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
24. The Ministry of Education’s technical document on the Pupil Accommodation Grant notes that “In 1998, detailed information on each school in Ontario was compiled through the School Facilities Inventory System and used to determine the capacity of each board’s elementary and secondary schools on a consistent basis across the province.” This “rated” capacity can be adjusted in certain circumstances, such as when a board sells a school. In 2001–02 the formula was changed to allow boards that would not normally qualify for new pupil places to be eligible to receive funding to address “significant and persistent enrolment pressures at specific schools.” Ontario, Ministry of Education, “Student-Focused Funding: Pupil Accommodation Grants 2002-2003” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203pupilacc.pdf>>, 3–5.
25. The limits on boards’ spending flexibility are described in Chapter 2 of this report.
26. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
27. Examples include the Society for College and University Planning, the American Public Works Association, and the Canadian Association of University Business Officers. See also Toronto District School Board, *Facility Review and Assessment, Executive Summary* (Toronto: the Board, 2002), which contains information about cyclical renewal costs.
28. The \$266 million figure was arrived at as follows: The original allocation for the 2002–03 year was \$241 million. In its May 2002 budget, the government announced an additional \$25 million for school renewal, which the Ministry of Education has now added to the \$241 million, for a total of \$266 million.
29. The ministry’s initiative to assess school renewal needs will generate sufficient information to calculate a Facilities Condition Index (FCI) for each school, each board, and the public education system as a whole. An FCI is the estimated maintenance renewal costs divided by the capital replacement value of a school. For example, if a school’s replacement value is \$10 million and it has an estimated maintenance renewal cost of \$1.5 million, the FCI would be 0.15.
30. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

31. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
32. The Special Education Per Pupil Allocation is provided on the basis of a sliding scale, with lower levels for secondary school students. For more information, see Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 13.
33. The ISA Working Group was established by the ministry. It comprises representatives of the Minister’s Advisory Council on Special Education, trustee associations, supervisory officer associations, senior business officials, and parent groups.
34. Ontario, Office of the Provincial Auditor of Ontario, “2001 Annual Report” (2001) <<http://www.gov.on.ca/opa/English/ro1t.htm>>, 126–27.
35. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
36. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
37. The website of the U.S.-based Consortium for School Networking (CoSN), <<http://www.cosn.org>>, offers information on a variety of topics related to information and communications technology, including the concept of total cost of ownership.
38. The 2002 Ontario Provincial Budget committed \$17 million over two years to the assessment of school renewal needs (the initiative referred to earlier in this chapter and in note 29, above). These funds will be used for, among other things, the acquisition of standard asset management software for each board.

Appendix A: Task Force Chair and Expert Advisers

Head of the Education Equality Task Force

Dr. Mordechai Rozanski has been president of the University of Guelph since 1993. He is its longest serving president and a professor in the department of history. Dr. Rozanski is also chair of the Council of Ontario Universities. He holds a bachelor of arts in history from McGill University and a doctorate in Chinese history from the University of Pennsylvania. As well, Dr. Rozanski has been a Canada Council Fellow at New Asia College in Hong Kong, a Lily Fellow at Stanford University, and an American Historical Association Fellow at Columbia University.

Expert Advisers

Lynn Beyak is a small business owner from north-western Ontario. Active in education since 1982, she is a former chair of the Ontario Parent Council, trustee and vice-chair of the Fort Frances Rainy River Board of Education, delegate for the West Rainy River District Home and School Association, and parent volunteer. She is an ambassador for Ontario's Promise for Children and Youth and an active community volunteer. Ms. Beyak retired as a trustee in 1997.

Brian Cain, a certified management accountant and school business official for 32 years, served as the superintendent of business for the former Grey and Durham Boards of Education and as executive officer of business services for the North York Board of Education and the Toronto District School Board. Mr. Cain retired in 2001.

Mariette Carrier-Fraser served in Ontario's education system for more than 36 years. She taught school in both northern and southern Ontario communities, became principal of a French-language school, and then joined the Ministry of Education

as a regional superintendent for French-language schools. In her provincial government career, Ms. Carrier-Fraser was assistant deputy minister for French-language education in both the Ministry of Education and the Ministry of Colleges and Universities, and assistant deputy minister of elementary, secondary, and postsecondary operations and of French-language education in the Ministry of Education. She retired in 1997.

Patrick Slack held a variety of positions during 42 years in the Ontario education system. He served as a teacher, vice-principal, and principal at both the elementary and secondary levels. He was also superintendent of the Frontenac-Lennox and Addington Roman Catholic Separate School Board and executive director of the Ontario Catholic School Trustees' Association. Mr. Slack has also served with the Ontario Teachers' Federation, the Leeds and Grenville Board of Education, the Eastern Ontario Secondary School Principals' Council, and the provincial committee for new Catholic supervisory officers. He retired in 2001.

Ann Vanstone was a trustee and chair of both the Toronto Board of Education and the Metropolitan Toronto School Board. During that time, she was also a member of the Working Group on Education Finance Reform. In 1997, she retired from the Metro board and was appointed co-chair of the Education Improvement Commission, which oversaw the amalgamation of Ontario's English-language school boards and the establishment of the French-language school board system in the province. In 2001, Ms. Vanstone served as co-chair of the Task Force on Effective Schools.

Appendix B: Stakeholder Advisory Committee

Organization	Representative
Association des agentes et agents de supervision franco-ontariens	Roland Montpellier
Association des conseillères et des conseillers des écoles publiques de l'Ontario	Yvon Ferrand
Association des directions et des directions adjointes des écoles franco-ontariennes	Serge Plouffe
Association des enseignantes et des enseignants franco-ontariens	Bernard Éthier
Association franco-ontarienne des conseils scolaires catholiques	Robert Gagné
Canadian Union of Public Employees – Ontario Region	Linda Jewett
Catholic Principals' Council of Ontario	Nelly Kelders
Conseil ontarien des directrices et des directeurs de l'éducation de langue française	Marc Dionne
Council of Ontario Directors of Education	Michel Serré
Council of Senior Business Officials	John Sabo
Elementary Teachers' Federation of Ontario	Barbara Richter
Fédération de la jeunesse franco-ontarienne	Noémi Paquette
Minister's Advisory Council on Special Education	Lynn Ziraldo
Ontario Association of Parents in Catholic Education	Mary Ann Cuderman
Ontario Association of School Business Officials	Don Higgins
Ontario Catholic School Business Officials' Association	David Visser
Ontario Catholic School Trustees' Association	Pat Daly
Ontario Catholic Student Council Federation	John-Paul Rodrigues
Ontario Catholic Supervisory Officers' Association	Roger Lawyer
Ontario English Catholic Teachers' Association	Donna Marie Kennedy
Ontario Federation of Home and School Associations	Lesley Schuurs
Ontario Parent Council	Irene Murray
Ontario Principals' Council	Helen Spence
Ontario Public School Boards' Association	Gerri Gershon
Ontario Public Supervisory Officials' Association	Wayne McNally
Ontario Secondary School Students' Association	Kara Lilly
Ontario Secondary School Teachers' Federation	Dale Leckie
Ontario Student Trustees' Association – Association des élèves conseillères et conseillers de l'Ontario	William Wong

Organization	Representative
Ontario Teachers' Federation	Susan Langley
Parents partenaires en éducation	Ghislaine Pilon
People for Education	Annie Kidder

Appendix C: Discussion Points to Frame the Research and Consultation Process

The following information was contained in a discussion paper posted on the task force website and distributed to members of the Stakeholders Advisory Committee and other participants in the consultation process.

In determining whether the current funding approach meets its original objectives, the task force will consider questions that relate to the achievement of these five principles. The questions raised in this guide are designed to prompt discussion. However, discussion does not need to be limited to these questions; nor need the recommendations only reflect the answers to these questions. Your input is needed to develop effective and practical recommendations. All aspects of the funding formula are open to discussion.

Quality of Student Learning and Achievement

The review of the student-focused approach to education funding recognizes that the funding formula is not an end in itself. The purpose of the funding formula is to serve as an instrument to ensure that all Ontario's schools have the appropriate resources to advance the highest quality of student learning and achievement. In this regard, the student-focused funding mechanism should reflect relevance, stability, and efficiency in the structure of cost benchmarks.

The Education Equality Task Force is considering questions such as:

- What core programs and services are essential to your definition of a quality education?
- How effective is the current funding approach in providing appropriate and stable support to these programs and services, including personnel costs, transportation, English as a second

language, special education, and continuing education, among others? In other words, does per pupil funding reflect the cost of per pupil programs and services needed to achieve a quality educational experience?

- Should boards have some access to local revenue, in an equitable fashion, to deal with discretionary programs and services beyond the education programs and services covered by student-focused funding?

Equity and Fairness

One of the key objectives of student-focused funding is to ensure that all students have access to a quality education. Some of the questions that arise are:

- How effective is the funding mechanism in responding to different needs of students and different needs of school boards in urban, northern, and rural areas; among small and large urban boards; and among public, Catholic, French-, and English-language school boards?
- Are there differences among school board costs that require funding to be more responsive?

Responsiveness to Local Needs

As indicated in the discussion of equity and fairness above, there is a great diversity in Ontario that affects learning opportunities and costs. A system that responds to local needs and preferences will encourage local participation and accountability. Areas of focus include:

Student Transportation

The Transportation Grant model predates the benchmark-based funding formula. The Ministry of Education has been working with school boards

and transportation providers to revise the transportation component of the funding formula.

- What elements should be included in a new model?
- Would incentives be appropriate and effective to encourage boards to form partnerships to deliver transportation services?

Special Education

These needs vary from student to student and board to board. Individual boards therefore offer a range of programs to meet student needs. To improve the match between board funding and student needs, the government has undertaken a review of Intensive Support Amount funding to inform decisions about the Special Education Grant for 2003–04. In this regard:

- How should the government assess boards' needs for funding to support special education programs and services?
- How can funding be distributed in a way that is both responsive to students' needs for services and administratively efficient?
- What approach to special education funding would be effective in balancing demonstrated need and efficiency?

School Renewal

The Pupil Accommodation Grant includes a School Renewal component to finance the cost of repairs and renovations. All boards receive grants for school renewal. The grant is based on data reported by school boards in 1997.

- Has the grant for School Renewal effectively provided funding for repairs and renovations?
- How frequently should the data for the School Renewal grant be updated?
- Are the criteria currently included in the Pupil Accommodation Grant comprehensive enough to address issues of school repair and maintenance?
- How can new pupil places be dealt with in a fair and equitable manner?

Accountability

The education system must be accountable to students, parents, and taxpayers for the resources it uses and the results it produces. A number of mechanisms were introduced to promote accountability, such as the “enveloped spending” provisions, which require school boards to direct funding toward specific expenditure categories. Some of the questions that arise are:

- How effective are the current accountability parameters such as reporting requirements, legislative parameters, etc., in improving learning outcomes?
- Is reporting of expenditures sufficiently transparent?
- How effective are current funding envelope requirements at providing appropriate support to specific programs and services?
- Should the government give boards the flexibility to remove or restructure expenditure envelopes?
- Should the Local Priorities Amount (introduced in 2001–02) be expanded to give boards increased flexibility to provide for local discretionary programs?
- Are there other changes that should be considered to provide boards with a more appropriate level of flexibility?
- If the government provided boards with multi-year funding, would that give boards greater flexibility and improve their planning processes?

Affordability

The cost of education in Ontario, like the quality of education, should be comparable with the most effective school systems in other jurisdictions.

Under student-focused funding, school boards' revenues are largely driven by enrolment, and both operating and capital revenues are determined by formulas that include provincial cost benchmarks.

The government has introduced annual refinements to the funding model to address cost pressures and to implement policy changes. The Local Priorities Amount, first created in 2001–02, will allocate \$400 million to school boards in 2002–03 in proportion to their share of the total enrolment. This funding is flexible, and can be used by boards to address local priorities, including cost pressures.

The cost benchmark for salaries of teachers and most other board staff was increased by 1.95% in 2000–2001. All other cost benchmarks are currently at 1997 levels.

- What is the best approach to recognize increased costs, while continuing to give boards incentives to use resources efficiently?

- Student-focused funding determines each board's allocation without regard to the source of revenue. Should this approach be maintained, or should boards have access to other sources of revenue to increase their flexibility?
- How can cost benchmarks be kept updated?
- How can stability in funding be sustained to assist planning?
- Are there alternative approaches to bargaining that would achieve fairness while promoting greater stability and improved budgeting?

Appendix D: Components of the Student-Focused Funding Formula

The following descriptions of the grants and their components are based on information contained in the Ministry of Education documents *Student-Focused Funding: Parents Guide, 2002–03*, Spring 2002, and *Student-Focused Funding: Technical Paper, 2002–03*, Spring 2002. Consult these two papers, available on the Ministry of Education website, at www.edu.gov.on.ca, for more detailed information, as well as for the amounts of the grants for the 2002-03 school year.

Foundation Grant

The Foundation Grant is intended to cover the components of a classroom education that are required by, and common to, all students. It allocates the same amount per student to all school boards and is based on a board's average daily enrolment, calculated twice yearly, in October and in March.

The classroom components covered are as follows:

- classroom teachers
- supply teachers
- staff development
- teaching assistants
- textbooks and learning materials
- classroom supplies
- classroom computers
- library and guidance services
- professional and para-professional supports (for example, social workers or computer technicians)
- teachers' preparation time
- in-school administration (including principals, vice-principals, department heads, and school secretaries)

- classroom consultants (for example, teachers who are reading specialists or who help other teachers develop and implement curriculum)

The Foundation Grant also includes a Local Priorities Amount, which school boards have the flexibility to use to meet their local needs.

Special Purpose Grants

In addition to the Foundation Grant, all school boards receive Special Purpose Grants. These grants provide extra funding to meet additional student needs, which may vary from one student to another, that are not covered by the Foundation Grant, and additional board costs, which may vary from one board to another.

Special Education Grant

The Special Education Grant provides boards with funding to serve students with special needs. Boards have the flexibility to determine how they will use their Special Education Grant – for example, to pay for special education teachers, teaching assistants, and other professionals such as psychologists or speech/language therapists – but they may only use it for special education purposes. Any unspent portion must be placed in a special education reserve fund.

The Special Education Grant has two major components:

- The **Special Education Per Pupil Amount (SEPPA)** is based on the total number of students the board serves, not just on those students who have been identified as needing a special education program. This funding acknowledges that a certain portion of any student population will have special needs. It is

intended to fund the special programs and services these students need without requiring boards to take the time and incur the costs of formally identifying these students as “exceptional.” (Under the Education Act, school boards are required to identify students who are “exceptional” – that is, those who have a high level of special needs. The definition of an “exceptional pupil” and the identification process are spelled out in the Act and regulations.)

- The **Intensive Support Amount (ISA)** is allocated to boards on the basis of their “incidence rate” of students with intense needs who require such costly supports as special equipment, teachers, and teaching assistants. Each year, boards submit claims to the Ministry of Education for the ISA funding they believe they need. The ISA is based on the ministry’s review of these claims.

In the 2001–02 school year, the ministry began a comprehensive review of ISA funding.

Boards are expected to combine the funding they receive from the Foundation Grant, other Special Purpose Grants, SEPPA, and ISA to provide students with special needs with the individual programs and services they require.

There are two other components to the Special Education Grant:

- The **Special Incidence Portion (SIP)**: This component is for programs and services for students with exceptionally high needs. SIP funding is based on the Ministry of Education’s review of boards’ SIP claims.
- **Funding for Programs in Correctional, Care, and Treatment Facilities**: This component relates to education programs provided by school boards for children and youth in various local facilities and institutions, including hospitals, children’s mental health centres, psychiatric institutions, detention and correctional facilities, community living/group homes, and other social services agencies.

One of the specific questions I was asked to address is whether the current approach to funding special education is the most responsive way to meet students’ needs.

Language Grant

The Language Grant provides funding to meet boards’ costs for language instruction. Every board receives a Language Grant, but the level of funding varies, depending on each board’s needs in this area.

For English-language boards, the Language Grant provides funding for core French, extended French, and French immersion programs. It also provides funding for English-as-a-second-language/English skills development (ESL/ESD) programs for students who have come to Canada from countries where English is not a first or standard language, and for Canadian-born students whose language spoken at home is not English.

For French-language school boards, the Language Grant recognizes the higher costs of French-language learning materials and other aspects of French-language education. It also provides funding for *Actualisation linguistique en français* and *Perfectionnement du français*, programs designed to help students who are entitled to attend French-language schools but who have limited or no competency in French, and students who speak a variety of French that is different from standard French. The grant also offers some additional funding for boards situated in areas of the province where French-speaking people are in a minority and the English language predominates, to help these boards maintain a French-language learning environment and the cultural values they are striving to provide for their students.

In addition, the Language Grant provides funding for Native-language programs where offered by boards.

Geographic Circumstances Grant

The Geographic Circumstances Grant is provided only to those boards that meet certain geographic criteria. It comprises the following three allocations:

- The **Small Schools Allocation** is intended to offset the higher per student cost of programs in small schools. Small elementary schools are defined as schools that have fewer than an average of 20 students per grade and that are located 8 or more kilometres from other elementary schools of the board. Small secondary schools are defined as schools that have fewer than an average of 120 students per grade and that are located 32 kilometres from other secondary schools of the board.

This allocation contains a component for additional principals in boards that have a high proportion of small schools. Often such boards provide their small schools with part-time principals. Eligible boards may use this funding to provide more principals or to increase the amount of time part-time principals can spend on their principal duties.
- The **Remote and Rural Allocation** provides additional funding to meet the higher cost of goods and services experienced by boards that are remote from major urban centres, with students who are spread over a large area. Funding is calculated by measuring three factors: enrolment in the board's schools, distance from an urban centre, and the distance between schools and between schools and the board's central office.
- The **School Authorities Allocation** is reserved for school authorities, which are small school boards located in remote areas of Ontario and in some children's hospitals. The per student costs of school authorities are generally higher than those of other boards. The Ministry of Education uses a modified version of the student-focused funding model to calculate this allocation.

Learning Opportunities Grant

The Learning Opportunities Grant includes three components:

- The **Demographic Component** permits boards to offer a wide range of programs to improve the achievement levels of students who are at risk of performing poorly in school. Boards have the flexibility to select programs that respond to local needs.

To calculate this component, the Ministry of Education uses the following social and economic indicators, which research shows are associated with students at risk:
 - low family income
 - low parental education
 - lone parent status
 - Aboriginal status
 - recent immigration status
- The **Early Literacy Component** is aimed at improving the literacy of students in Junior Kindergarten (JK) to Grade 3. Funding is allocated on the basis of each board's share of average daily enrolment in JK to Grade 3. Boards are required to focus these resources on students with the greatest need – those whose reading readiness assessments show that they need remedial help and those who are achieving at level 1 or lower. (The Ministry of Education has established four levels of achievement for the Ontario Curriculum, with level 1 being the lowest.)
- The **Literacy and Math for Grades 7 to 10 Component** allows boards to offer additional support to enhance the literacy and math skills of Grades 7 to 10 students who are at risk of not meeting curriculum standards and the requirements of the Grade 10 literacy test. These courses or programs may be provided during the summer and during the school year outside of the regular school day. Funding is provided at a rate that is intended to support the average cost of providing a continuing education teacher for a class of 10 students. Funding is also provided for transportation of students in summer programs.

In addition, funding for school operations and school renewal under the Pupil Accommodation Grant is provided to boards that have students in Grades 7 to 10 literacy and math summer school programs, to offset the extra costs of operating schools during the summer.

Continuing Education and Other Programs Grant

The Continuing Education and Other Programs Grant provides funding for adult day-school programs, continuing education programs, and correspondence/self-study programs for adult students, including summer school programs for adults. It also funds summer school and night school courses for high school students who are upgrading, making up courses, or fast-tracking (usually in order to transfer between applied and academic streams in secondary school).

The grant also provides funding for international language (heritage language) studies for elementary school students, calculated on the basis of the number of hours of classroom instruction and the size of the classes.

Teacher Qualifications and Experience Grant

The Teacher Qualifications and Experience Grant provides funding to help boards meet teachers' salary costs that rise above the funding provided by the Foundation Grant. Teachers are paid according to their qualifications and experience. Because boards have different proportions of teachers with high levels of qualifications and experience, boards' salary costs vary. This grant acknowledges that some boards have higher salary costs for teachers.

The grant includes funding to meet the additional costs for teachers in boards whose secondary students take, on average, more than 7.2 credits per year. (The Foundation Grant provides funding for a typical student course load of 7.2 credits.) In the past few years, with the implementation of changes to the secondary school curriculum and the planned elimination in 2003 of the Ontario Academic Credit, many students have been taking additional credits.

Boards have needed to hire more teachers to accommodate the higher course loads taken by students, and many boards' salary costs have therefore been higher than those envisaged by the Foundation Grant.

Early Learning Grant

The Early Learning Grant provides funding to school boards that do not offer Junior Kindergarten (JK) at all or do not offer it everywhere in their jurisdictions. It is intended to help these boards provide programs that are similar or equivalent to JK to improve the learning achievement of their young students. (Boards that offer JK throughout their districts receive funding for JK through the Foundation Grant and other grants.)

Transportation Grant

The Transportation Grant, which is under review by the Ministry of Education, provides funding to school boards for the transportation of students. The grant was increased in 2002–03 to assist boards until a new approach is developed and implemented. The ministry encourages boards to provide transportation services to their students in co-operation with other boards and to implement other student transportation efficiencies.

In my mandate, I was specifically asked to consider the ministry's approach to funding student transportation, including ways to maximize opportunities for shared busing services between school boards that serve the same communities.

Declining Enrolment Adjustment

The Declining Enrolment Adjustment was added to the funding model in the current year (2002–03), in response to recommendations made by a stakeholder working group, to help boards with declining enrolment.

Because much of the funding boards receive is determined by enrolment, boards with declining enrolment lose revenue. In general, this is appropriate because, with fewer students, boards can reduce the number of teachers and support mechanisms they need. Some costs can be reduced easily.

For example, the number of classroom teachers can be reduced by rearranging classes to adjust to a reduction in enrolment. Other costs cannot be reduced easily. For example, reduced enrolment does not necessarily mean that a school can get by with fewer secretaries or that its heating and lighting costs will decline.

The province's overall rate of enrolment growth is slowing. As a result, the issue of declining enrolment will become more important over the next few years.

The present adjustment gives boards with declining enrolment two years to bring their costs in line with their reduced enrolment.

Administration and Governance Grant

The Administration and Governance Grant provides funding for the governing of school boards, including trustees' honoraria and expenses, the funding of school councils, and the administrative costs of operating board offices, including the salaries of directors of education and supervisory officers. Trustees' honoraria are set at \$5,000 per trustee (except for student trustees), and chairs and vice-chairs get an additional \$10,000. Under this grant, all boards receive a base level of funding and additional funds that are determined by their number of trustees and students. Boards that receive funding under the Remote and Rural Allocation, the Demographic Component of the Learning Opportunities Grant (both discussed above), and the New Pupil Places Allocation of the Pupil Accommodation Grant (discussed below) also receive increased funding for board administration and governance.

Pupil Accommodation Grant

The Pupil Accommodation Grant is intended to help school boards meet the costs of operating and maintaining their schools and, where warranted, provide new classroom accommodation. The grant has four main components:

School Operations Allocation

The School Operations Allocation provides funding for heating, lighting, cleaning, and other routine maintenance of schools.

School Renewal Allocation

The School Renewal Allocation provides funding for the renovation and repair of schools.

New Pupil Places Allocation

The New Pupil Places Allocation provides funding for new schools or additions where boards are using all their existing school buildings effectively and cannot accommodate growth in student enrolment without new buildings or additions. The allocation provides funding at the level a board requires to finance construction costs over 25 years. The amount is also affected by a geographic adjustment factor, which acknowledges and responds to the varying cost of construction in different parts of Ontario.

All boards receive funding under the School Operations and School Renewal components. However, only those boards that are eligible for the New Pupil Places allocation receive funding under it.

Prior Capital Commitments Allocation

The Ministry of Education maintains a Prior Capital Commitment fund to help boards finance the cost of capital projects that were approved before the student-focused funding formula was in place.

Each of these allocations is calculated on the basis of enrolment, benchmark area requirements, and benchmark costs.

Appendix E: Participants in Roundtable Discussions

All roundtable discussions were held in Toronto.

Trustees, August 13, 2002

Association des conseillères et des conseillers des écoles publiques de l'Ontario (ACÉPO)

Gilles Arpin

Member; Trustee, Conseil scolaire de district du Centre Sud-Ouest

Yvon Ferrand

President; Trustee, Conseil des écoles publiques de l'Est de l'Ontario

Louise Pinet

Executive Director

Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)

Joseph Bisnaire

President; Trustee, Conseil scolaire de district des écoles catholiques du Sud-Ouest

Robert Gagné

Executive Director

Rhéal Perron

Member; Trustee, Conseil scolaire de district catholique Franco-Nord

Ontario Catholic School Trustees' Association (OCSTA)

Elizabeth Crowe

Director, Region 9; Trustee, York Catholic District School Board

Louise Ervin

President; Trustee, Waterloo Catholic District School Board

Bob Schreader

Director, Region 11; Trustee, Renfrew County Catholic District School Board

Paul Whitehead

Vice-President; Trustee, London District Catholic School Board (DSB 38)

Ontario Public School Boards' Association (OPSBA)

Gerri Gershon

President; Trustee, Toronto District School Board

Joan Hodge

Second Vice-President; Chair, Upper Canada District School Board

Rick Johnson

First Vice-President; Chair, Trillium Lakelands District School Board

Camille Quenneville

Director of Policy Development

Liz Sandals

Past-President; Trustee, Upper Grand District School Board

Board Administrators, August 14, 2002

Conseil ontarien des directrices et des directeurs de l'éducation de langue française (CODELF)

Jean-Luc Bernard

Member; Director of Education, Conseil scolaire de district du Centre Sud-Ouest

Hélène C. Chayer

Member; Director of Education, Conseil scolaire de district catholique du Nouvel-Ontario

Marc P. Godbout

Member; Director of Education, Conseil des écoles catholiques de langue française du Centre-Est de l'Ontario

Council of Ontario Directors of Education (CODE)

Kevin Kobus

Member; Director of Education, Simcoe Muskoka Catholic District School Board

Council of Senior Business Officials (COSBO)

Marilyn Marklevitz

Co-Chair; Superintendent of Finance, Waterloo Region District School Board

English as a Second Language/English Literacy Development Resource Group of Ontario (ERGO)

Jill Maar

Consultant, York Region District School Board

Ontario Association of School Business Officials (OASBO)

Ed Hodgins
Member; Superintendent of Business, Trillium
Lakelands District School Board

Ontario Catholic School Business Officials' Association (OCSBOA)

Bob Boucher
Member; Acting Director of Education, Sudbury
Catholic District School Board

Ontario Catholic Supervisory Officers' Association (OCSOA)

Carol-Lynne Oldale
Member; Director of Education, Thunder Bay
Catholic District School Board

Gerry Thuss
Member; Superintendent of Business, Huron-Perth
Catholic District School Board

Ontario Public Supervisory Officials' Association (OPSOA)

Larry Langdon
President-Elect; Director of Education, Hastings
and Prince Edward District School Board

Parents, August 15, 2002

Children and Youth at Risk Advisory Committee

Linda Hunter
Chair

Ontario Association of Parents in Catholic Education (OAPCE)

Maire Bracken
President

Claire Budziak
Region 5 Vice President

Mary Ann Cuderman
Executive Director

Ontario Federation of Home and School Associations (OFHSA)

Judy Watson
Past President

Brian Peat
Member

Ontario Parent Council (OPC)

Trudy Griffiths
Chair

Donald Hill
Parent Member

Bonnie LaFontaine
School Council Representative

Michael O'Gorman
Parent Member

Dale Thomson
Parent Member

Ottawa-Carleton Assembly of School Councils

Lamar Mason
Member

People for Education

Cathy Dandy
Member of Toronto Parent Network

Cathy Gazzola
Member of Hamilton-Wentworth Assembly of
School Councils

John Hoffman
Board Member

Brenda Hopkins
Chair of Thames Valley Regional Association of
School Councils

Taxpayers, August 16, 2002

Ontario Association of Parents in Catholic Education (OAPCE)

Mary Ann Tantulo
Member

Maureen Nolasco
Member

Ontario Chamber of Commerce (OCC)

Ian Cunningham
Senior Vice President, Chamber Relations and
Administration

Bob Hinrichs
Member

Ontario School Bus Association

Richard Donaldson
Executive Director

Ottawa-Carleton Catholic District School Board

Cathy Urban
Ratepayer

Ottawa-Carleton District School Board

Nicole Dufresne-Baker
Chair, Education Task Force, Greater Ottawa
Chamber of Commerce

Supporting Public Access to Community Space Everywhere (SPACE)

Louise Fast

Co-Commissioner, Girl Guides of Canada, Toronto Region

Susan Fletcher

Executive Director, Applegrove Community Complex, Toronto

David Rew

Executive Director, Boys and Girls Clubs of Ontario

Students, August 19, 2002

Dufferin-Peel Catholic District School Board

Patricia Dantas

Student Representative

Teresa Racco

Student Trustee

Ontario Secondary School Students' Association (OSSSA)

Drew Evans

Regional President

Margaret Leung

Provincial Corporate Affairs

Kara Lilly

Student Premier

Marlena Rogosvski

Minister of Provincial Resources

Ontario Student Trustees' Association/ L'Association des élèves conseillers et conseillères de l'Ontario (OSTA/AECO)

Angie Jonsson

First Vice-President

Melissa Ann Retty

President

Karl Baldauf

Former President and founder

Ottawa-Carleton Catholic District School Board

Trevor Arnason

Student Trustee

Ottawa-Carleton District School Board

Kyle Marsh

Student Trustee

Michael Sornberger

Student Trustee

Peel District School Board

Ashleigh Egerton

Student Trustee

Toronto District School Board

Janelle Khan

Student Trustee

William Wong

Student Trustee

Urban School Boards, August 22, 2002

Dufferin-Peel Catholic District School Board

Michael Bator

Director of Education

Durham District School Board

Ron Trbovich

Superintendent of Education, Business Department, and Treasurer

Grant Yeo

Director of Education

Hamilton-Wentworth Catholic District School Board

Tony Davidson

Superintendent of Finance

Ottawa-Carleton Catholic District School Board

Thérèse Maloney Cousineau

Chair

Philip A. Rocco

Director of Education and Secretary-Treasurer

Ottawa-Carleton District School Board

Jim Libbey

Chair

Ron Lynch

Interim Director of Education

Peel District School Board

Lori Foote

President, Ontario Secondary School Teachers' Federation, District 19

Sue Lawton

Chair, Glenforest Secondary School Council

Toronto Catholic District School Board

Joseph Carnevale

Chair

Tom Donovan

Director of Education

Toronto District School Board

Donna Cansfield
Chair

Don Higgins
Superintendent of Business

Shelley Laskin
Trustee

York Region District School Board

Bill Crothers
Chair

Bruce Richardson
Associate Director of Education

**Special Education Organizations,
August 26, 2002**

Community Living Ontario

Marilyn Dolmage
Member

Ann Smith
Member

Learning Disabilities Association of Ontario

Carol Yaworski
Executive Director

Learning Opportunities Task Force

Eva Nichols
Consultant to the Chair

**Minister's Advisory Council on Special
Education (MACSE)**

James Arthur
Member; Representative, Emotional/Behavioural
Disorders, Catholic Community

Jean-Luc Bernard
Vice-Chair, Supervisory Officers, French-Language
Community

Suzanne Earle
Member; Representative, Council for Exceptional
Children and Ontario Council of Administrators in
Special Education

Michelle Forge
Member; Superintendent, Student Services,
Bluewater District School Board

Patricia Jamieson
Member; Representative, Ontario Council for
Children with Behaviour Disorders

Suzanne Lacourcière-McLean
Member; Representative, Autism Society

Sheila McWatters
Member; Dufferin-Peel Catholic District School
Board; Ontario Catholic Supervisory Officers'
Association

Carol Ann Sloat
Member; Representative, Association for Bright
Children

Diane Vandenbossche
Member; President-Elect, Ontario Council of
Exceptional Children

Lynn Ziraldo
Chair; Representative, Learning Disabilities (all
exceptionalities)

**Ontario Association of Speech-Language
Pathologists and Audiologists**

Susan Menary
Member

Ontario Psychological Association

Dr. Maria Kokai
Member

Teachers, August 27, 2002

**Association des enseignantes et des
enseignants franco-ontariens (AEFO)**

Bernard Éthier
Assistant Executive Director

Bluewater District School Board

Nancy Lawler Miller
Teacher

**Elementary Teachers' Federation of Ontario
(ETFO)**

Wambui Gaithu
Member; Toronto District School Board

Velma Liut
Member; Algoma District School Board

Janet Thompson
Member; Thames Valley District School Board

**Ontario English Catholic Teachers'
Association (OECTA)**

Jeff Heximer
Department Head

Donna Marie Kennedy
First Vice-President

Elaine MacNeil
Second Vice-President

Ontario Modern Language Teachers' Association (OMLTA)

Peter David
Treasurer

Christine Roberts
Member

Ontario Secondary School Teachers' Federation (OSSTF)

Karl Dean
District 9, President

Susan Rab
District 25, Vice-President

Ontario Teachers' Federation (OTF)

Ruth Baumann
Executive Assistant

Kathleen Devlin
Executive Assistant

Ottawa-Carleton District School Board

Dave Wildman
Teacher

Toronto District School Board

Elizabeth Papadopoulous
Teacher

Rural School Boards, August 28, 2002

Algoma District School Board

Ray DeRosario
Director of Education

Russell Reid
Chair

Avon Maitland District School Board

Dr. Lorne Rachlis
Director of Education

Grand Erie District School Board

Oscar Van De Walle
Citizen

Hastings and Prince Edward District School Board

Judy Edgar
Chair

Dave Rutherford
Superintendent of Finance

Huron-Perth Catholic District School Board

Gaetan Blanchette
Director of Education

Bernard Murray
Trustee

Huron-Superior Catholic District School Board

Art Callegari
System Administrator

Tim Holmes
Superintendent of Business

Kenora Catholic District School Board

Dr. Al Craig
Director of Education

Lakehead District School Board

Marilyn Gouthro
Director of Education

Steve Parfeniuk
Superintendent of Corporate Services

Nipissing-Parry Sound Catholic District School Board

Grace Barnhardt
Senior Business Officer

Rainy River District School Board

Warren Hoshizaki
Director of Education

Renfrew County Catholic District School Board

Dave Howard
Chair

Renfrew County District School Board

Peter Hamilton
Vice-Chair

School Authorities

Mike Lewis
Supervisory Officer; Caramat, Connell and Ponsford and Mine Centre District School Authorities

Superior-Greenstone District School Board

Bruce Rousseau
Superintendent of Business

Heather Wilson-Boast
Director of Education

Superior North Catholic District School Board

Scott Adams
Manager of Finance

Support Staff, August 29, 2002

Canadian Union of Public Employees (CUPE)

Anne Cowan
Secretary, Toronto District School Board

Donna Carlaw
Secretary, Kawartha Pine Ridge District School Board

David Chezzi
Custodial services, Sudbury Catholic District School Board

Rob Cullens
Busing, Rainbow District School Board

Michael Hennessy
Maintenance, Toronto District School Board

Dean MacDonald
Professional support, Kawartha Pine Ridge District School Board

Helen Manning
Music Instructor, Toronto District School Board

Charlotte Monardo
Child and Youth Worker, Kawartha Pine Ridge District School Board

Terri Preston
English-as-a-Second-Language Instructor, Toronto District School Board

Wendy Shieman
Educational Assistant, Ottawa-Carleton Catholic District School Board

John Weatherup
Heritage languages, Toronto District School Board

Ontario Secondary School Teachers' Federation (OSSTF)

Jack Jones
Custodial services, Ottawa-Carleton District School Board

Cheryl Nicolls-Jones
Educational Assistant, Simcoe Muskoka Catholic District School Board

Donna Thompson
Office/Clerical support, Rainbow District School Board

Principals, August 30, 2002

Association des directions et des directions adjointes des écoles franco-ontariennes (ADFO)

Roger Gauthier
Member, Board of Directors; Conseil scolaire de district catholique des Grandes Rivières

Hélène Levesque
Treasurer; Conseil scolaire de district du Centre Sud-Ouest

Denis Malette
Member, Board of Directors; Conseil scolaire de district catholique des Aurores boréales

Serge Plouffe
Chair

Catholic Principals' Council of Ontario (CPCO)

Michael Courchesne
Member; Nipissing-Parry Sound Catholic District School Board

Dr. Patricia Frankie-Deverell
Member; Dufferin-Peel Catholic District School Board

Nelly Kelders
President

Patrick Mulvihill
Member; Algonquin and Lakeshore Catholic District School Board

Richard Presse
Member; Simcoe Muskoka Catholic District School Board

Lou Rocha
Executive Director

Ontario Principals' Council (OPC)

Michael Benson
Executive Director

Ian Mcfarlane
Member, Limestone District School Board

Sylvia Mills
Member, Keewatin-Patricia District School Board

Helen Spence
President

Ted Whiteland
Member, Upper Canada District School Board

**French-Language School Boards,
September 5, 2002**

***Association des agentes et agents de
supervision franco-ontariens (ASF0)***

Françoise Fournier
Member; Conseil scolaire de district du Centre
Sud-Ouest

Michel Paulin
Member; Superintendent of Business, Conseil sco-
laire de district catholique Franco-Nord

***Association des conseillères et des conseillers
des écoles publiques de l'Ontario (ACÉPO)***

Mona Fortier
Representative

Ronald Marion
President

Louise Pinet
Executive Director

Rémy Beauregard
Consultant

Jean Tanguay
Consultant

***Association des directions et des directions
adjointes des écoles franco-ontariennes
(ADFO)***

Serge Plouffe
Chair

Claire Thibodeau
Vice-Chair

***Association des enseignantes et des
enseignants franco-ontariens (AEFO)***

Lise Routhier-Boudreau
Chair

***Association franco-ontarienne des conseils
scolaires catholiques (AFOCSC)***

Angèle Brunelle
Representative; Conseil scolaire de district
catholique des Aurores boréales

Denise Labelle
Representative; Conseil scolaire de district
catholique des Grandes Rivières

***Conseil ontarien des directrices et des
directeurs de l'éducation de langue française
(CODELF)***

Denis S. Chartrand
Member; Director of Education and Secretary-
Treasurer, Conseil des écoles publiques de l'Est de
l'Ontario

Lise Gadoury
Member; Director of Education, Conseil scolaire
de district catholique Franco-Nord

Jean-Jacques Legault
Chairperson, French-Language Division; Director
of Education and Secretary, Conseil scolaire de
district catholique de l'Est ontarien

Parents partenaires en éducation (PPE)

Ghislaine Pilon
Member, Board of Directors; Conseil scolaire de
district catholique Centre-Sud

Appendix F: Participants in Meetings with Provincial Stakeholder Associations

All meetings with provincial stakeholder associations were held in Toronto.

October 2, 2002

Ontario Federation of Home and School Associations (OFHSA)

Lesley Schuurs
President

Sue Robertson
First Vice-President

Ontario Association of Parents in Catholic Education (OAPCE)

Maire Bracken
President

Claire Budziak
Region 5 Vice President

Michele Piccini
Secretary

Connie Dresser
Treasurer

Mary Ann Cuderman
Executive Director

Parents partenaires en éducation (PPE)

Diane Ellis
President

Ghislaine Pilon
Member, Board of Directors

Ontario Public School Boards' Association (OPSBA)

Gerri Gershon
President

Rick Johnson
First Vice-President

Bob Allison
Adviser

Carla Kisko
Adviser

Sam McKinley
Adviser

Camille Quenneville
Director of Policy Development

Cynthia Andrew
OPSBA Staff

Ontario Catholic School Business Officials' Association (OCSBOA)

Jim LoPresti
President

David Visser
Vice-President

Wally Easton
Co-Chair, Finance Committee

Tony Davidson
Co-Chair, Finance Committee

Gerry Thuss
Member

Ryan Putnam
Member

Council of Ontario Directors of Education (CODE)

Angelo DiIanni
Chair

Barry O'Connor
Vice-Chair

Michel Serré
Past Chair

Frank Kelly
Executive Director

Ontario Public Supervisory Officials' Association (OPSOA)

Ruth Mattingley
President

Frank Kelly
Executive Director

Wayne McNally
Treasurer

Ontario Association of School Business Officials (OASBO)

Don Higgins
President

Ontario Catholic School Trustees' Association (OCSTA)

Louise Ervin
President

Paul Whitehead
Vice-President

Pat Daly
Member, Board of Directors

John Stunt
Executive Director

Carol Devine
Director, Political Affairs and Media Relations

Ontario Catholic Supervisory Officers' Association (OCSOA)

Pat Manson
President

John Watts
Vice-President

John Wheatley
Executive Director

Ontario Parent Council (OPC)

Trudy Griffiths
Chair

Dale Thomson
Parent Member

Julie Anne Heidman
School Council Representative

Donald Hill
Parent Member

Michael O'Gorman
Parent Member

Christine Beachey
Executive Co-ordinator

Catholic Principals' Council of Ontario (CPCO)

Nelly Kelders
President

Lou Rocha
Executive Director

Ontario Teachers' Federation (OTF)

Phyllis Benedict
President

Susan Langley
Secretary-Treasurer

Ruth Bauman
Executive Assistant

Kathleen Devlin
Executive Assistant

Elementary Teachers' Federation of Ontario (ETFO)

Emily Noble
President

Ruth Behnke
First Vice-President

Kathy Clarke
First Vice-President

David Clegg
Vice-President

Gene Lewis
General Secretary

Marilyn Roycroft
Deputy General Secretary

Barbara Richter
Executive Staff

Pat McAdie
Executive Staff

Ontario English Catholic Teachers' Association (OECTA)

Kathy McVean
President

Greg Pollock
General Secretary

Association franco-ontarienne des conseils scolaires catholiques (AFOCSC)

Joseph Bisnaire
President

Robert Gagné
Executive Director

Association des conseillères et des conseillers des écoles publiques de l'Ontario (ACÉPO)

Ronald Marion
President

Yvon Ferrand
Past President

Louise Pinet
Executive Director

October 4, 2002

Ontario Secondary School Teachers' Federation (OSSTF)

Earl Manners
President

Dale Leckie
Acting Director, Protective Services Department

***Ontario Student Trustees' Association/
L'Association des élèves conseillers et
conseillères de l'Ontario (OSTA/AECO)***

William Wong
President

Ontario Principals' Council (OPC)

Helen Spence
President

Michael Benson
Executive Director

***Minister's Advisory Council
on Special Education (MACSE)***

Lynn Ziraldo
Chair

People for Education

Fiona Nelson
Chair

Annie Kidder
Director of Communications

Gay Stephenson
Co-ordinator, Parent Network

Katheryn Blackett
Co-ordinator of Research

***Conseil ontarien des directrices et des
directeurs de l'éducation de langue française
(CODELF)***

Marc Dionne
Chair

Marc Godbout
Vice Chair

Toronto Board of Trade

Louise Verity
Director of Policy

Terri Lohnes
Senior Economist and Policy Adviser

***Association des directions et des directions
adjointes des écoles franco-ontariennes
(ADFO)***

Serge Plouffe
Chair

***Association des enseignantes et des
enseignants franco-ontariens (AEFO)***

Bernard Éthier
Assistant Executive Director

***Council of Senior Business Officials
(COSBO)***

Marilyn Marklevitz
Co-Chair; Waterloo Region District School Board

John Sabo
Co-Chair; York Catholic District School Board

Ron Trbovich
Durham District School Board

Don Grant
Hamilton-Wentworth District School Board

Rick Gales
Upper Canada District School Board

Steven Parfeniuk
Lakehead District School Board

Ed Hodgins
Trillium Lakelands District School Board

Terry Miller
Dufferin-Peel Catholic District School Board

John Guyatt
Toronto Catholic District School Board

Peter Derochie
Simcoe-Muskoka Catholic District School Board

Carla Kisko
Halton District School Board

Michel Paulin
Conseil scolaire de district catholique Franco-Nord

Bob Boucher
Sudbury Catholic District School Board

Pierre Filiatrault
Conseil scolaire de district catholique du
Centre-Est de l'Ontario

Luc Latulippe
Conseil des écoles publiques de l'Est de l'Ontario

***Fédération de la jeunesse franco-ontarienne
(FESFO)***

Noémi Paquette
President

***Canadian Union of Public Employees –
Ontario Region (CUPE)***

Brian O’Keefe
Secretary and Treasurer

Charlotte Monardo
Chair, School Workers Co-ordinating Committee

Judy Wilkings
CUPE National Researcher

Paul O’Donnell
Legislative Liaison

Ontario Chamber of Commerce

Ian Cunningham
Senior Vice-President, Chamber Relations

Rob Hinrichs
Volunteer

***Ontario Secondary School Students’
Association (OSSSA)***

Kara Lilly
Student Premier

***Ontario Catholic Student Council Federation
(OCSCF)***

John-Paul Rodrigues

Appendix G: Individuals and Organizations That Made Presentations and/or Provided Written Submissions

This list reflects all submissions received on or before October 4, 2002, where names of those making the submissions could be identified. Some of the individuals listed below made joint submissions. The total number of individuals and organizations in this appendix may therefore vary from the total number of submissions received that is cited in Chapter 1.

Individuals

Lyn Adamson
Dualeh Ahmed
Paul Aird
Leslie Andrew
Clair Angus
Sandra Anstey
Ben Anthony
Lindsay Ashwin
Peter Askey
Keith Auyeung
Vi Bain
Karl Baldauf
Joan Bale
Viraf Baliwalla
Toby Barrett, M.P.P.
Lyn Barsevskis
Mark Barsevskis
R.E. "Bob" Bartman
Luz Bascuñan
David Bauer
Helaine Becker
Donald W. Beggs
Gay Bell
Laurie Bell
Cindy Beman
Brenda Bennett-Learmonth
Phil Benson
Estelle Berry
Judith Bobka
Bernie Boesveld
Janet Bojti
Margaret-Elizabeth Borbely
Bryan Boughey
Catharine Boyce
Erin Boyce
Sara Boyce

Den Boychuk
Wendy Branson
Carol Brascoupe
Heather Brassem
Mary Breen
Judy Brown
Georgina Bruinsma Cajic
Irmgard Burchardt
F. Burnett
Marjorie Button
Mauela Byrnes
Rick Campbell
Terry Card
Susan Cardy
Don Cattani
Catherine Catton
Pat Cepin
Kathryn Chadwick
Vincent Chen
Terry Chisholm
Dr. Rosie Chong
Carl Chopp
Marilyn Churley, M.P.P.
Sheila Clarke
Ken Cleveland
John Clubine
Robert Code
Mike Colle, M.P.P.
Mary Louise Colquhoun
Casey Conklin
Phoebe Conway
Derrick Cooke
Tracy Cooke
Sheila Corkill
Alan Crook
L.D. Cross
Diana Daghofer

Nancy Dalrymple
Ron Dancey
Cynthia Dann-Beardsley
Alan Davidson
David Dawe
Ghi Dean
Greg deGroot-Maggetti
Marlene deGroot-Maggetti
Paula DeLorenzi
Denise Dennis
Lorie Dertinger
Dr. Janet de Ruiter
Michelle de Vos
A. Dewar
Paul Dewar
Caroline Di Cocco, M.P.P.
Susan Dingnan
Mercedes Di Nino
Cheryl Dinnin
St. John Dixon-Warren
Sally Drew
Flo Duncan
Harold Duncan
Susan Dykstra
Greg Edwards
Chris Ellis
Ihsan El-Sayed
Jim Emptage
Dag Enhorning
Andrea Esson
Brenda Fairweather
David Farley
Don R. Farquharson
Ute Fenner
Blair Fergusson
Paul Fernandes
Philip Fernandez

Lori Fisher
Pam Fitzgerald
David Fleet
David Fogarty
Ann Ford
Kim Forster
Janelle Fournier
Missy Fraser
Ryan Friedman
Bronwyn Funicello
Tracey Gagliardi
Diana Gauthier
Laura Gerber
Anna Germain
Helen Gerson
Peter Gillespie
Lijana Gleason
Paul Gleason
Chris Glover
Bette-Ann Goldstein
Stephen Goring
Juliette Gostyn
Patricia Gough
Kerri Graham
Julius Greff
E.J. Haggerty
Madeleine Hague
Dan Halas
Nancy Halbert
Nicole Haley
Bev Hall
Valerie Hall
Judy Halpern
Judy Hamilton
Howard Hampton, M.P.P.
Carla Hathaway
Gene Hayden
Lianne Hearne
Peter H. Hennessy
Margaret Hennig
Darcy Higgins
Elizabeth Hill
Lotje Hives
Graham Hollings
John Hoffman
T.J. Holmes
Nancy Hood
Brenda Hopkins
Tracy Horsman
Marg Hryciw
Catherine Hunt

Suad Iamad
Nancy Icely
Bernie Ikeda
Barbara Imrie
Anita Isaac
Paul Isaacs
Graham Jackson
Nancy Jackson
Laurie Johnson
Tracy Johnson
Rory Jones
M. Carl Kaufman
Mike Kelly
John Kent
Dr. Carol Ann Kernoff
Kris Kernohan
Ellen Kert
David King
Jill King
Sharon Kirkby
Dr. Maria Kokai
Tom Koperwas
Lorraine Kor
David N. Kornhauser
Joan Kott
Cliff Kraeker
Marie Kraus
Ellen Kurt
Pat Lacasse
Paulyne Lack
Marie Lafrenière
Jean-Marc Lalonde, M.P.P.
Arthur Lamarche
J.D. Lambert
Louisette Lanteigne
Noel Laplante
Jim Leet
Myrna Levy
Chris Li
Judi Lian
Kathy Lindsay
Grant Linney
Linda Lister
Michelle Little
Pat Little
Barb Loma
Cindy Long
John Lorinc
Anne-Marie Lott
Garry Lukachko
Peter Lutek

Peter Lynch
Cynthia MacDonald
Faye MacDonald
Kim MacDonald
Rick MacDonald
Lisa MacKinnon
David T. MacLeod
Lorraine MacLeod
Cathy Mallove
Sally Mancini
Tim Marks
Margaret Marland, M.P.P.
Tara Marshall
Lori Martin
Bonnie Martino
Carol Ann Mascherin
Irene Mathysen
Dan Maxwell
Sean McCammon
Pam McConnell
Wes McConnell
Suzanne McCormick
Bob McCracken
Karen McCulloch
Garth McGill
Hugh McKechnie
Maureen McKinney
Beth McLellan
Kirk McMahan
Nancy McNabb
Sandra McNairn
Vickie McPhee
Garry McPhie
Agostino Menna
Chris Mermer
Lisa Salter Michaelson
Carolyn Miller
David Miller, Councillor,
City of Toronto
R.G. Miller
Rick Moffitt
Nick Monsour
Cristina Montes
Bonnie Montminy
Greg Moon
Audrey Moore
Tracy Morency
Elaine Morgan
Siegmond Morgenstein
Kelly Mudry
Bill Muirhead

Laura Muirhead
Bill Murdoch, M.P.P
John Murphy
Kelly Murphy
Gregory Murray
Nancy Myers
Joanne Naiman
Fiona Nelson
Sandra Neményi
Linda Ness
Terri Nikolasevic
Michael O'Keefe
F.J. O'Grady
Mirka Orde
Marina Orzano
Anita Osborne
Nancy Palmer
Evalina Pan
MaryLou Parker
Jane Parry
Brenda Partridge
Jocelyne Pasman
Dudley Paul
John Pecsénye
Laurie Peterson
Dr. Michele Peterson-Badali
Yvonne Pezzack
Gerry Phillips, M.P.P.
Kathleen Pick
Bill Pike
Debbie Piquette
Errol Platt
Sally Plumb
Walter Pointner
Joseph Polito
Janet Poudrier
Jeff Prentice
Karen Prince
Colin Pritchard
Bob Prus
Susan Rab
Josee Rainville
Tim Ralph
Dr. John M. Ramsay
Peter Rasberry
Christopher Rees
Kim Reid
Hilde Reis-Smart
Mari Retka
Susan Richard
Susan Richman

Dale Ricker
Jill Ricker
Helen Riley
Barbara Robinson
Trevor Robinson
John Rodgers
Rico Rodriguez
Adela Roki
Edward Rooney
Linda Rosen
Christopher Rowles
Dianne Rubinoff
Tony Ruprecht, M.P.P.
Mari Rutka
Lisa Salter Michaelson
Helen Saraga
Michel Saraga
Olivia Sargeant
Karen Sarlo
Kathy Sauro
Donald C. Savage
Marc-André Savoie
John Sayer
Frances Schatz
Zoltan Schreindlar
Ian B. Scott
Janine Scott
Marthe Scott
Nancy Sedore
Mario Sergio, M.P.P.
Leslie Shannon
Sande Sharpe
Ronald Shewchuk
Joe Simpson
Ann Smith
Brian Smith
Fred Smith
Hugh Smith
Maranda Smith
Alyson Soko
Marianne Sollberger
Mimi Spencer
Sophia Sperdakos
Julie Spry
Diana Stapleton
Dave Stephens
Lorraine Stockie
Carrie Ann Taylor
Jo-Ann Taylor
Wendy Terry
Kathleen Therriault

Cindy Thomas
Scott Thomas
Jennifer Thurtell
John Tovey
Luigi Tucci
Tracey Turner
Robert Turvey
Susan Van Dyk
John Vandergraf
Oscar Van de Waller
Jane Veit
Julie Verrino
Steve Vespa
Anton Vidgen
Alexandra Vilde
Bev Vogel
Robert Vollum
Jane Wadden
Lillian Wagman
Carolyn Walker
Christine Wallace
Will Wallace
Heather Walters
Giles Warren
Lynn Watson-Sénécal
Aileen Weir
Phil Weir
Joanne Weishuhn-Lee
Dennis Wendland
Donald R. Werden
Laura Wheeler
Pat Whelihan
Suzanne Whitney
Lisa Widdifield
Dave Wildman
Ron Williamson
A.C. Wilson
Paul Wilson
Mark Witcomb
Megan Wood
Robert Wood
Al Woodhouse
Gordon Wright
Peter Wynnyczuk
Diane Zelem
Fang Zhai

Organizations

This list includes school boards.

8/36 and 11/38 Bus Operators Association,
Provincial Viability Committee of the Ontario
School Bus Operators Association, and The Great
Lakes Transportation Committee

African Canadian Legal Clinic

Air Cadet League of Canada

Algonquin and Lakeshore Catholic District School
Board

Allenby Parents' Association – Public Education
Access Committee

Allenby Public School Education Awareness
Committee

Alternative School Advisory Council/Parents for
Alternative Schools

Applegrove Community Complex

ARCH: Legal Resource Centre for Persons with
Disabilities

Army Cadet League of Canada (Ontario)

Association des conseillères et des conseillers des
écoles publiques de l'Ontario

Association des directions et des directions
adjointes des écoles franco-ontariennes

Association des enseignantes et des enseignants
franco-ontariens

Association des enseignantes et des enseignants
franco-ontariens Centre-Sud et Sud-Ouest conseil
publique n° 58

Association for Canadian Educational Resources

Association for Education and Rehabilitation
Ontario

Association franco-ontarienne des conseils sco-
laires catholiques

Association of Library Consultants and
Co-ordinators of Ontario

Association of Professional Student Services
Personnel

Avon Maitland District School Board

Avon Maitland Parents

Bedford Park Elementary Public School Council

Bedford Park Elementary Public School Council
Education Advocacy Committee

Black Action Defence Committee

Bloor Collegiate Parent Council

Bluewater District School Board

Bowmore Public School Students

Brampton Caledon Community Living

Brant/Haldimand-Norfolk Catholic District School
Board

Burnhamthorpe Public School

C.D. Farquharson Junior Public School Students

Caledon Central Public School Council

Campaign for Public Education

Campaign for Stable Funding of Adult English-as-
a-Second-Language Classes

Canadian Association for Health, Physical Educa-
tion, Recreation and Dance

Canadian Association for the Advancement of
Women and Sport and Physical Activity

Canadian Association of Student Activity Advisors

Canadian Coalition for School Libraries

Canadian Educational Resources Council

Canadian Federation of University Women –
Oakville

Canadian Federation of University Women –
Ontario Council

Canadian Parents for French

Canadian Union of Public Employees – Ontario
Region

Canadian Union of Public Employees – Ontario
Region 1165

Canadian Union of Public Employees – Ontario
Region 2204 Child Care Workers of Eastern
Ontario

Canadian Union of Public Employees – Ontario
Region 2357 Ottawa-Carleton Catholic District
School Board Support Staff

Canadian Union of Public Employees – Ontario
Region 4156 District School Board of Niagara

Canadian Union of Public Employees – Ontario
Region 4186 London Catholic District School
Board

Canadian Union of Public Employees – Ontario
Region 4222

Canadian Union of Public Employees – Ontario
Region 4400

Canadian Union of Public Employees – Ontario
Region Thunder Bay

Cashmere Avenue Public School

Catholic Children's Aid Society of Toronto

Catholic District School Board of Eastern Ontario

Catholic Principals' Council of Ontario

Catholic School Business Officials' Association

Catholic School Business Officials' Association –
Plant/Health and Safety Committee

Cawthra Park Secondary School

Cedarbrae Collegiate Institute School Council	Continuing Education School Board Administrators, South Western Ontario Division
Centennial (Waterloo) Public School Council	Coordinators of Attendance Counselling (Toronto District School Board)
Chatham-Kent Secondary School Parent Council	Cornwall Parent Support Group
Chiefs of Ontario	COSTI Immigrant Services
Children and Youth at Risk	Council of Ontario Directors of Education
Children and Youth at Risk Advisory Committee/ Frederick Banting Alternative School	Council of Outdoor Educators of Ontario
Children's Aid Society of Hamilton	Council of Senior Business Officials
Citizens for Public Education	Darlington Public School Parent Council
Cisco Systems Canada Co.	Delhi District Secondary School Council
City of St. Catharines	Dilico Ojibway Child and Family Services
City of Toronto – Office of the Chief Administrative Officer	District School Board Ontario North East
City of Toronto – Parks and Recreation Division	Down Syndrome Association of Ontario
Coalition for Educational Reform	Dufferin-Peel Catholic District School Board
Coalition for Music Education in Canada	Dundas County Community Living
Coalition of Educational Assistants of Ontario	Dundas Street Public School
Colborne Central Public School Council	Durham Catholic District School Board
College Heights Secondary School	Durham District School Board
Communist Party of Canada (Ontario)	Durham District School Board Parent Council
Community Living London	Earl Grey Senior Public School Council
Community Living Ontario	East Alternative School Parent Council
Community Living Stormont County	Educational Policy Advisory Committee
Concerned Parents of Toronto	Eglinton Public School Students
Conseil d'école secondaire Confédération	Elementary Teachers' Federation of Ontario
Conseil ontarien des directrices et des directeurs de l'éducation de langue française	Elementary Teacher's Federation of Ontario – Avon Maitland Teachers Local
Conseil scolaire de district catholique de l'Est ontarien	Elementary Teacher's Federation of Ontario – Near North Local
Conseil scolaire de district catholique des Aurores boréales	Elementary Teacher's Federation of Ontario – Peel Local
Conseil scolaire de district catholique des Grandes Rivières	Elementary Teacher's Federation of Ontario – Thames Valley Local
Conseil scolaire de district catholique du Centre-Est de l'Ontario	Elementary Teachers' Federation of Ontario – Thames Valley Occasional Teachers' Local
Conseil scolaire de district catholique du Nouvel-Ontario	Elementary Teachers' Federation of Ontario – Toronto Local
Conseil scolaire de district catholique Franco-Nord	Elementary Teachers' Federation of Ontario – Toronto Occasional Teachers' Local
Conseil scolaire de district des écoles catholiques du Sud-Ouest	Elementary Teachers' Federation of Ontario – Upper Canada District School Board
Conseil scolaire de district des écoles publiques de l'Est de l'Ontario	Elementary Teachers' Federation of Ontario – Waterloo Local
Conseil scolaire de district du Centre Sud-Ouest	Elmcrest Public School Council
Conseil scolaire de district du Grand Nord de l'Ontario	Enerlife Consulting
Conseil scolaire de district du Nord-Est de l'Ontario	English as a Second Language/English Literacy Development Resource Group of Ontario
	Eramosa Public School Advisory Council

Etobicoke Parents for Public Education
 Fairglen Junior Public School Students
 Family and Children Services of Guelph and Wellington County
 Fédération de la jeunesse franco-ontarienne
 Federation of Ontario Naturalists
 Forest Valley Outdoor Education School
 Freedom Party of Ontario
 French as a Second Language Community Liaison Group
 G.B. Little School Advisory Council
 Gananoque Secondary School
 Gananoque Secondary School Council
 Ganaraska Region Conservation Authority
 Girl Guides of Canada
 Girl Guides of Canada – London/Middlesex Board
 Girl Guides of Canada – Toronto Area
 Glebe Collegiate Institute School Council
 Glendale High School
 Grand Erie District School Board Staff
 Greater Essex County District School Board Staff
 Greater Ottawa Chamber of Commerce
 Greater Toronto Catholic Parents' Network
 Greenbriar Parent Council
 Grenville Land Stewardship Council
 Halton Catholic District School Board
 Halton District School Board
 Hamilton-Wentworth Catholic District School Board
 Hamilton-Wentworth District School Board
 Hammond Transportation
 Hastings and Prince Edward District School Board
 Highway 11 Corridor Municipal Coalition
 Holy Rosary School
 Huntley Centennial Elementary School Council
 Huron-Perth Catholic District School Board
 Huron-Superior Catholic District School Board
 IBM Canada
 Industrial Education Services
 Inner City Network
 Institute for Catholic Education
 International Language Korean Program at Portage Trail Community School
 Island Natural Science Program (Toronto District School Board)
 James A. Magee Community School Council

John G. Diefenbaker Public School Students
 John Ross Robertson Public School Council
 Joint Rural Education Committee of the Huron and Perth County Federation of Agriculture
 Justice for Children and Youth
 Kawartha Pine Ridge District School Board
 Keewatin-Patricia District School Board
 Kenora Catholic District School Board
 Kitchener Downtown Business Association
 Laidlaw Foundation
 Lakehead District School Board
 Lakehead District School Board – Special Education Advisory Committee
 Lakehead Elementary Teachers' Association
 Lakehead Regional Family Centre
 Lambton Kent District School Board
 Lancaster School Council
 Laurel Creek Outdoor Education Centre (Waterloo Region District School Board)
 Learning Disabilities Association of Ontario
 Learning Opportunities Task Force
 Limestone District School Board Staff
 London and District Labour Council
 London District Catholic School Board
 London District Catholic School Council
 Lorne Park Public School Council
 Lorraine Kimsa Theatre for Young People
 Marchmont Public School Parent Council
 Matawa First Nation
 McGillivray Public School Parent Council
 Metrus Development Inc.
 Microsoft Canada
 Middlesex London Health Unit
 Minister's Advisory Council on Special Education
 Mood Disorders Association of Ontario
 Multicultural Council of Toronto
 Municipality of North Bruce Peninsula
 Muslim Parents' Association
 Nativity of Our Lord Catholic School
 Navy League of Canada – Ontario Division
 Near North District School Board
 Near North District School Board – Kindergarten Association North
 Nipissing-Parry Sound Catholic District School Board
 North Bay Literacy Council

Northern Ontario Education Leaders	Ontario English Catholic Teachers' Association – Simcoe Muskoka Elementary
Northern School Resource Alliance	Ontario English Catholic Teachers' Association – Toronto Secondary Unit
Northern Secondary School Council	Ontario Federation of Agriculture
Northwest Catholic District School Board	Ontario Federation of Home and School Associations
Northwestern School Boards	Ontario Federation of Home and School Associations – Region 1
Oakville Public Library	Ontario Federation of Labour
Office of the Commissioner of Official Languages	Ontario Federation of School Athletic Associations
Ontario Association for Families of Children with Communication Disorders	Ontario Guidance Association – Western Region
Ontario Association of Children's Aid Societies	Ontario Guidance Leadership Association
Ontario Association of Counselling and Attendance Services	Ontario Healthy Schools Coalition
Ontario Association of Parents in Catholic Education	Ontario Library Association
Ontario Association of School Business Officials	Ontario Parent Council
Ontario Association of Specialty Program Schools	Ontario Physical and Health Education Association
Ontario Association of Speech-Language Pathologists and Audiologists	Ontario Principals' Council
Ontario Catholic School Business Officials' Association	Ontario Public School Boards' Association
Ontario Catholic School Trustees' Association	Ontario Public Supervisory Officials' Association
Ontario Catholic Student Council Federation	Ontario School Bus Association
Ontario Catholic Supervisory Officers' Association	Ontario School Counsellors' Association
Ontario Chamber of Commerce	Ontario School Library Association
Ontario Coalition for Inclusive Education	Ontario Secondary School Students' Association
Ontario College of Teachers	Ontario Secondary School Teachers' Federation
Ontario Conference of Catholic Bishops	Ontario Secondary School Teachers' Federation – District 6A
Ontario Council for Children with Behavioural Disorders	Ontario Secondary School Teachers' Federation – District 7 Bluewater Teachers
Ontario Council of Administrators of Special Education	Ontario Secondary School Teachers' Federation – District 9 Greater Essex Teachers
Ontario English Catholic Teachers' Association	Ontario Secondary School Teachers' Federation – District 11 Thames Valley Teachers
Ontario English Catholic Teachers' Association – Durham Elementary Unit	Ontario Secondary School Teachers' Federation – District 12
Ontario English Catholic Teachers' Association – Eastern Unit	Ontario Secondary School Teachers' Federation – District 12 Professional Student Service Personnel
Ontario English Catholic Teachers' Association – London District	Ontario Secondary School Teachers' Federation – District 17 Teacher Bargaining Group
Ontario English Catholic Teachers' Association – Niagara Unit	Ontario Secondary School Teachers' Federation – District 24 Waterloo Region
Ontario English Catholic Teachers' Association – Nipissing Elementary Unit	Ontario Secondary School Teachers' Federation – District 25
Ontario English Catholic Teachers' Association – Ottawa-Carleton Catholic District School Board	Ontario Secondary School Teachers' Federation – Education Finance Committee
Ontario English Catholic Teachers' Association – Ottawa-Carleton District School Board	Ontario Secondary School Teachers' Federation – Near North
Ontario English Catholic Teachers' Association – Secondary	Ontario Secondary School Teachers' Federation – Ottawa-Carleton Education Support Professionals

Ontario Secondary School Teachers' Federation – Toronto Substitute Teachers
 Ontario Special Olympics
 Ontario Student Trustees' Association/L'Association des élèves conseillers et conseillères de l'Ontario
 Ontario Teachers' Federation
 Orchard Park School Council
 Organization for Quality Education
 Organization of Parents of Black Children
 Orillia District Collegiate and Vocational Institute School Council
 Ottawa Carleton Assembly of School Councils
 Ottawa-Carleton Association for Persons with Developmental Disabilities
 Ottawa-Carleton Catholic District School Board
 Ottawa-Carleton Catholic District School Board – Special Education Advisory Committee
 Ottawa-Carleton Catholic District School Board Support Staff
 Ottawa-Carleton District School Board
 Ottawa-Carleton District School Board – Advisory Committee on the Arts
 Ottawa Carleton District School Board – Special Education Advisory Committee
 Ottawa Carleton Student Transportation Association – Laidlaw Education Services
 Ottawa Children and Youth at Risk Advisory Committee
 Ottawa Technical Learning Centre
 Our Schools, Our Communities
 Overland Learning Centre Advisory Committee
 Parent Community Network – Toronto District School Board
 Parent Council at Mount Carmel School
 Parent Council at William Burgess Elementary School
 Parents' Action Group
 Parents for Alternative Schools
 Parents of Deaf Plus Ontarians
 Parents of the Township of Georgina
 Parents partenaires en éducation
 Parkholme School
 Parks and Recreation Ontario
 Peel District School Board
 Peel Principals' and Vice-Principals' Association
 People for Education
 Peter L. Roach Catholic Education Centre
 Peterborough Collegiate and Vocational School Council
 Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Phi Delta Kappa International
 Port Dover Save Our School Committee
 Queen Elizabeth School Council
 Rainbow District School Board
 Rainy River District School Board
 Red Sky Métis Independent Nation
 Regional Municipality of Waterloo
 Regional Section 19 Task Force/Young Parents' Resource Organization
 Renfrew County Catholic District School Board
 Renfrew County District School Board
 Resurrection School Council
 Retired Teachers of Ontario
 R.H. King Academy School Council
 Rideauwood Addiction and Family Services
 Ridgewood School Council (Peel District School Board)
 Robert-Smart Centre (Children's Mental Health Centre)
 Royal Canadian Sea Cadets/Navy League Cadets (Ontario Division)
 Runnymede Public School Council
 Sarnia District Labour Council
 Scarborough Outdoor Education School (Toronto District School Board)
 Scarborough Village Alternative Public School Parent Council
 Scarborough Village Public School Parent Group, Handicapped Wing
 School Advisory Council at Drewry Secondary School
 School and Community Council of Bruce Peninsula District School in Lion's Head
 School Community Advisory Council of South Grenville District High School
 School Community Council of Owen Sound Collegiate and Vocational Institute
 School Council at École élémentaire publique Le Prelude
 School Council of A.B. Lucas Secondary School
 School Council of Agincourt Collegiate Institute School
 School Council of Assumption College School
 School Council of Cathcart Boulevard Public School

School Council of Hornepayne High School	Thames Valley District School Board
School Council of Maple Grove Public School	Thames Valley Principals' Association
School Council of Park Lawn Junior-Middle School	Thames Valley Teacher-Librarians' Association
School Council of Sir Winston Churchill High School	Thunder Bay Catholic District School Board
School Council of White Stone Lake Central School	Thunder Bay Catholic District School Board – Special Education Advisory Committee
School Councils of Elementary Public Schools in Oakville	Thunder Bay Green Party
Science Coordinators' and Consultants' Association of Ontario Executive	Thunder Bay Superior North Riding Association of the Green Party
Seaway District High School	Tollgate Central School Council
Seven Generations Education Institute	Toronto Adult Education Association
Severn, Tay and Ramara Townships	Toronto and York Region Labour Council
Silver Creek School Council	Toronto Association for Community Living
Simcoe County District Health Unit	Toronto Association of Parents in Catholic Education
Simcoe County District School Board	Toronto Board of Trade
Simcoe County Principals' Association	Toronto Catholic District School Board
Simcoe County School Bus Operators' Association	Toronto Catholic District School Board – Special Education Advisory Committee
Simcoe Muskoka Catholic District School Board	Toronto District Music Coalition
Sparrow Lake Alliance	Toronto District School Board
Sparrow Lake Alliance Steering Committee	Toronto District School Board – Ward 16 Parent Council
St. Anne High School Council	Toronto District School Board – Youth Counsellors
St. Cecilia Catholic School Council	Toronto Elementary Catholic Teachers' Association – Toronto Catholic District School Board
St. Clair Catholic District School Board	Toronto English Catholic School Teachers' Association
St. David School	Toronto Family Network
St. Edmunds Parent Council	Toronto Federation of Chinese Parents
St. Helen's School Council	Toronto Parent Network
St. Helen's School Parent Council	Trillium Lakelands District School Board
St. John's College Parent Council	United Way of Greater Toronto
St. Joseph's Elementary School	University of Guelph, School of Rural Extension Studies
St. Jude's School – Scholars' Hall	University of Toronto, Faculty of Physical Education and Health
St. Lawrence Catholic School	University of Toronto, Transitional Year Programme
St. Matthew Catholic School Council	University of Western Ontario, School of Kinesiology
St. Theresa's Catholic School Council	University of Windsor, Faculty of Human Kinetics
Students Towards Environmental Protection	Upper Canada District School Board
Sudbury Catholic District School Board	Upper Grand District School Board
Sudbury Catholic District School Board Principals' Group	Ventin Group Ltd.
Sullivan School Community School Council	Victoria Park Secondary School Council
Summit Heights Elementary School Council	VOICE for Hearing Impaired Children
Superior-Greenstone District School Board	Voices for Children
Superior North Catholic District School Board	
Supporting Public Access to Community Space Everywhere	
Tait Street School Advisory Council	
Tamil Eelam Society of Canada	

Waterloo Catholic District School Board
Waterloo Region District School Board
Wellington Catholic District School Board
West Carleton Secondary School Council
West Elgin Secondary School Council
Westminster Public School
White Stone Lake Central School Council
Widdifield Secondary School Council
Windsor-Essex Catholic District School Board
Windsor-Essex Catholic District School Board –
High School Parents' Council

Windsor Jewish Community Centre
York Catholic District School Board
York Catholic District School Board Community
York Catholic Teachers' Association
York Environmental Education Consortium
York Mills Collegiate Parent Council
York Region District School Board
York Region District School Board – Race Rela-
tions Advisory Committee
Youth Counsellors at the Toronto District School
Board

Appendix H: Approach Used to Estimate the Cost of Updating the Benchmarks

In order to estimate as closely as possible the cost implications of my recommendations, I had to develop an approach to updating the benchmark costs in the funding formula. In doing so, I did not attempt to validate the existing benchmarks, but rather focused on developing an updating methodology to use for the purposes of this report. I was guided by two principles:

- **simplicity:** I wanted to keep the process simple. The student-focused funding formula, while significantly less complicated than its predecessor, remains a relatively complicated mechanism to understand and to explain.
- **transparency:** I wanted to include the updating methodology used by the task force in the report so that all stakeholders could review it. I am grateful to ministry staff for providing some of the data, without which I could not have made all of the calculations.

I reviewed several studies on updating benchmarks and appreciate that there is more than one way to update them.¹ (Notes for this appendix are at end of this appendix.) I am sure that, if my recommendations 1 through 3 are implemented, the Ministry of Education, school boards, and other members of the education community will want to review my approach and modify it as necessary for their own updates. Over the long term, the ministry may even wish to consider repeating the costing exercise conducted in 1997, which informed the establishment of the 1998 benchmarks.

One approach I considered involved examining estimates of actual costs for the most recent school board fiscal year (September 2001 to August 2002). Another involved applying various estimates of price or cost changes to the original benchmark costs. Because all the final costs for

the most recent fiscal year are not yet known (in some cases, detailed cost data for the province as a whole has simply not yet been collected), I opted to use a combination of these two approaches: I have adjusted some benchmarks on the basis of current cost estimates and others on the basis of the Ontario Consumer Price Index, its components, and other price change information.²

The base year for my update is 1998, the year the current funding formula came into effect, except where the Ministry of Education has added funding since 1998 and prior to 2002–03.³

In developing the update, I recognized that for some boards increases in some costs may have been smaller than average because of cost-saving measures they may have implemented in the period preceding 1998, such as transportation and purchasing consortia. While I applaud these measures, I did not attempt to analyse them or to factor them into my updating mechanism. Further, I believe that boards should not be penalized for saving money by having the benchmark costs downgraded to reflect the new, actual costs that result from cost-saving measures. Rather, boards should be allowed to retain these savings, as an incentive to continue looking for and investing in these measures.⁴

My basic approach to updating the benchmark costs, therefore, was to identify appropriate adjustments and apply those adjustments to the Ministry of Education's projected funding allocations for the current (2002–03) school year.

Appendix I contains a table, Table I.1, showing updates to individual grants and grant components and proposed new investments. Appendix J contains four tables. Tables J.1 and J.2 show the estimated

cost of updates by individual benchmark (Table J.1 is a summary; Table J.2 offers more detail). Tables J.3 and J.4 respectively provide detailed calculations for the update to the Transportation Grant and the update to the School Operations Allocation of the Pupil Accommodation Grant.

All updated costs are for the school year September 1, 2001, to August 31, 2002. The costs updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate the costs to August 2003.

Notes for Appendix H

1. See, for example, Hugh Mackenzie, *Cutting Classes: Elementary and Secondary Education Funding in Ontario 2002–3* (Ottawa: Canadian Centre for Policy Alternatives, 2002). Several of the submissions I received and presentations I heard included estimates of updating benchmark costs. I wish to mention in particular the input I received from Bob Boucher, Associate Director, Corporate Services, and Treasurer, Sudbury Catholic District School Board; Ron Trbovich, Superintendent of Education, Business Department, and Treasurer, Durham District School Board; and other members of school business officials associations.
2. Defining “costs” also presents a problem. In reviewing boards’ costs, questions arise about whether a certain cost meets the ministry’s basic standards or whether it goes beyond them, and, if it goes beyond them, whether it does so to address specific needs acknowledged by the ministry or to address local priorities that may not be seen by the ministry as needs. This is an issue that will have to be addressed by the ministry, school boards, and other members of the education community when they develop their own approach to updating the benchmarks.
3. The increases since 1998 and prior to 2002–03 are as follows:
 - The benchmark costs for salaries, with the exception of those for school operations staff, were increased by 1.95 per cent in 2000–2001. I factored this increase into my updates.
 - The Transportation Grant received a \$23-million increase in “one-time funding” in 2000–2001. That increase was made again as a one-time grant for 2001–02 and then added to the grant as an ongoing increase in 2002–03, pending the outcome of a review of the grant. I factored this increase into my updates.
 - The Local Priorities Amount (part of the Foundation Grant) was introduced in 2001–02 at \$100 per pupil. In 2002–03, it was increased to \$200 per pupil. My recommendation 17, on the Local Priorities Amount, is not related to updating benchmark costs.

In 2002–03, the ministry made the following changes to the funding formula. These changes did not affect my updates of benchmark costs, although I have made recommendations related to all three of the allocations mentioned below.

- It added \$25 million to the School Renewal Allocation of the Pupil Accommodation Grant.
 - It added \$20 million to the Transportation Grant.
 - It introduced the Declining Enrolment Allocation.
4. I discuss consortia and other cost-saving measures implemented by boards in Chapter 4, under “Student Transportation.”

Appendix I: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

Table I.1: Estimated Cost of Updating Benchmarks and Proposed New Investments – by Grant

Note: Calculations may not be exact because numbers have been rounded.

Grants and Grant Components	Ministry of Education Projected Funding Allocations for the Current Year (2002–03) ¹ (Millions)	Benchmark Cost Update to August 31, 2002 ² (Recommendation 1) (Millions)	Proposed New Investments (Millions)	Recommendation Numbers for Proposed New Investments
Foundation Grant				
Basic	\$7,479	\$477		
Local Priorities	\$401			
Special Education	\$1,374	\$88	\$250	23 & 24 (\$130M of \$250M of Intensive Support Amount funding to be allocated in 2002–03)
Special Education Per Pupil Amount (secondary panel)			\$19	26
Language	\$423	\$25	\$65	10
Geographic Circumstances				
Small Schools	\$70	\$4	\$50	15
Principals		\$1		
Remote and Rural	\$118	\$8		
Learning Opportunities	\$293	\$19	\$50	6
Continuing Education	\$141	\$8		
Teacher Qualifications and Experience	\$558	\$30		
Early Learning	\$10	\$1		
Transportation	\$611	\$80 ³		29 (\$20M to be allocated in 2002–03)
Declining Enrolment	\$17		\$5	16
School Board Administration and Governance	\$456	\$40		

Grants and Grant Components	Ministry of Education Projected Funding Allocations for the Current Year (2002–03)¹ (Millions)	Benchmark Cost Update to August 31, 2002² (Recommendation 1) (Millions)	Proposed New Investments (Millions)	Recommendation Numbers for Proposed New Investments
Pupil Accommodation				
School Operations	\$1,396	\$165		
School Renewal	\$241	\$25	\$50	19
Deferred Maintenance			\$200	20
New Pupil Places	\$363	\$39		
Prior Commitments	\$307			
OMERS Recovery⁴	\$(80)			
School Authorities⁵	\$38			
	\$14,215¹	\$1,010²	\$689	

Notes:

1. Source: Ontario, Ministry of Education, “Student Focused Funding: School Board Funding Projections for the 2002–03 School Year” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203projection.pdf>>, 5, “Provincial Total” table, last column “2002–03 Projections.” *All figures have been rounded.* Following publication of this document, the 2002 Provincial Budget added \$45 million to the allocations (\$20 million for Transportation and \$25 million for School Renewal), for a revised total of \$14,260 million.
2. See Appendix H for the approach used to update the benchmark costs. Updates to August 2003, *not including* teaching and support staff salary and benefits, would require an additional estimated \$70 million based on a projected annual increase of 2% in the Ontario Consumer Price Index.
3. The benchmark cost update of \$80 million excludes \$23 million in adjustments to the Transportation Grant made in 2001–02. See Appendix J, Table J.2.
4. The Ontario Municipal Employees Retirement System (OMERS) is in surplus; therefore, school boards are not required to make full pension contributions for staff who are members of OMERS. Since the benchmark cost for benefits is based on the assumption that boards are making the full contribution, the ministry deducts the savings from the boards’ allocations.
5. School authorities are funded outside the grant structure. A school authority usually operates a single school in a very isolated area, or a school in a children’s treatment centre or hospital.

Appendix J: Estimated Cost of Updating Benchmarks – by Benchmark

This appendix contains four tables, as follows:

- “Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark” provides a summary of the total cost of updating each benchmark category.
- “Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark” provides more detailed information than Table J.1. Following Table J.2 are notes that offer additional information about the calculations.
- “Table J.3: Details of the Calculations Used to Update Transportation Costs”
- “Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks”

The base year for the updates is 1998, the year the current funding formula came into effect, except where the Ministry of Education has added funding since 1998 and prior to 2002–03. The 1998 base costs were derived from actual school board costs in 1997.

Table J.1: Summary of Estimated Cost of Updating Benchmarks – by Benchmark

Benchmark	Total Cost (Millions)
Teachers’ salaries	\$366
Non-teachers’ salaries	\$93
School operations staff salaries	\$45
Benefits	\$170
Learning materials	\$22
Classroom supplies	\$28
Classroom computers	\$14
In-school administration (supplies)	\$2
Board-level administration (supplies)	\$15
School operations non-salary costs	\$111
Transportation	\$80
School renewal	\$25
New pupil places	\$39
Total	\$1,010

Table J.2: Estimated Cost of Updating Benchmarks – by Benchmark

Note: Some calculations may not be exact because some numbers have been rounded.

Benchmark	Current Benchmark Cost	Updated Cost (to August 31, 2002)	Change	Total Cost (to August 31, 2002)	Notes (Additional notes follow this table.)
Projected average teachers' salaries	\$50,975	\$53,320	4.6%	\$366M	<ul style="list-style-type: none"> – Based on an analysis of negotiated settlements – Using the funding formula's instructional salary matrix, the average salary would increase from \$55,059 to \$57,591.
Non-teachers' salaries:					<ul style="list-style-type: none"> – Assumes same increase as for teachers' salary benchmarks – Excludes school operations staff (see below)
Elementary					
– Principals	\$79,296	\$82,944			
– Vice-principals	\$72,360	\$75,689			
– Teaching assistants	\$22,590	\$23,629			
– Professionals	\$43,686	\$45,696			
– Secretaries	\$28,346	\$29,650			
– Classroom consultants	\$70,171	\$73,399			
Secondary			4.6%	\$93M	
– Principals	\$86,479	\$90,457			
– Vice-principals	\$76,337	\$79,849			
– Department heads	\$3,262	\$3,412			
– Professionals	\$43,686	\$43,696			
– Secretaries	\$29,859	\$31,233			
– Classroom consultants	\$70,171	\$73,399			
School operations staff costs (based on cost per sq. ft.)					<ul style="list-style-type: none"> – 1.95% + 4.6% = 6.6% – The 1.95% covers the increase given to all other staff in 2000–01. The 4.6% is an assumption of the same increase as was applied to teachers' salary benchmarks.
– Salaries	\$2.97	\$3.17	6.6%	\$45M	
– Non-salary costs	<u>\$2.23</u>	<u>\$2.64</u>			
– Total costs	\$5.20	\$5.81			
Benefits					<ul style="list-style-type: none"> – Includes \$9M for school operations staff benefits
– Teachers	12%	13.1%	9.2%	\$85M	
– Non-teaching staff	15.7%	19.2%	22.3%	<u>\$85M</u>	
				\$170M	
Textbooks and learning materials					<ul style="list-style-type: none"> – Based on increases in Ontario CPI
– Elementary	\$75	\$83	10.3%	\$14M	
– Secondary	\$100	\$110	10.3%	<u>\$8M</u>	
				\$22M	
Classroom supplies					<ul style="list-style-type: none"> – Based on increases in Ontario CPI
– Elementary	\$77	\$85	10.3%	\$14M	
– Secondary	\$173	\$191	10.3%	<u>\$14M</u>	
				\$28M	
Classroom computers					<ul style="list-style-type: none"> – Based on increases in Ontario CPI
– Elementary	\$43	\$47	10.3%	\$9M	
– Secondary	\$56	\$62	10.3%	<u>\$5M</u>	
				\$14M	
In-school administration (supplies)	\$5	\$6	10.3%	\$2M	<ul style="list-style-type: none"> – Based on increases in Ontario CPI

Benchmark	Current Benchmark Cost	Updated Cost (to August 31, 2002)	Change	Total Cost (to August 31, 2002)	Notes (Additional notes follow this table.)
Board administration (supplies)	\$67	\$74	10.3%	\$15M	– Based on increases in Ontario CPI
School operations non-salary costs (based on cost per sq. ft.)					– \$54M for the salary and benefits components of school operations is accounted for above in the “School operations staff costs” and “Benefits” sections
– Salary components	\$2.97	\$3.17	6.6%		
– Utility components	\$1.01	\$1.30	28.8%	\$79M	
– Other components	\$1.22	\$1.34	10.3%	\$32M	
– Total costs	\$5.20	\$5.81	11.7%	\$111M	
Transportation	\$587M		17.5%	\$80M	– See Table J.3.
– Base funding for this calculation is the 2001–02 total of \$581M plus \$6M for the transportation component of the Declining Enrolment Allocation				(\$103M minus the \$23M already provided. See note 3 at the end of Appendix H.)	
School renewal					– Based on increases in Ontario CPI
– Elementary	\$64M	\$71M	10.3%	\$25M	
– Secondary	\$83M	\$92M	10.3%		
New pupil places					– Based on increases in Ontario CPI
– Elementary	\$117M	\$129M	10.3%	\$39M	– The updated costs do not differentiate between “old” and “new” construction costs. See note 7, below.
– Secondary	\$126M	\$139M	10.3%		

Notes:

- Teachers’ salaries:** I used the 2001–02 negotiated salary grids and data on the distribution of teachers by board to determine the “actual” current (2001–02) salary costs for teachers (the figure is based on contracts representing over 90% of teachers), and then compared that amount to the amount generated by the existing salary benchmarks. The difference was 4.6%. I applied this percentage to obtain my estimate of the cost of updating the teachers’ salary benchmark cost.
- Non-teachers’ salaries:** This category includes principals, vice-principals, secretaries, professional and para-professional support staff, directors of education, and board administrative staff. It excludes school operations staff. (See note 6, “School operations,” below.) I used the 4.6% increase calculated for teachers’ salaries to estimate the required adjustment.
- Benefits:** My estimated increases in statutory and non-statutory benefits are based on a review of actual benefit expenditures. The benchmark rate was adjusted from 12% to 13.1% of teachers’ salaries and from a weighted average of 15.7% to a weighted average of 19.2% of non-teachers’ salaries. I then applied those factors to the increased salary benchmark costs for teaching and non-teaching staff (see notes 1 and 2 above) and to the salary benchmark cost component of School Operations.
- All other “learning” costs (textbooks, classroom supplies, classroom computers), in-school administration costs, and board-level non-salary costs:** These items were increased by the percentage change in the Ontario Consumer Price Index (CPI) for the period 1997–2002.
- Transportation:** To develop the cost adjustment factor for transportation, I used a model that identifies the major expenses by category and the total cost of operating a 72-passenger bus for a school year. I then determined the cost increases on the basis of price changes derived from bus contracts and available price indexes. In determining these increases, I took into account the \$23 million increase the ministry made to the grant in 2001–02. Details of the cost update for transportation are presented in Table J.3.
- School operations:** The School Operations Allocation includes the costs of school operations staff, contracted services, insurance, maintenance supplies and equipment, and utilities.

Since the salary benchmark costs of school operations staff were not increased by 1.95% in 2000–2001 when other salary benchmark costs were increased, I applied that 1.95% increase and then added the 4.6% adjustment I had calculated for teachers’ salary benchmark costs (see note 1 above) for a total increase of 6.6%. I used the 6.6% to calculate the update for the salary benchmark costs of school operations staff.

I updated utility benchmark costs on the basis of increases in the Ontario CPI since 1997 in the costs of water, fuel, and electricity. All other school operations benchmark costs were also updated on the basis of changes in the Ontario CPI since 1997.

7. **School renewal and new pupil places:** My update of benchmarks costs for the School Renewal and New Pupil Places Allocations of the Pupil Accommodation Grant is based on changes in the Ontario CPI. I considered using the Non-Residential Construction Price Index, but since it applies to only Ottawa and Toronto and is only available on a quarterly basis, I decided to use the Ontario CPI as a “proxy.”

If my recommendation 3 is implemented and the funding formula is reviewed on a regular basis, the Ministry of Education and education stakeholders will want to determine an appropriate methodology and index for updating the benchmarks in the School Renewal Allocation of the Pupil Accommodation Grant. They will also want to consider the effect of the ministry’s initiative to assess school renewal needs, described in Chapter 4 under “School Renewal,” on the School Renewal Allocation’s benchmark costs.

Updating the benchmark costs in the New Pupil Places Allocation will prove more complex. As I explained in Chapter 4, since 1998 funds have been provided under this allocation for both “old” construction – construction that is well under way or completed – and for “new” construction – construction that has not yet begun. My calculation of the cost of updating the benchmark costs in the New Pupil Places Allocation, which is set out in Table J.2, does not differentiate between funding for “old” and “new” construction costs because of the difficulty involved in separating these two costs in the current funding allocation. In recommendation 21, I recommend that “the Ministry of Education review the benchmark costs in the New Pupil Places Allocation with a view to distinguishing between benchmark costs for construction that is under way or has been completed and benchmark costs for construction that is projected, and that it update and review, as described in recommendations 1 and 3, only the benchmark costs for construction that is projected.”

Table J.3: Details of the Calculations Used to Update Transportation Costs

Component	Share of Expenditures	Change (from 1997 to 2001–02)	Description
New bus costs	26.8%	32%	– Cost of a 72-passenger bus in 1997 and 2002
Licensing, inspections, and insurance	5.2%	50%	– Reflects increase in insurance and inspection costs
Fuel	9.6%	9.6%	– Ontario, unit cost price for diesel fuel (Ministry of Environment and Energy)
Drivers	27.4%		– Wages: 1.95% + 4.6% = 6.6%
– Wages		6.6%	The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers’ salary benchmarks.
– Benefits		3.5%	– Benefits: Increase is the same as that applied to non-teachers benefits.
Vehicle maintenance	18.5%	11.7%	– Based on increases in Ontario CPI component “Automotive vehicle parts, maintenance, and repairs”
Other components	12.5%	10.3%	– Based on increases in Ontario CPI
– Buildings, etc.			
Total	100%	17.5%	

Table J.4: Details of the Calculations Used to Update the School Operations Benchmarks

Component	Share of Expenditures	Change (from 1997 to 2001-02)	Description
Salaries and benefits			
– Salaries	57%	6.6%	<ul style="list-style-type: none"> – Wages: $1.95\% + 4.6\% = 6.6\%$ The 1.95% covers the increase given to most staff in 2000–2001. The 4.6% is an assumption of the same increase as was applied to teachers’ salary benchmarks. – Benefits: Increase is the same as that applied to non-teachers benefits.
– Benefits		22.3%	
Utilities			
– Gas	20%	28.8%	<ul style="list-style-type: none"> – Based on increases in Ontario CPI component “Water, fuel, and electricity”
– Electricity			
– Sewage and water			
Other costs	23%	10.3%	<ul style="list-style-type: none"> – Based on increases in Ontario CPI
– Supplies and equipment			
– Contract services			
– Insurance			
Total	100%	11.7%	

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Good evening Director, Madame Chairperson, Trustees and members of Senior Administration. My name is Sara Broderick and I am serving as Chair of Annunciation school's parent's club and I have four children that currently attend Our Lady of the Annunciation School and another that graduated and now attends St. Anne's High School.

During this ARC process, one theme has remained constant whether we are examining the Value to the student, the Board, the community or the local economy. This theme is the importance of the availability of English speaking Catholic education to our families.

As parents, we know that we are the first teachers for our children in the ways of faith. However, as parents we rely on help from our parish and our school. Through a child's early years the seed of faith is planted and then nourished through the partnership of family, church and school. The special ministry of a Catholic school is precisely to support parents in fulfilling their mission of being the first evangelizers of their children. What makes a Catholic school different from a public school? It seems simple and obvious on the surface but its meaning is very deep. A Catholic school is a Christ centered school where every lesson and teaching is based on the teachings and life example of Jesus.

Catholic Bishops regard Catholic schools as "an essential ministry of the Catholic Church", one that serves, first and foremost to enhance the spiritual enlightenment of our students through the teaching of Catholic doctrine and through the formation of a Catholic community. The students at Our Lady of the Annunciation School enjoy a close relationship with our Parish Priest, Father Bob and with Jamie Souilliere our Pastoral Assistant. We are fortunate that in addition to our school masses, Liturgies of the Word and the celebration of the sacrament of reconciliation, Father Bob and Jamie are frequent visitors to our school to talk with the students about the gospel teachings. This connection which is forged between our parish and our school community strengthens the bond students feel when they attend Sunday mass. Our children are very familiar and comfortable with our priest and support people. Most importantly, the message

of Christ's life and teachings are brought to our students in a supportive communal setting where they are encouraged to live the values of Christ.

Our school masses are also attended by members of the community and are followed by an all school luncheon in the Parish Hall. It is wonderful to hear from the community about how well our students participate in the mass and how well behaved and respectful they are during mass. Ultimately, the community is bonded together and is strengthened because the celebration of mass with our Parish Priest, our school community and the greater community takes place within our community and not in a distant place after a long bus ride among strange faces.

Sacramental preparation for our grade 2 students is occurring at school and at church. During the year, on a number of occasions our students are recognized at the beginning of mass and invited to participate in a class during the Sunday mass which is instructed by our pastoral assistant and his wife. Our students are not only receiving instruction about what the sacrament signifies but the student has the support and prayers of the community. The school and Church communities are so tightly woven that most know each other by name. Since the school and church work closely together and because there is the strong community support, students begin to develop their own spirituality and build a closer relationship with God.

Our children just took part in several activities to celebrate Catholic Education week. The theme was "walking in the light of Christ" and they were given the message to go out and be the light to those around them. They delivered messages of encouragement to the community including the nursing home. A par liturgy was followed by a picnic in the school yard and it was attended by parents and grandparents. Another exciting event was a night time BBQ prepared by our Knights of Columbus followed by a presentation by Carol McCloud who is an award winning author of "Have you filled a Bucket Today?" This event was very exciting for our school community. The theme of the book was consistent with the message of Christ's life; be a "bucket filler" which means

to do good deeds or to be nice to others and by filling someone else's bucket you are filling your own.

If English speaking Catholic education does not exist in our end of Essex county, then the strong connection between a school of the English Catholic Board and an amalgamation of four former parishes of the diocese in the new Visitation Parish will be broken and disbursed. The absence of a Catholic school that services 4 former parishes would be against the mission of the school board. It is unrealistic to assume that if our school were to close that the parents of our community would be able to choose another English Catholic School in another community over their parish, other school options in the area and the sense the Board has essentially abandoned their end of the county. The faith development of our students, the future of the catholic school board as well as the Catholic Church will be at serious risk. The ground work for strong, values oriented Catholic adults is being developed right now in our students. In order for this development to continue, community, school and church must work in unison.

While our community is aware that the Catholic Church and the Board has gotten smaller and there is a need for the restructuring of resources, there is no need for absolute surrender in our corner of the county. Instead, the Board should revitalize its existing resource, Annunciation School, or consider its options in renewing its presence in a new building with consideration of combining efforts with another board to ensure that Catholic Education is available in our corner of the county.

Questions which have been frequently asked questions include: If the school closes where will our children make their sacraments? Will they celebrate the sacrament in our church or one in a neighbouring town? How and who will prepare them? This connection is being threatened. We can't afford for individuals to be lost in the cracks, we need to have a solid and unified front that English speaking Catholic education is important and we will do what is necessary to preserve it in our area.

As such, the Committee representing Annunciation school agrees with the Director's report. Since we are operating at above 100% capacity, Our Lady of

the Annunciation school is receiving full funding to cover all of its expenses. The Annunciation committee also appreciates that the Director recognizes our school's unique boundary and more importantly agrees that English-speaking Catholic education should be preserved in our community. Therefore, the committee representing Annunciation believes that the Board should keep Annunciation open and consider all realistic options to maintain the Board's presence in our corner of the county.

My Name is Bev Vanier and I am a parent from Our Lady Of the Annunciation School and I am a member of the ARC.

Last October, when the news had been released that our school was going to be part of an Accommodation Review Committee, initially fear took over. We as a school community became afraid of the unknown, and our children began to express their concerns. People at church would stop and ask, "what's happening to OLOA?"

For the first time we as a community began to have conversations about what we would do? What would be best for our children? And the same thoughts kept surfacing...there was a consensus that we have a good thing going here, and it brought forth the question; what do we have to do to keep it.

Yes we understand that we have a 3 grade split this year, and that our school is an aging building. We also understand that the Board of Trustees have a large responsibility to make cutbacks and school closures will be inevitable.

OLOA has instilled life lessons not only in our children but in us as adults as well, a faith driven compass that has our hearts set on the positive and this direction of thinking has been our first priority throughout this entire journey.

We feel that by the director's report, he heard the message that we were trying to convey.

Our school is unique.

Yes our school may be smaller in size and enrolment, but our school is 100% capacity, which is ideal for the school board. Even with a large grade 8 class graduating, we will still remain at 100%.

We know that our geographical location is uncharacteristic to others in the school board. Lake St. Clair to the North and Chatham-Kent to the East, OLOA services English Catholic education to a very large area and that is worth preserving.

Our justification in our recommendations for our school was renewed during our JK kindergarten registration when more than half of our registrations were new families to our school, not just returning families.

People in the community see how incredible our students are, how prepared our graduates are here at OLOA, and even during such uncertain times, people still chose catholic English speaking education because they too believe that what we have going here is a good thing.

It is with great respect to the director that we acknowledge his recommendation. We see the potential for the Boards approval, regarding OLOA remaining open while the board pursues a partnership with the French Catholic Board and/or another neighbouring Catholic Board, and a wait the approval of funding from the

ministry of education for a new rural school building, constructed preferably near the new Visitation Church in Comber.

We hope that the Ministry of Education would consider, and the Board actively pursue Community use of Schools, and that the new school location be chosen as a *priority school*.

The location of the church and the possible new location of the school, has access to the 401 highway, CR 42, 46, 8 and 77, this can all be done with ease leading to many surrounding underutilized areas such as the Township of Lakeshore, Leamington, Essex and Chatham-Kent.

We encourage the board to possibly select this location to be an Ontario Early Learning Years Center. Having a program like this in our community could be very beneficial for our parents and caregivers, enabling them to:

- take part with their children in a range of programs and activities
- get answers to questions they might have about their child's development
- get information about programs and services that are available for young children and their families
- talk to early years professionals, as well as other parents and caregivers in the community.

At OLOA the Latch Key program is very successful and interest has been shown for programs that could be added to help in young child development. The Stoney Point area is currently underserved by a publicly funded

daycare. The nearest publicly funded daycares are Belle River's Sunshine Daycare and Tilbury's Tilbury Tots Daycare. A benefit to the new school for having an in school daycare service is simply a natural progression for young children to want to enroll in a kindergarten program where they all ready feel like they belong.

The Ministry of Education has other programs that are being utilized across the province and we would like to explore the idea and the benefits of a Parenting and Family Literacy Centre. This program currently exists within the GECSB and other locations in the province but not currently in our Catholic Board. This program could offer Parenting and Family Literacy support to prepare children for starting school and encourage families to be a part of their children's learning by:

- Helping children build essential literacy and numeracy skills through stories, music, reading and playing
- Encouraging families to engage in their children's learning
- Giving children and families the chance to spend time with other families
- Linking families with appropriate community resources for special needs, health and other related services.

The centre staff will work closely with kindergarten teachers to ensure a positive and welcoming learning environment that will help prepare children from babies up to six years of age for school. The centres are free to attend and no pre-registration is required.

These types of programs are implemented across the province, and I believe that if we have purposes for people to use the school, it's more likely that the communities' use of the school would increase.

LAFAs, Lakeshore Academy of Fine Arts, run by Sarah Ilijanich. Is interested in a joint use agreement, should the new school facility have a drama area and stage. She has produced many musicals and plays over the years and has rented such venues as The Capital Theater, Walkerville High School, and The Puce Rec Centre. She has been looking for a location that LAFAs could call home in the Lakeshore area.

We also believe that the exploration of a dual track or french immersion school be considered for this new location. Pointe Aux Roches is a French town, and there are two French Catholic grade schools within our boundary area, école st. paul and école st. ambroise.

The Ministry of Education has stated that future and possible merges with different schools is a possibility. Building a new rural school that is dual track or French immersion might be an opportunity for the WECDSB to implement some of these changes the Ministry of Education would like to see done, here in our area.

We understand that changes will be being made across the province and not just in our area. We do hope that given our unique location and the large boundary area that OLOA services English Catholic Education to, that compass of faith has guided us in the right direction, fear is no longer taking over our thoughts. We are hopeful

that our future years could possibly bring forth even greater tomorrows. We already know greatness, because our lives are rooted in faith. But what we have learned is that the potential that is in front of us, could be incredible. We thank you the Board of Trustees for the considerations you have given to OLOA, and a special word of thanks, to administration for the work and time that has been given to our school. And for seeing what we see "the gem of a school that we have."

Good evening to the parents, and trustees assembled here tonight. My name is Karmel Brockman. I am a mother whose son attends grade 8 at Our Lady of the Annunciation School. Tonight I will be addressing the topic "value to Student"

The children at Our Lady of the Annunciation School are very privileged. They learn and grow in a nurturing, stable yet challenging environment much similar to that of a family.

Our student's needs are met on every level whether spiritual, intellectual, emotional or social. The staff has been at our school for an average of 11 years and is truly committed to the complete development of each and every student. This continuity allows for easy transition from grade to grade. While many schools can boast about their ~~large staff size~~, the intimate setting of our school allows teachers to interact and consult with one another on all issues regarding a child. As a result, each child's progress is fully evaluated and having some children "falling through the cracks" as it were is a non issue here. Adjustments to enhance performance and progress are made quickly and efficiently.

The students at O.L.O.A are a tight knit group. The older students not only look out for the younger students but they also feel the responsibility to be good examples for them. Recently, the students had Track and Field day at St. Anne's High school. During the races, the students not only cheered each other on but when there was a primary or junior student having difficulty finishing the race, an older, intermediate student jumped in and ran the rest of the race with them. Our grade 8 students just returned from their trip to Muskoka Woods. At recess, the grade 8's are teaching students from JK to grade 7 how to perform some of the activities the grade 8's learned in Muskoka. It is wonderful to see the whole student body having fun together. The consistent interaction between the various groups of children promotes each child's development in their own way. Older students learn responsibility and are less self-absorbed while the younger students have role models. This type of interaction between the grades creates a very tight knit school community.

1.

The spiritual development of the children is nourished through the everyday teachings of the gospel within the classrooms. It is also a priority of the P.A.C to bus the children to Visitation Parish several times a year. This is a priority because it is very important for children to have the experience of celebrating mass in a church and not in a gym. Realistically, for some students, it is the only time they are able to attend church. These experiences are important to plant the seeds needed to become active Catholics as they get older. Each celebration is followed by an all school luncheon. Our size enables us to break bread together as a family. The older students partner up with the younger students to help them fix their meal. The students take a very active role in preparing and carrying out parts of the masses at Para liturgies through reading, serving, music, and the like. I cannot think of a better way to teach our children to "walk in the light of Christ".

The academic needs of our students are not just met but are exceeded. Teachers have the opportunity to customize their teaching to the child's ability and learning style. This type of individualized teaching does not make a child feel singled out but rather allows them to work at their own pace and to enjoy success when achieving their own goals. Don't think that just because Our Lady of the Annunciation is a small school it lacks the latest technology. On the contrary. Our staff and students have access to I Pads, I books, smart boards, levelled books, math manipulatives, musical instruments, workbooks and many other current and up to date learning tools. Even at the JK level, students are exposed to programs on the I pad and are bringing home books and reading them nightly. Our unique size allows us the opportunity to provide a variety of learning tools enabling our children to tap into all types of learning styles while preparing them for the technology of the future.

The children enjoy a balanced school life with a very active and successful athletic program. In spite of its size, the athletic teams compete successfully against similar sized schools as well as larger ones and have even won high school feeder tournaments. There are always more than enough students to field each team both boys and girls and the coaches are often commended on the good behaviour of the students. One of the advantages of being at a small school is that the whole student body is encouraged to participate on the sports teams. Many of our students have been on the "senior" sports team for a longer length of time due to small class sizes and therefore have an advantage over other larger schools who cut players to keep the team size manageable. It is not uncommon to have a senior team comprised of grades 5 through 8 and yet still be successful against a team of only grade 8 students. It is because of this encouragement that our athletes go on to being successful at the high school level of sports programs.

Ultimately, our children are well provided for and are nurtured all through their elementary years. The family style learning environment makes our children feel safe and secure. Speaking as a mother who has had two sons graduate and a third son to graduate from Annunciation this June, my boys entered high school with confidence and were well prepared and adjusted to succeed at the academic level in secondary school.

Our Lady of the Annunciation school should be celebrated and preserved. I am pleased to read that our Director agrees with the need for English speaking Catholic education in our area and that he is willing to investigate ways to expand it. Please keep rural English speaking Catholic education alive in our corner of the county.

BOARD PRESENTATION RE. ST. JOHN THE EVANGELIST SCHOOL

**FR. DAVE BOUTETTE
MAY 17TH, 2012**

I would like to begin by expressing my appreciation to the Director and his staff for the respectful and thoughtful response to the ARC Committee's recommendations and to much of the public input provided. And I am also glad to have this final opportunity to speak on behalf of St. John the Evangelist School and its future.

This school has had a very close and supportive relationship with me over the last seven years, with the church that sits beside it, and with the parish as a whole. I cannot think of another school with which I've been associated that has had a better rapport with me, and whose teachers as a whole have had more dedication to the faith development of their students.

You have already received a submission from Fr. Michael Ryan, an educator for most of his priestly life who lives in retirement with me in Woodslee. He spoke eloquently of the Catholic principles of social justice that come into play here, chief among them one that prioritizes the good of a community and its children over purely bottom-line concerns. For my part, I will simply express my belief that the price of closing this school, even a year from now, will be too high to pay.

I'd like to give you a small example of what I mean by this. A rather young mother who worked at the Board office had an opportunity earlier this year to address us at a deanery meeting held at the Board office. Our director joined us a little later at the same meeting but may not have been present for what she told us. This woman touched our hearts as she spoke of being drawn to the Catholic faith and eventually becoming a Catholic through the influence of her own little girl. A wonderful Catholic primary teacher had brought that little girl alive to her faith and she in turn sparked the latent faith of her own mom, a mom who was now working for our Board; sadly, she no longer does. But wherever she is working now she will bring the light of her faith.

That's evangelization, pure and simple. But we're about to throw away the opportunity for that sort of thing to go on if we let this school go. I've no doubt it can happen and does happen at other Catholic schools whether they are in Belle River, Essex or wherever they are. The question is, how many of *our* children will end up there as opposed to another option? And I have good reason to fear that option will be the public school system. And the Board needs to consider how many who do end up at St. John the Baptist or Holy Name of Jesus will end up in Catholic high schools in anywhere near the proportion that St. John the Evangelist students do.

These days a Catholic Board (and *a fortiori* our own Board) needs all the friends it can get. It needs to solidify its rural base, not alienate it.

Granted our parents don't always have all the facts to explain the incongruities they have seen. Nonetheless, what are their perceptions? They've seen buses headed down their own very roads to their preferred school of St. John's while their kids have been forced to go to town or provide their own transportation. When French immersion was introduced at St. Mary's in Maidstone, they've seen the English-programmed kids of that area re-zoned for Holy Name of Jesus rather than for St. John's. They've seen other Boards in Ontario maintaining schools far smaller in population. They've seen the French Separate Board in no hurry to amalgamate or close its small rural schools in this area. In fairness, it must be said that the Board and its administration deserves credit for funding an earlier introduction of all-day, everyday SK and JK for St. John's as well as considering the possibility of altered boundaries now.

Finally, I'd like to address what the loss could mean to the parish of St. John's and to the Catholic faith of the Woodslee area. To do that, I need to first describe the population we find at Mass on Sunday. We all know that numbers of practising Catholics are down everywhere and rural parishes are no exception. But I have remarked, as have many others at the number and percentage of young families, teens, children and young adults you will find at St. John's — a phenomenon you will not often find in other non-rural churches. In some respects it reminds me of those Dutch farming areas north of London. (Too bad more of those Dutch families didn't settle to farm here because they often have 6, 8 or even 10 children). It's difficult to single out any one factor in this but two things strike me. One is the generational factor. The faith and its practice has become part of the fabric of people's lives and seems to have been passed on successfully in many cases and particularly since more recent generations have chosen to live in the same community as their parents and grandparents. It also strikes me that here a rather larger proportion of men and fathers ~~who~~ seem to take their faith and its practice seriously. And studies have shown how influential a father's practice of the faith can be. Even some of the newer Woodslee families that are not Woodslee natives have either come with the same spirit or absorbed it.

What will be the likely scenario with the loss of the school? Certainly one of the first concerns young parents have when they move to an area or even remain there for generation after generation is whether there will be a school accessible to them within their own community. I'm afraid the loss of the school will soon mean the loss of families, and the loss of families will eventually mean the loss of the parish, and with the loss of the parish the loss of a whole culture of faith.

In my view it is a culture that a Catholic Board should do all in its power to preserve.