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ABSTRACT

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

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INFORMATION SYSTEM: ANALYSIS FOR THE
PEEL BOARD OF EDUCATION

Volume I: Description

Susan Padro

March 1977

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ACKNOWLEDGEMENT

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

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

in the project and conducted the analysis for several management areas of the Peel Board with great success.

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

INTRODUCTION

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

OBJECTIVE AND SCOPE OF THE STUDY

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

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

Two foci have been defined for the systems study: the planning function and computer operations. Both these areas have as their

terms of reference a broad range which cuts across departmental boundaries and the entire range of board operations. This made them particularly available to aid in the orientation of the systems study as well as in this project. In addition, at the time the study was undertaken, both the above departments were relatively newly formed units at the board level, and it was expected that their role in the MIS study would aid in the definition and facilitation of their operations.

APPROACH OF THE STUDY

The design of the Management Information System, as conceived in this project, is based on user needs rather than the traditional computer-oriented approach to MIS. This means that the systems design is based on the information needs of the users rather than on the hardware constraints of the computer. The computer is considered one component of the over-all system, in conjunction with other media for storage, processing and retrieval, including the manual components. This ensures that information areas which cannot be efficiently or effectively handled by the computer are not overlooked. The result is a total, integrated system which best serves the information requirements of the Board's decision makers.

Given the frame of reference of the study, a major component was the identification of the "users" of the MIS and determination of their information needs, as related to their management functions.

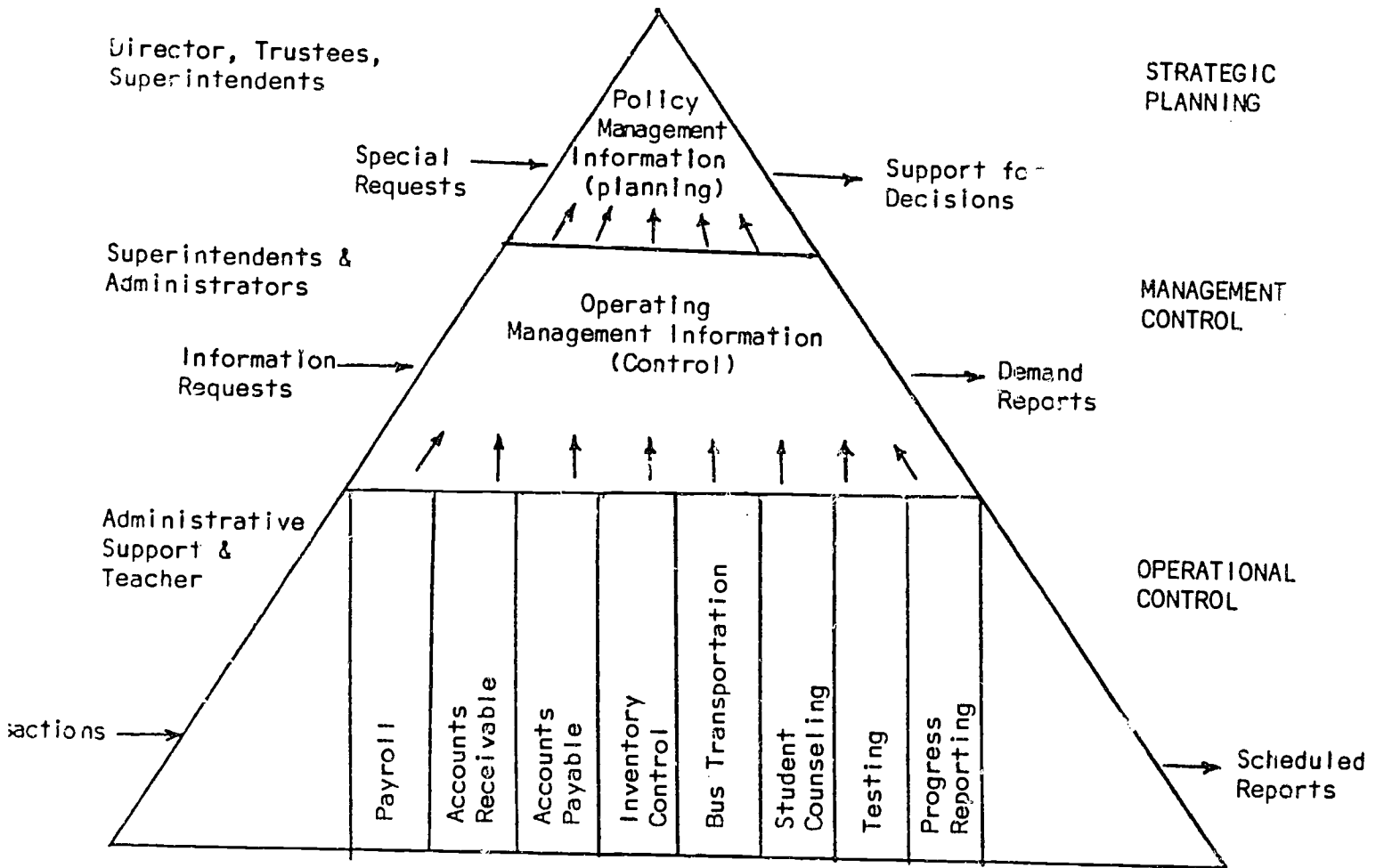
Operationally, this included: (a) the definition of the major management areas with personnel responsible for them; (b) analysis of the processes in each area; (c) determination of relevant information requirements; (d) identification of source data and timing required to produce the information; and (e) analysis of information flows between the management areas.

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

Since this approach maintains the importance of information as supportive of the decision-making processes of the Board, the general conceptual framework upon which it is based is one which relates information levels of decision-making, as in Figure 1. Three levels of management decisions are shown to be supported by the MIS: operational control, management (tactical) control and strategic planning. Operational control relates to the daily routine transactions of the system--purchasing, payroll, inventory control, etc. Management control is concerned with short-range questions of policy implementation. Strategic planning addresses itself to problems of policy-setting and long-range planning. The MIS design incorporates the information required for these three categories of decisions. The distinction between these types of information is useful because each involves different methods of generation, transformation and presentation. Strictly computer-oriented information systems usually

Figure 1

Management Levels and Information Flow



are geared to the production of information for operational and tactical control; they tend to ignore information at the strategic planning level. The orientation of this study is to take all the necessary types of information into account.

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

PEEL: Mr. Murray Skinkle - Liaison Officer

Mr. Tom Costigan

Mr. Glen Whaley

OISE: Dr. Susan Padro - Principal Investigator

Mr. Ted Vangel

Mr. Bryan Elwood

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

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

*Some of the personnel listed were not on the project for its entire duration. Dramatic changes occurred in the OISE group, which lost Mr. Vangel and Mr. Elwood in the winter of 1976.

intensive personnel-oriented first stages of the study, as well as providing insights into the operating areas of the Board with their constraints and priorities. This approach has been extremely useful in ensuring the relevance of the project to the needs of the Board and in establishing the confidence and close working relationship with the Board's personnel essential to the success of the study.

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

SUMMARY OF OUTCOMES

The outcomes of the study can be summarized as follows:

1. Systems analysis of the Board's operations. For each of the major management areas there is detailed analysis of its components with flowcharts of these activities, and their relationship to other major Board functions.
2. Need analysis for information system design. Information needs of the major management areas are defined in terms of user requirements, reports and data sources.

3. Synthesis of the information structure of the Board. This is presented in terms of an integrated overview of Board functions related to the pattern of information flows, levels of decision-making and clusters of information.
4. Recommendations for system implementation. Outline of further steps required for operational system design and implementation.

PROCEDURES AND OUTPUTS

A. Initialization

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

The boundary of the system under study was defined as the operations of the central board office. Functions external to it were to be included only in terms of their interface with that office.

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

The OISE personnel contributed their technical expertise in the analysis and synthesis of the systems study. At the time that the study was initiated, the board had just completed a total change in organizational structure. It was necessary, at this initial stage of the project, for the OISE members of the Task Force to familiarize themselves with this new structure, as well as with the program areas and functions of the board. For this purpose, a general review of the system's operations was carried out.

This consisted of a series of interviews conducted by the OISE project staff with each of the Superintendents at the central office level in both the Academic and Business divisions. Appendix A presents the results of these interviews by Board department. In addition to providing the project team with information about the operations of the Board, these interviews also provided the key officials with the opportunity to acquaint themselves with the nature of the study and the OISE project staff.

B. Analysis: Procedures

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

Establishment of User Needs:

User needs were defined by the Task Force members in terms of twelve major management areas of the central office of the Board. It was agreed that these areas defined the major activities of the Board, and would form the basis for the Information System design. Table 1 provides a list of these major management areas. It must be noted

TABLE 1: INFORMATION SYSTEM/PEEL COUNTY SCHOOL BOARD: MAJOR
MANAGEMENT AREAS

1. Budget Process:	1.1	Preparation
	1.2	Control
2. Accounting Function:	2.1	Accounts Payable
	2.2	Accounts Receivable
	2.3	General Accounting
	2.4	Payroll
3. Supply Function:	3.1	Purchasing
	3.2	Stores/Inventory
	3.3	Printing Services
4. Accommodation Supply:	4.1	Capital Projects
	4.2	Facilities Inventory
5. Plant Operations & Maintenance:	5.1	Operations
	5.2	Maintenance
6. Transportation:		
7. Personnel Administration:	7.1	Salary Administration
		- Job Evaluation/Description
		- Payroll
		- Benefits
	7.2	Personnel Allocation
8. Staff Development & Relations:	8.1	Development
	8.2	Relations
	8.3	Evaluation
		- Academic
		- Non-academic
9. School Curriculum (Program):	9.1	Development & Evaluation
	9.2	Operations
10. Special Student Services:	10.1	Special Education
	10.2	Attendance
	10.3	Psychological Services
11. Continuing Education:		
12. External Relations:	12.1	Ministry Reports:
		June Board Report
		Financial Report
	12.2	September School Report

that these areas do not necessarily reflect departmental units within the system, but rather define management functions, many of which may cut across budgetary boundaries.

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

Analysis of the Major Management Areas: First Level

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

Many of the initial interviews to collect the data required at this stage were conducted by the Peel members of the Task Force, using a standardized data sheet. This approach was successful in introducing key board officials to the details of the study, and in gaining their commitment to it. Due to the time constraints of overburdened key Board officials, OISE staff conducted a series of concentrated follow-up interviews to complete this stage of the

study. The preliminary outcomes of these interviews for each major management area were then validated by the officials involved. These activity analysis sheets were then used to develop flowcharts of the main processes in each major management area. These too were validated and updated by the relevant staff members. The finalized activity analysis documents are presented in Appendix B, and the flowcharts in Appendix C.

Analysis of Major Management Areas: Second Level

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

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

C. Analysis: Outputs

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

The second level analysis consisted of detailed analyses of each step in the process, as outlined in the first level analysis. To illustrate this, step 2 in the overview document (Table 2) has been selected: "Prepare school requests". Table 3 presents the breakdown of the activities involved in the preparation of school budgetary requests from the Field Office. Ten steps are listed in the process, along with their inputs and outputs. Input is defined as the information necessary to carry out the step. The source of the input information is noted on the document. On the output side, not only information, but actions or consequences of the step are itemized, along with their timing. The personnel with major responsibility for each step in

TABLE 2
 MANAGEMENT AREA: BUDGET PREPARATION

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

FIGURE 2
BUDGET PREPARATION

1.1

1 of 2

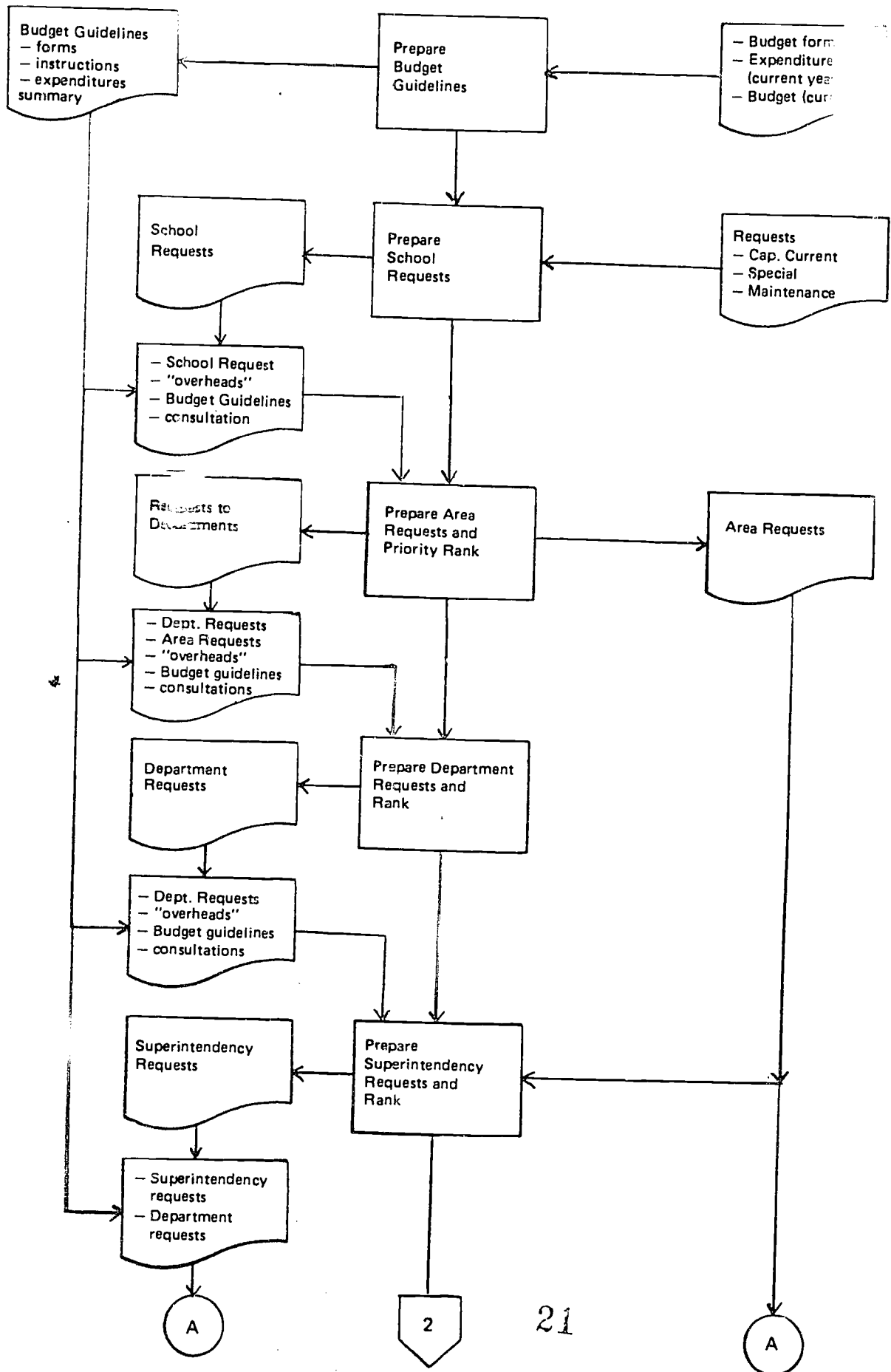
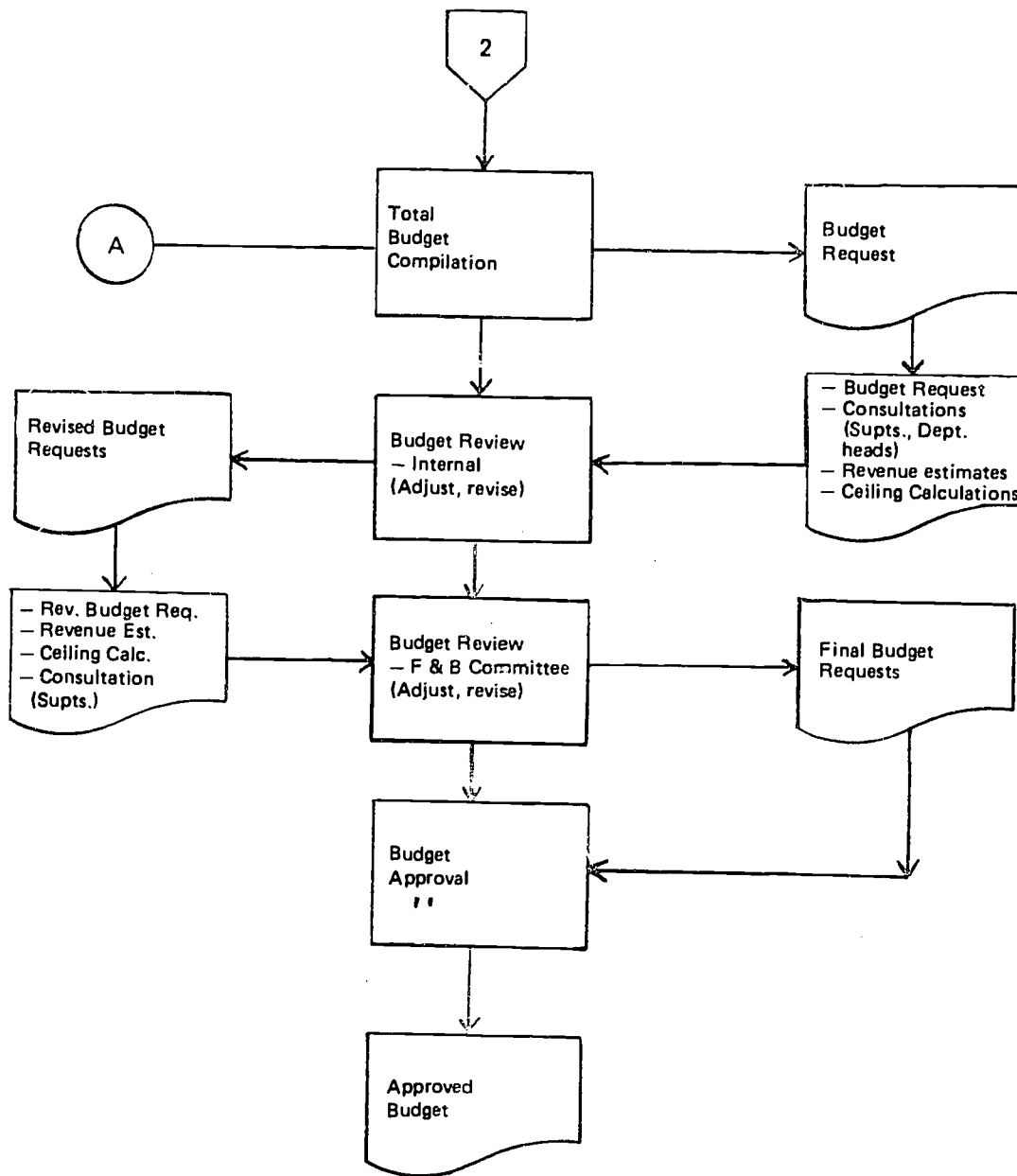


FIGURE 2
1.1 (cont'd)



the process are also listed on this document. Figure 3 presents a flowchart based on this detailed activity analysis. Again, the flowchart allows for easier understanding of the flows of information with respect to the activities in the process.

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

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

TABLE 3

DETAILED PROCEDURE
ANALYSIS

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

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare description of Budget Categories and Instructions	Previous Budget Documents Directives from Central Office		Description documents	Oct.	Field Supt.
(a)	Set upper limit on cap. current and replacements	Board per pupil and allocation policy Enrollments (current Conditions & Needs of Individual Schools	Planning Budget Schools Schools	Part of Description Document	Oct.	Field Supt.
2	Cap. Current & Replacement and Supplemental Budget prepared by schools	Description Document		Requests + % of allocable to non-allocable of Cap. Currents (Purchase Requisition Form)	A.N.A. after Jan.	School Principal
3	Meeting of Field Supt. with Principals for clarification, etc.				Oct. (ca. 1 week after description sent out)	



TABLE 3

DETAILED PROCEDURE
ANALYSIS

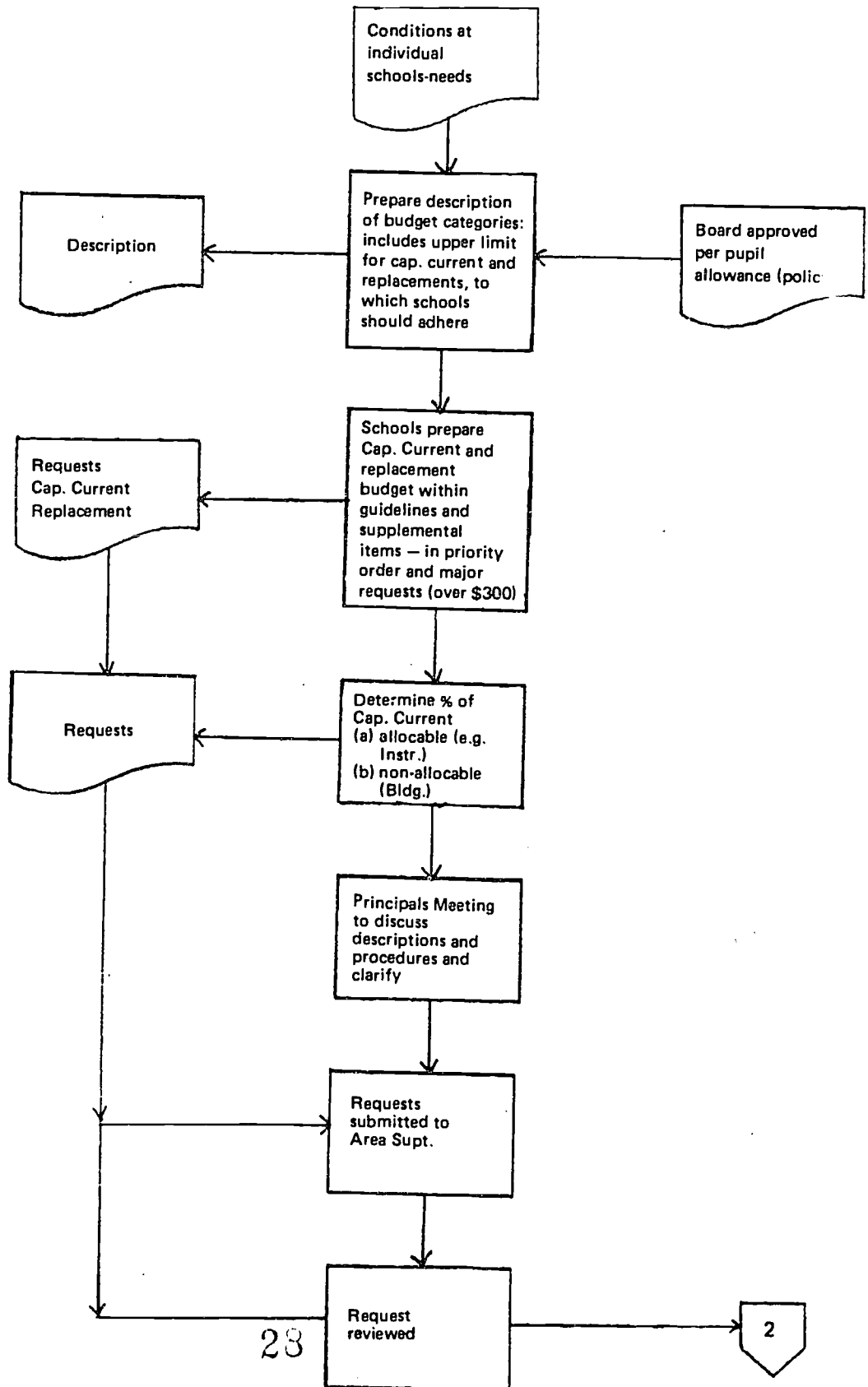
AREA: 1.1.2.1 BUDGET PREPARATION (Cont'd) COMPONENT: SCHOOL REQUESTS FROM FIELD OFFICE

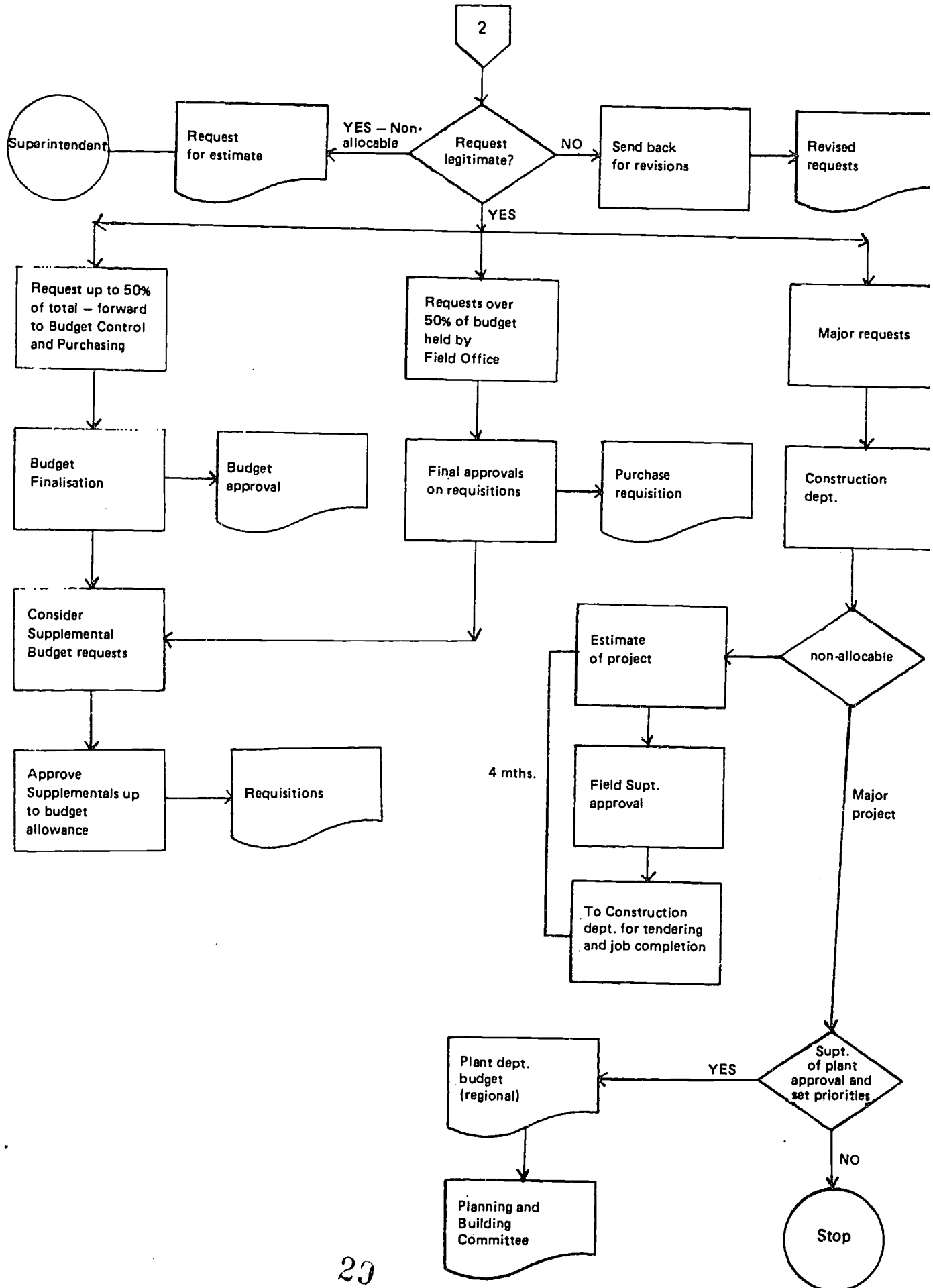
- OBJECTIVES: 1. _____
2. _____
3. _____

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

FIGURE 3

1.1.2.1 BUDGET PREPARATION: School Requests From Field Office





D. Synthesis: Information Structure

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

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

These are - the Provincial program and financial resource agencies;

- the board teaching and support staff;
- the suppliers of goods and services from outside the school system.

The three levels of decision-making are represented by the three main concentric circles in the diagram: the outer circle represents operations and operational control, the middle one management (tactical) control and the central core houses activities concerned with strategic planning. At the centre of system is the area of "Board

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

The synthesis provides the general design of the Board's information structure. It relates user needs to information and its flows throughout the system. It is from this frame of reference that specific information requirements can be defined for the system as a whole.

Table 4 summarizes the relationship between the management areas and clusters of information as defined on Figure 4, in terms of the principal sources of information used by each area. Locations in the table marked with an asterisk denote a potentially useful information source not currently used by the management area indicated. Table 4 provides, along with the synthesized flowchart, the basis for the specific design of data files for the information system.

TABLE 4: INFORMATION SOURCE MATRIX

Management Areas	Information Categories														
	Personnel Admin.	Staff Placement	Staff Development & Evaluation	Accounting Files: (a) Payroll (b) Other	Stockroom Inventory	Purchasing & Suppliers Files	Plant & Facilities Files	Transportation Data	Continuing Education Registration Data	Special Services Files	Decentralized, Individualized Student Files (e.g. OSR)	Aggregate Student Enrollment, Distribution & Scheduling Files	Current Program Monitoring & Evaluation	Timetables, Schedules	Departmental/Field/School Office Files
1.0 BUDGET PROCESS:															
1.1 Preparation				X				X	X						X
1.2 Control					X	X									X
2.0 ACCOUNTING FUNCTIONS:															
2.1 Accounts Payable				X											
2.2 Accounts Receivable				X							X				X
2.3 General Accounting				X			X								
2.4 Payroll Distribution				X											
3.0 SUPPLY FUNCTION:															
3.1 Purchasing				X		X									X
3.2 Stores					X										X
4.0 ACCOMMODATION SUPPLY:															
Capital Projects							X					X			X
5.0 PLANT OPERATIONS & MAINTENANCE:															
5.1 Operations				X	X	X									X
5.2 Maintenance				X			X								X
6.0 TRANSPORTATION:								X		X	X			*	X
7.0 PERSONNEL:															
7.1 Administration	X			X											X
7.2 Allocation	X	X	X									X			X
8.0 STAFF DEVELOPMENT & RELATIONS:															
8.1 Development			X												X
8.2 Relations	X	X	X												X
8.3 Evaluation	X		X												X
9.0 SCHOOL CURRICULUM:															
9.1 Prog. Devel. & Eval.													X		X
9.2 Operations		X					*					X	X		Y
10.0 SPECIAL STUDENT SERVICES:															
10.1 Special Education		X	X							X	X				X
10.2 Attendance										X	X				X
10.3 Psych. Services										X	X				X
11.0 CONTINUING EDUCATION:															
11.1 Adult	*		X	X			*	X						*	X
11.2 Summer School			X				*	X				*	X	*	X
11.3 Other								X							X
12.0 EXTERNAL RELATIONS:															
June Board Report		X		X	X			X		X		X			X
Financial Report				X								X			X
Sept. School Report		X	X							X	X	X	X		X

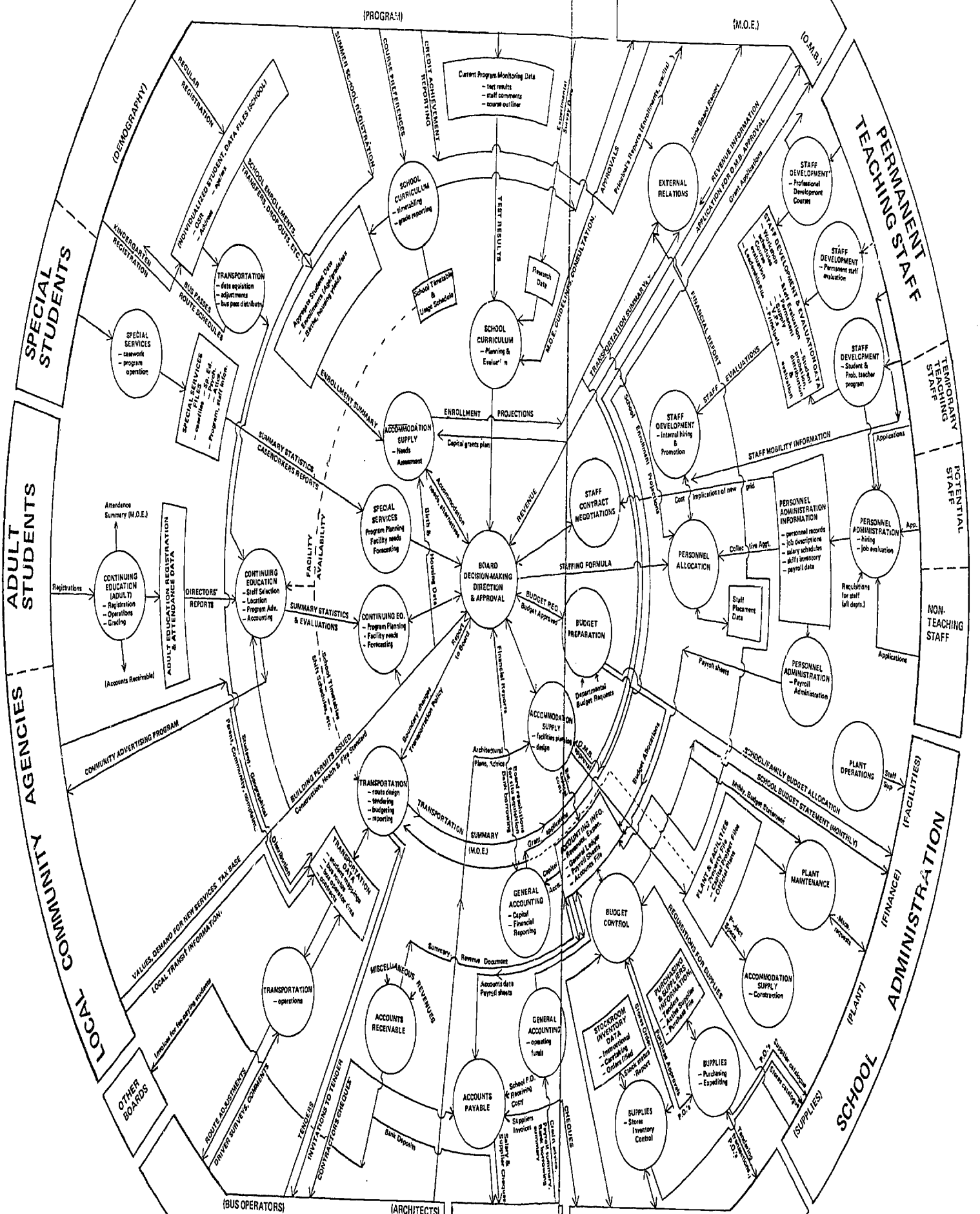
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34

REGULAR STUDENTS

PROVINCIAL AGENCIES

FIGURE 4



RESULTS OF THE STUDY

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

RECOMMENDATIONS FOR USES OF RESULTS

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

and functions occur within these management areas, so that they will continue to provide a detailed, up-to-date analysis of Board operations and information requirements.

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

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

To the Planning Department, the outcomes of the study provide a unique overview of the range of Board operations. Since the

planning function relates to activities which cut across departmental lines, the perspective provided as a result of this study can be useful in identification of areas where the Planning Department can provide inputs for procedural designs, or which can provide useful information for planning purposes.

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INFORMATION SYSTEM: ANALYSIS FOR THE

PEEL BOARD OF EDUCATION

Volume II: Technical Appendices

Susan Padro

March 1977

EA 013 469

Vol. II

"PERMISSION TO REPRODUCE THIS
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TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

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

Appendix A

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

Appendix B

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

It must be noted that in some cases, a detailed procedure analysis document was not prepared for each component listed in the overview document. This may be due to the following reasons:

1. The overview document is sufficiently detailed, so that a detailed document for certain steps would be redundant.
2. Detailed flowcharts were prepared directly at the interviews, omitting the intermediate step of completion of the analysis document.

Appendix C

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

APPENDIX A

PRELIMINARY OVERVIEW OF DEPARTMENTAL OPERATIONS

LEVEL 1 MEETING: SCHOOL PROGRAM DEPARTMENT

(1) OVERVIEW

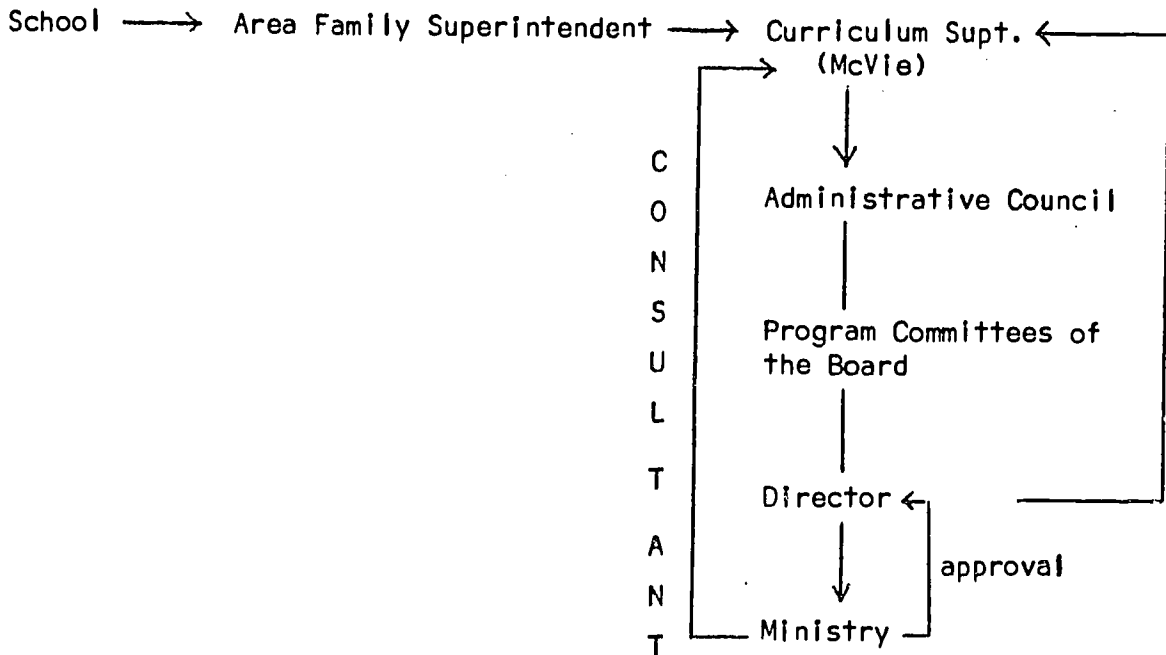
Superintendent of School Program: W. Douglas McVie

(a) Major Areas of Responsibility:

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

(b) General

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



(2) MAJOR FUNCTIONS WITHIN EACH AREA

1. - Curriculum Development (Doug McVie)
 - 1.1 - Interpretation of Ministry curriculum guidelines for schools' use.
 - 1.2 - Monitoring school programs:
 - cataloguing secondary courses/programs and elementary program descriptions.
 - approving all new courses/programs (esp. 'experimental' programs) prior to Board and Ministry submission.
 - evaluating new courses/programs.
 - 1.3 - Provision of guidelines for school program development:
 - minimum course content
 - program rationalization
 - program objectives
 - 1.4 - Curriculum resource development:
 - non-certified 'teacher' resources for special programs
 - media/learning resources: guidelines for acquisition.
2. - Professional development (Charlie Brown)
 - 2.1 - Teacher in-service program development:
 - perceive and anticipate teachers need in the field
 - disseminate, interpret Board and Ministry guideline releases.
 - leadership training
 - communication skills
 - 2.2 - Liaison with teacher training institutions.
 - 2.3 - Teacher courses and conventions: Catalogue and disseminate to schools lists of relevant courses and conventions.
3. - Education program research. (Judy Spigel)

- 3.1 - Monitoring of Questionnaire Type Studies:
- general concern in the areas of curriculum, school program, etc.
 - Ministry-Initiated studies cover students, teachers, parents.
 - Internally initiated studies would look into areas such as:
 - sex, drugs, alcohol
 - open area
 - French
- 3.2 - Testing of Core Curriculum
- administration of standardized tests across the system
 - data bank of test results has been generated but there is some difficulty to retrieve centrally (IBM).
4. - Priorities
- 4.1 - Aid to teachers where none has been available before -- i.e. professional development probably most important as a result of curriculum changes.
- Inservice for all teachers in a given area - i.e. universability of coverage in a specific area.
- 4.2 - Evaluation of outputs of schools, e.g. what is the impact of the schools on the youth.
- 4.3 - French Immersion program

March 5, 1974

LEVEL 1 MEETING: PLANNING DEPARTMENT

(1) OVERVIEW

Superintendent of Schools (Planning and Development): Bill Lambie

(a) Major Areas of Responsibility

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

(b) General

- 1 - The Objective of the Planning Department is to:
 - develop planning information, and
 - assist in developing good criterion-referenced, consensus decision processes
- 2 - Role of Planning Department
 - The Planning Department currently is considered to be a short term function to:
 - analyze needs and design
 - act as a service and control function
 - serve as a training function
 - concentrate in the areas of facilities, contingency, evaluation and setting of objectives
 - the planning role will later be filtered down to other departments where it will be part of the on-going operations.

(2) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Enrollment Projections

- the development of expertise in enrollment projection is viewed as functional to the planning process - (refer to Bill Lambie's paper on Objectives of the Planning Dept., April 1, 1974)
- good enrollment projections allow for more accurate analysis for almost the whole spectrum of problem-areas in the system,
 - e.g. - capital construction allocations
 - boundary changes
 - site location
 - facilities planning
 - transportation
 - budgeting, etc.
- requires organization and good communications with the other groups in the system

2 - Budget Reporting

- current involvement in the design and implementation of a new Budget reporting system
- Bill Lambie (Planning) is responsible for the design of the new system and Bill Keith (Finance) will take over the control aspects when developed
- objective of the system is the development of revenue/resource needs and information regarding costs of projects or studies.

3 - Contingency Planning

- anticipate and develop effective strategies for coping with specific contingencies that may arise
- part of the approach is to develop information for different simulations.

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

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

- (3) PERSONNEL
 - organizational structure and staff to be obtained at later meeting

- (4) PRIORITIES
 - Budget Reporting System
 - Enrollment Projections and the methodology and organization associated with the role of enrollment projections for planning.

April 4/74

LEVEL 1 MEETING: BUILDING AND PROPERTIES

Superintendent of Plant: (Derek Wilkinson)

(1) OVERVIEW

Major Areas of Responsibility

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

(11) MAJOR FUNCTIONS WITHIN EACH AREA

(a) 1 - Design and Construction

Supervisor of Design and Construction: (Harley Phillips)

- has 1 assistant and 2 technical assistants
 - his job is to convert educational briefs to reality
 - must get Ministry and O. M. B. approvals
 - recommends architect to Superintendent of Plant for Board approval
 - tenders contract
 - site supervision of construction
 - recommends approval of progress payments
- 1.1 - Site Selection (D. Wilkinson, J. Greeniaus, H. Phillips)
- planning dept. chooses locations and is concerned with obtaining approval of need from the Ministry
 - buildings and property people rule on the suitability of the location
 - currently the County owns ninety sites

1.2 Plans/Specification (new Construction)

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

2. Maintenance and Operations (Jim Ellison)

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

3. Caretaking

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

(b) Breakdown on Activities by Budget

- 1 - current: repairs
- 2 - Capital/current: alterations, programmed upgrading of facilities, i. e. fire standards, lighting levels, etc.
- 3 - capital: new construction

(111) PERSONNEL

- (a) Organization chart pending
- (b) Responsibilities: Defined in Section (11)

(IV) PRIORITIES

- 1 - all three major areas of responsibilities have approximately the same priority except that there is a tendency to emphasize Design Construction
- 2 - all current projects and needs
- 3 - data bank project

March 21/74

LEVEL I MEETING: PERSONNEL DEPARTMENT

(1) OVERVIEW

Department Head: R. Steadman

(a) Major Areas of Responsibility

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

(b) General

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

(11) MAJOR FUNCTIONS WITHIN EACH AREA

- 1 - Recruitment, Transfers & Separations of Non-Teaching Staff
 - 1.1 - Recruitment: (Mrs. Chapman/Mrs. Ward)
 - office and secretarial staff - (Mrs. Chapman)
 - supervisory and administrative staff)
 - custodial and maintenance staff)
 - lay help (A.V. technicians)) (Mrs. Ward)
 - 1.2 - Transfers:
 - arrange suitable transfers
 - CUPE involved
 - all processing done by the personnel dept
 - 1.3 - Separations:
 - process termination and inform payroll
 - conduct exit interviews for staff who leave voluntarily
- 2 - Teacher Recruitment (S. Pawloski /S. Colbert/Pat Morgan)
 - 2.1 - Recruitment:
 - request from principal for new person; (need for new teachers established by Mr. Dobson)
 - Advertisement placed in newspapers
 - all applications sent to principal and area superintendent whether in answer to an ad or a drop-in at the central office
 - appointments must be approved by Mr. Dobson and the Board; information must be sent to Mr. Dobson for this purpose
 - following approval, all processing done by the personnel dept
 - e.g. - acceptance of position form prepared, signed, etc.
 - personnel dept must approve of the salary arrangements (initially determined by Sharon Pawloski and Pat Gordon)

- 2.2 - Transfers/Terminations:
- transfers processed by personnel dept
 - process terminations and inform payroll
- 3 - Salary Administration (Rick Meade)
- position descriptions
 - job evaluations (e.g., determination of salary range)
 - classification of positions; nb. CUPE negotiates classification for all office, clerical, personnel lay assistants
 - salary surveys
 - administration and interpretation of teaching and non-teaching salary schedule
 - payroll documentation
- 4 - Employee Benefits and Safety (TBA)
- administration of group insurance plans
 - workmen's compensation
 - liaisioning with Insurance Companies
 - providing statistical data - a report prepared manually on a regular basis for Insurance Co.
 - benefit counselling of teaching and non-teaching staff (priority item)
- 5 - Performance Appraisal, Promotion, Organization (R. Steadman/Lloyd Dobson)
(in cooperation with line management)
- assessing performance:- Chiefly non-academic personnel
 - Steadman evaluates non-academic personnel
 - Dobson evaluates teaching personnel

- recommending promotions
 - recommending organizational changes
 - suggest policies of constructive discipline
- 6 - Negotiations (Resource Department for Board) (R. Steadman)
- act as resource people to the Salary and Staff Relations Committees of the Board since administration has no authority to speak for the trustees. e.g., Steadman & Townsend provide liaison between personnel and academic affairs
 - provide statistical data and advise on salaries, costs, policies and procedures to Salary Committee and Staff Relations Committee (Mrs. Pawloski)
 - liaison with Chairman and members of staff negotiating committees
 - Steadman - member of salary committee acting as resource person.
- 7 - Collective Agreements (R. Steadman)
- administer provisions
 - conduct grievance hearings for non-academic staff
 - suggest revisions in content and language (in new agreements)
- 8 - Training and Development: Non-teaching staff
- staff induction
 - safety training
 - supervisory training
 - staff development
- 9 - Communications and Counselling (R. Steadman)
- communications with staff
 - provide information of changes in legislation, Board policies and other matters of mutual consent

- provide counselling services on request on job opportunities and personnel problems relating to work situations
 - liaise with line staff and supervisors, principals, superintendents, etc. to determine needs and provide service
- 10 - Personnel Records (Mrs. Ward/Mrs. S. Pawloski)
- Request, receive and maintain in confidence comprehensive records on all employees, i.e., official files:
 - duplicate (may be triplicate) files on teachers; area office and schools may also have copy
 - file locked and restricted to all
 - accessed only with people in personnel dept

(III) PERSONNEL

(a) Organization chart: pending

(b) Responsibilities

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

(IV) PRIORITIES

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

March 21, 1974

LEVEL 1 MEETING: FINANCE

Superintendent of Administrative Services: Bill Keith

(I) OVERVIEW

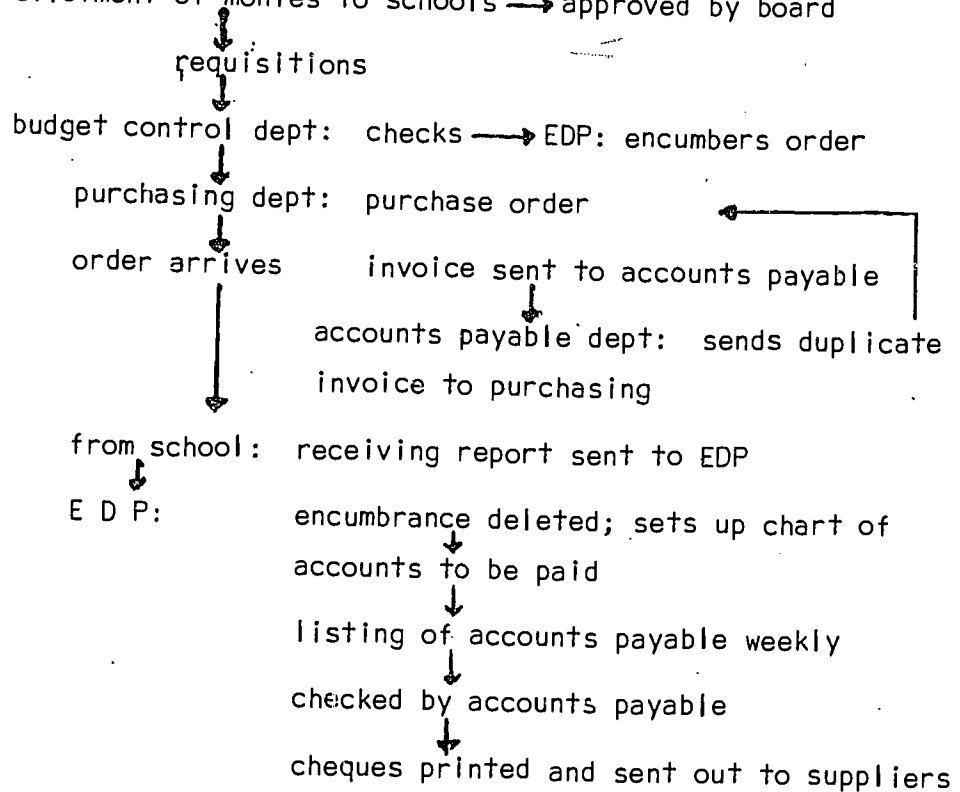
(a) Major Areas of Responsibility

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

(b) General

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

Budget: allotment of monies to schools → approved by board



(11) MAJOR FUNCTIONS WITHIN EACH AREA

- 1 - Budget and Expenditure Control (Shirley Harrison/Ken Dudman - chief accountant)
 - 1.1 - Budget Control:
 - board establishes budget
 - finance people control expenditures to keep within the budget
 - budget officer clears all encumbrances to budget after items received and charged to accounts payable
 - 1.2 - Budget Process:
 - contribution is primarily one of inputs to the process
 - i.e. - provision of historical data
 - information on ceiling and revenue via liaison with the planning academic people, enrollment projections, with ministry on available funds, other sources.
 - 1.3 - Accounts Payable:
 - weekly listing of accounts payable - EDP
- 2 - Revenue (Ken Dudman - chief accountant)
 - 2.1 - Accounts Receivable:
 - primarily billings for community use of schools
 - 2.2 - Acquisition:
 - ensure maximum benefit from provincial aid; i.e., find existing sources of revenue and utilize them.
 - revenue from fares, etc.
- 3 - Payroll (Marion McDonald)
 - EDP operation
 - linkage with personnel dept. (espec. fringe benefits)
- 4 - Purchasing (P. Porter)
 - 4.1 - Inventory:
 - this includes the operation of the warehouse and stockroom

4.2 - Courier Service:

- deals with the distribution from warehouse to schools, etc.

4.3 - Printing Shop:

4.4 - Service:

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

(III) PERSONNEL

1 - Organizational chart is pending

2 - Responsibilities

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

(IV) PRIORITIES

1 - Annual budget to the Board, to the Ministry

2 - functioning financial system for 1974 - especially payroll system

3 - systems development for financial system

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

(V) NOTES

1 - GEAC:

- no documentation, no run schedules
- no run manual to determine how to extract information
- insufficient programming ability
- ad hoc operation

- 2 - Budget:
 - '74 system expanded to allow budget accounts to be broken down by dept. and families
 - new account numbering causing problems in bringing EDP system up to date
- 3 - EDP Operation:
 - payroll
 - accounts payable; weekly listings
 - general ledger: expenditure accounting, including encumbrance system

April 4, 1974

LEVEL 1 MEETING: TRANSPORTATION

- 1 - Organization:
 - J. Brown: Superintendent of Business Affairs
 - Enid Britten: South Area Business Officer
 - Willa Woodill: North Area Business Officer
- 2 - General
 - contract buses; 1½ mill expenditures
 - 11 contractors, 170 buses
 - own 2 buses
 - route design - plot with pins on map
- 3 - Bus Contracts
 - tender on number of buses, not students; number of students used to determine the number of buses
 - contracts let
 - routes redesigned and assigned
- 4 - Operations
 - 4.1 - Regular Runs:
 - have list of bussed students but is not up-to-date except for periodic head counts; list is prepared in October
 - list of special education kids always up-to-date
 - small operators handle their own routes, complaints, etc
 - otherwise complaints, regular transportation problems, etc. handled by Enid Britten
 - policy:
 - under 2 miles 'no bussing' except for
 - danger areas, illness, and K to 3 for Dec to Mar if greater than 1 mile

4.2 - Special Runs:

- special or extra runs over and above contractual tender
 - e.g. - kindergarten
 - home economics run
 - special runs to the city for the handicapped
 - leave morning, return afternoon
 - mini buses deliver students to embarkation point and 2 buses deliver students to the city

4.3 - Taxis:

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

5 - Grants:

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

6 - Problem Areas

- would like information from Special Education people earlier
- poor communication when migration - from principal
 - from spec. ed.
 - from parents
- where classes are set up.

March 13, 1974

LEVEL I MEETING: COMPUTER OPERATIONS

Murray Skinkle

(I) OVERVIEW

(a) Major Application Areas

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

(b) General

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

(II) MAJOR FUNCTIONS WITHIN EACH AREA

- 1 - Financial Systems (B. Keith)
 - 1.1 - Purchase Order - Routine: (P. Porter)
 - Responsibility of the purchasing dept.
 - 1.2 - Payment of Invoices - Routine: (B. Keith)
 - Account Payable Dept
 - 1.3 - Journal Entries - Routine: (Ken Dudman)
 - Budget/Accounting

- 1.4 - Trial Balances - Routine: (Ken Dudman)
 - Accounting Dept
- 1.5 - Ministry Reporting: (Ken Dudman)
 - Accounting Dept
 - Not a program but uses the output from the other routine to prepare the report
- 1.6 - Inventory Control or Stores Order: (M. Skinkle/P. Porter)
 - under development; target date Sept/74
- 2 - Payroll (Marion McDonald)
 - cheques produced via master program
 - new employee routine - create new records
 - proposed development of a new Payroll/Personnel file (B. Steadman)
Ministry has tapes on all teachers' certification
 - The following reports and routines to produce them are given below:
 - TD4 routine
 - Superannuation routine
 - OMERS: Ont. Munic. Employees Retirement System (i.e., non-teaching pension plan)
 - UIC routine
 - Group Life Ins. routine
 - Taxable Benefits
 - OHIP
 - Distribution: distributes pay according to function or panel charged to

- Calculation of pay) for negotiation purposes, update of
)
- Payroll grid) new salary levels, etc.

3 - Tests (M. Skinkle)

- Scheduling program)
-) GEAC
- Mark Reporting - as of Sept 1/74)

4 - Scheduling Reports (M. Skinkle)

- secondary teacher analysis wrt periods, number of students
 taught, free-time, etc.
- program analysis by school, by superintendent, by board

(III) PERSONNEL

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

(IV) PRIORITIES

- Priorities for the various applications are (1) Financial System, (2.a)
 Inventory control, (2.b) Scheduling, (3) Payroll, (4) Mark Reporting

March 28/74
 April 23/74

LEVEL 1 MEETING: SPECIAL (Student) SERVICES

(I) OVERVIEW

Superintendent of Special Services: Bill Quance

(a) Major Areas of Responsibility

1 - continuing Education Services

2 - Psychological Services

3 - Attendance Counselling

4 - Special Services

(b) General

1 - The linkage between the areas is that they all are outside the normal range of services

2 - The orientation is countywide rather than school level

3 - Decentralization is occurring, consequently all field representative now answer to the field supervisors. The central officers (with the exception of Continuing Education) act as consultants to the field office

4 - Special Education is a service and not a discipline, deals with kids, teachers, parents, professional groups, etc.

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Continuing Education (Walter Ward)

1.1 - administration of night school (ca.8000 registered)

- summer school, both elementary and secondary (ca.3000 registered)

1.2 - handle referrals of drop-out students for follow-up

- alternatives to education geared towards drop-outs or potential drop-outs (ca.125 stud)

- 1.3 - holiday travel/excursions:
 - mechanism for screening travel agencies:
 - credit travel program:- credit course on trip abroad
 - carried out by Peel teacher staff overseas
 - usually summer school
- 1.4 - training of parent volunteers (elementary schools)
- 1.5 - coordination of correspondence schools; tutors available; use Ministry's correspondence courses
- 1.6 - liaison with community organizations
 - e.g. community colleges to prevent overlap
 - General Council of Children's Services - representation by Board
 - regional gov't will help coordination
- 1.7 - career's orientation (Ernie Nielson); work experience and courses for credit
- 2 - Psychological Services (Ashton McKinell)
 - 2.1 - Traditional Function
 - psychological diagnostic service - learning difficulties due to psychological or learning disabilities (ca. 2 1/3 - 3% of student population)
 - make recommendations on instructional procedures
 - referral by principal, teacher or parents; written report accompanied by verbal discussion
 - 2.2 - Home-School Liaison Function
 - for kids who require more intensive services
 - referred to community agencies with feedback
 - 2.3 - General Consultative Service
 - the above 2 areas are treatment oriented, this area has impact

- on the whole system wrt all kids, with object of prevention
- workshops for teacher groups (primarily A. McKinell)
 - evaluation techniques; curriculum development
 - various committees
 - e.g., Curriculum Development Council - trends, needs, implementation
 - Primary Education Task Force
 - Testing and Evaluation Program Committee - 3 to 4 year
periodicity for
county programs

2.4 - Volunteer Groups

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

3 - Attendance Counselling (Mrs. DesRoches)

3.1 - Counselling Services

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

learning conditions of a child.

3.2 - Provincial Courts (Family Division)

- usually attendance problems - problems with parents
 - unmanageable children
 - etc.

3.3 - Liaison with Home, School and Community Agencies

- team approach, mixed disciplines
- Children's Aid, Public Health Nurse, Peel Family Services, etc.
- refer to "Annual Report of Attendance Counselling Service for 1972-73".

3.4 - Early School Leaves

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

4 - Special Services (Bill Quance, Bob King)

- special services is basically an accounting system for students in special programs

4.1 - Evaluation

- selection made by principal
- lack of resources requires principal to make evaluations and selections as to who will enter programs - special ed programs, summer school
- rank priorities on children entering programs
- psychological services and principals send data on child to Bill Quance (e.g. evaluation form submitted by principal)
- problem is lack of space; lack of data on teachers with special ed certificates
- nb: could use teacher file and computerized student cards.

4.2 - Budget Control

- need budget control to ensure money is used for special ed purposes; this money should be differentiated from the regular grant per student
- need monitoring to ensure money goes for what it was originally intended; this is the area superintendent's responsibility
- 1,500 vocational; 240 retarded; 1,400-1,500 in elementary; at least 3/4 of these schools have special ed program.

4.3 - Teacher Hiring

- make recommendations on teacher hiring

4.4 - Facilities

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

4.5 - Transportation

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

(III) PERSONNEL

- Bill Quance has 4 people working for him. Their responsibilities are defined in Section (II).

LEVEL I MEETING : FAMILY OF SCHOOLS

I. OVERVIEW

(a) Major Areas of Responsibility

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

(b) General

Family of Schools

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

II. MAJOR FUNCTIONS WITHIN EACH AREA

I. - Relationship with the Office of Academic Affairs.

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

I.1 - Coordination and Supervision of the activities of the Family of Schools.

- The Superintendent of Academic Affairs (M. Townsend) supervises and his assistant (Lloyd Dobson) coordinates the activities of the Family of Schools.
- L. Dobson chairs regular meetings of Superintendents - generates information.

I.2 - Evaluation and reporting to the Director on the performance of the Superintendent of Family of Schools.

- Lloyd Dobson chairs a committee to look at performance review, and develop a pattern relating to salary.

1.3 - Implementation of the Philosophy of the Board at the School Level.

- The Director is to develop a set of priorities based on the objectives of the superintendents.
- i.e. each family establishes its own objectives and the results are evaluated at the year's end.

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

- The emphasis in the Family of Schools: The Superintendent operates in a "democratic" fashion - feeling of "family."
- This has been done in capital expenditures, but may also go into staffing, programming, etc.

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

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

2.2 - Professional development within the Family of Schools.

2.3 - Community Relations with:

- local trustees
- parents

2.4 - Control of Conference and Workshop Budget.

2.5 - Liaison: with other families, teacher groups.

2.6 - Evaluation of Principals:

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

3. - Staffing/Hiring

3.1 - Staffing:

- Staffing requirements are based on enrolment projections supplied by the planning department and which may be modified by the Academic Affairs Office.
- Must operate within the pupil/teacher ratio set by the Board; included in the ratio are non-teaching personnel, special education and special teacher pools.

- The number of staff for each Family is determined and then the enrolment and staffing figures are given to each Superintendent of a family who then distributes and assigns his staff at his discretion.

3.2 - Hiring:

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

4. - Leadership/Development/Promotion

4.1 - Promotion:

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

4.2 - Leadership Development:

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

5. - Support Services

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

- Maintenance Supervisor; phys ed; etc.
- Business Officer who is responsible to the Superintendent of Business Affairs but is housed at the field office level.

6. - Budget

- Superintendent of Family of Schools responsible for budget for field office budget and review of Principal's expenditures.
- Assures it reflects the priorities of the schools art programs, etc.
- There are two main budget categories: capital current and consumable supplies.

6.1 - Capital Current:

- Distributed to schools by the field offices.
- Equipment purchases
- Minor renovations; (structural change requires approval from the central office, i.e. the Plant Office)
- Special expenditures for large items can be skimmed of the top for the Family of Schools needs.
- Alloted to an area on a per pupil basis.
- Superintendent of Schools has flexibility in allocation to specific schools.
- Formula recommendation goes through Academic Affairs and Business Office jointly.

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

6.2 - Consumable Supplies:

- Schools receive a global budget based on a formula.
- Principal spends it to reflect priorities.
- Superintendent of Family monitors this spending.
- Also the Superintendent receives a small allocation to provide flexibility for special programs.

III. PERSONNEL

- Office of Academic Affairs:

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

- Family of Schools:

There are 10 Superintendent of Schools (Family of Schools)

April 9, 1974

LEVEL 1 MEETING: SUPERINTENDENT OF ACADEMIC AFFAIRS OFFICE

(1) OVERVIEW

Superintendent of Academic Affairs: Marvin Townsend

(a) Major Areas of Responsibility

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

- 1 - Direction
- 2 - Program
- 3 - Assessment

(b) General

The superintendent of academic affairs has the following roles:

- (1) operational - in connection with Mr. Dobson; (2) leadership-e.g. coordinate the activities of all of the superintendents of schools. Currently the operational role is emphasized rather than leadership. Once the reorganization is over, the concentration will be on leadership;
- (3) interaction with Executive Committee and Board of Education (collectively/individually).

(1) MAJOR FUNCTIONS WITHIN EACH AREA

- 1 - Direction

1.1 - Major Direction:

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

Essentially a field oriented job.

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

1.2 - Staff Involvement:

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

1.3 - Evaluation:

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

for evaluation of the Superintendents of the Family of Schools.

1.4 - Leadership Program:

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

2 - Program:

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

3. - Assessment:

- meeting of 4 superintendents weekly for short term goals, immediate problems.

- long range planning re objectives is reviewed by this group

(III) PERSONNEL

(a) Organization

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

(b) Responsibilities

1. Lloyd Dobson

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

2. Bill Quance

- Superintendent of Schools (Special Services)
- directs chief psychologist, attendance counsellor; with his assistant B. King acts as a consultant, and with W. Ward deals with special educational services.
- the reorganization has altered his job; he now assists the Superintendents of Schools in an advisory, consultative role. Because of the decentralized new structure, his duties now are:
 - development of programs
 - development of professional development program, in service training, recruitment of staff (new).

- work in cooperation with and liaison with Superintendents of Schools
- less emphasis on operations and more on planning, policy and prof. development function in the area of special services.

3. Doug McVie

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

4. John Bailey

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

5. Bill Lambie

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

(IV) PRIORITIES

- 1 - Leadership Development:
 - growing role in the future - as effective strategy for introducing change in system
 - leadership role in education as a system rather than just school
 - change in system must be at grassroots level and reflect staff needs, attitudes, input.
- 2 - Emphasis on the human element of administration
 - must be aware that a large system can often be insensitive to many people's needs
 - personalize role and contact of senior officials vis-a-vis teachers essential

- 3 - Quality of Program:
 - monitoring function
 - fill needs of kids and requirements of parents, Board of Education.

(V) NOTES:

- 1 - Possible Information Needs
 - 1.1 - Staff Information - leadership
 - task force personnel
 - 1.2 - Facilities Inventory:
 - upgrading of facilities - need systemwide review to establish priority for program of upgrading; library/resource
 - 1.3 - Capability to Monitor School Expenditure: distribution of funds within family, within individual schools. Emphasis on physical rather than human resources.

May 14/74

LEVEL 1 MEETING: BUSINESS AFFAIRS

Superintendent of Business Affairs: Jack Brown

(I) OVERVIEW

Major Areas of Responsibility

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

(II) MAJOR FUNCTIONS WITHIN EACH AREA

1 - Supervision of Business Affairs

1.1- Functional Areas:

1.1.1- Directly report to the Superintendent of Business Affairs:

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

1.1.2- Superintendent of Business Affairs Accountable for:

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

1.2 - General

- general philosophy is that academic needs must be taken into account and not just a business approach *per se* (e.g., resource allocation

- based on academic needs)
- role of giving inputs to the educational program from the viewpoint of non-teacher
 - Integración of educational facilities with the community:
 - view of total needs of community served by education
 - integration of community agencies to meet needs
 - advisor to Planning Dept who has the formal responsibility in this area
 - Liaison with municipal agencies: knowledge of municipal personnel; contacts with municipal personnel retained; eventually Planning Dept will take over.
- 2 - Treasurer to the Board
- role of treasurer is to ascertain what the Board's eventual financial commitments will be
 - negotiate and purchase school sites from developers
 - liaison with the Ministry in obtaining financial resources.
- B. Keith is responsible for the administration of the money
- 3 - Executive
- executive role through membership on the executive committee and administrative council
 - Executive Committee:
 - director, academic officer, business officer
 - held at end of each administrative council meeting and on call
 - salary negotiations (excluding the Director)
 - personnel matters, appointments
 - delicate matters
 - Administrative Council:
 - executive committee members, auditor and all superintendents

- meet weekly
- anything to be presented to the Board is dealt with here first

(III) PERSONNEL

- 3.1 - Organizational chart: available
- 3.2 - Responsibilities
 - given in Section II

(IV) PRIORITIES

- 1 - all financial responsibilities
- 2 - provision of facilities and accommodation for growth needs

(V) GENERAL NOTES

5.1 - Linkages:

5.1.1 - Planning Department

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

5.1.2 - Field Offices

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

5.1.3 - Internal

- Plant: - design and construction people work together with Planning Dept
Maintenance and Caretaking Dept linked to Purchasing Dept
- Payroll: linkages to everybody
- Personnel: authorizes payroll changes
- Budgeting & Accounting: - administration of budget by field superintendents
 - business office controls capital expenditures

- Business Superintendent & Board:
 - strong linkage
 - Board expects information from J. Brown
 - formal information transmitted via reports by operational areas
 - Social linkages for good of Board:
 - Halton church extension council
 - Drug centre
 - Advisory Board of ERAS
- 5.2 - Critical Factors:
- School Trustees

June 5, 1974

LEVEL 1 MEETING: DIRECTOR'S OFFICE

(1) OVERVIEW

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

(a) Major Areas of Responsibility

1 - Relationship Between Senior Administration and Elected Officials

2 - Developing Objectives and Structure of the Organization

3 - Relationship with the Community

4 - Relationship with the Ministry

5 - Leadership Role

(b) General Comment

- The Director is not responsible for the actions of the Board; he is not the Board's spokesman; that is the responsibility of the Chairman of the Board

- The Director is responsible for the operations of the system and implementation of the Board's policy

(2) Major Functions Within Each Area

1 - Relationship Between the Senior Administration and Elected Officials

- most critical to develop an open relationship with trustees

- relationship between trustees and administrators is developed

through the following:

1.1 Standing Committees:

- Director ensures that these committees function properly;

- Members must be prepared for the meetings

- Assignment of staff as members of these committees are usually related to staff members' areas of responsibility

- 1.2 Regular Board Meetings:
- Director ensures that materials are prepared and sent to trustees in advance
- 1.3 "Working Partnership" Between Board and Administrators:
- Director's role to **protect** the staff in the face of the Board
 - Director **strengthens the** role of the staff
- 2 Developing Objectives and Structure of the Organization
- Director has greater objectivity due to lack of vested interest
 - takes responsibility for the organization as it is now designed and for its productivity
- 3 Relationship with the Community
- public relations, e.g., information to community organizations
 - explains what the Board is trying to do through the notion of "system", i.e., a common set of objectives for the organization as a whole.
 - public inquiries usually come to the Director first, who then decides how and who should handle the issue
 - Director tries not to be a member of any specific community committees, otherwise he would be inundated with these
 - the rapid growth of the county has led to a proliferation of committees and many well-organized interest groups
 - Director sits *ex officio* on **committees**
- 4 Ministry
- Director takes an active role when dealing with senior Ministry staff (i.e., Wells, Davis)
 - depending on the issue, will participate in occasional meetings with regional Ministry staff
- 5 Leadership
- issues arise which consume a great deal of time; often the Director has to react to a situation having too many unknowns.

- often required to speak to federations and associations; also invited to speak in the standing committees.
- active role in leadership development of staff; he is one of two members on committees dealing with potential leaders in the system.
- handles serious personnel problems, especially when confidentiality is required.
- chairs the Administrative Council: involves setting up the agenda, sharing of information, integration of all components.
- Director coordinates all major meetings in the system to reduce conflicts; most meetings held at night.
- Director is the executive member at the regular Board meetings and also sits in on any other meetings that have important agenda items.
- attends special functions.

6 Priorities

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

7 General Notes

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

- Director follows up on all Board resolutions
- ensure action is taken - a log of Board resolutions is kept.

APPENDIX B:

ACTIVITY ANALYSIS DOCUMENTS

MANAGEMENT AREA: 1.1 BUDGET PREPARATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Prepare budget guidelines	<ol style="list-style-type: none"> Budget format Expenditures - current year to-date Budget - current year 	<ol style="list-style-type: none"> Budget Guidelines -forms -instructions -expenditure summary (current year) 	Supt. of Finance
2	Prepare school requests	<ol style="list-style-type: none"> Cap-current requests Special requests Mtce. requests 	<ol style="list-style-type: none"> School requests 	School staff
3(a)	Prepare Area Requests, priority rank	<ol style="list-style-type: none"> School requests "Overheads" Budget Guidelines Consultation - Finance 	<ol style="list-style-type: none"> Area requests Requests to Departments 	Superintendents - Families
3(b)	Prepare Department requests, priority rank	<ol style="list-style-type: none"> Program requests - Dept. Program requests - areas "Overheads" Budget Guidelines Consultation - Finance 	<ol style="list-style-type: none"> Department requests (Forms BD-1, 1(a), 2(a)) 	Department Heads
4	Prepare Superintendency Requests, priority rank	<ol style="list-style-type: none"> Area requests Department requests "Overheads" Budget Guidelines Consultation - Finance 	<ol style="list-style-type: none"> Superintendent requests (Form BD-2) 	Superintendents
5.	Total Budget Compilation	<ol style="list-style-type: none"> Superintendent Requests Dept. and Area Requests 	<ol style="list-style-type: none"> Budget Request 	Superintendent of Finance
6 93	Budget Review - Internal (adjust, revise)	<ol style="list-style-type: none"> Budget Request Consultation - Supts., Dept. Heads Revenue Estimates Ceiling Calculations 	<ol style="list-style-type: none"> Revised Budget Request approved in principle) 	Admin. Council 94
7	Budget Review - F & B Comm. (Adjust, revise)	<ol style="list-style-type: none"> Revised Budget Request Revenue Estimates Ceiling Calculations Consultation - Supts. 	<ol style="list-style-type: none"> Final Budget Request 	F & B Committee
8	Budget Approval	<ol style="list-style-type: none"> Final Budget Request 	<ol style="list-style-type: none"> Approval Budget 	Board

DETAILED PROCEDURE
ANALYSIS

AREA: 1.1.1 BUDGET PREPARATION

COMPONENT: BUDGET GUIDELINES

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

2. _____

3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determination of Budget	Previous budget statements based on Code of Accounts	Forms	Budget Categories	Aug. 15	Budget Officer and Superintendent of Finance (Central Office)
		Program needs identified through feedback from Schools & Superintendents	Verbal			
		Policy Guidelines (Finance and Budget Committee)	Board Resolution			
2	Sequencing of budget forms	Budget Categories Priority determination		Budget preparation forms (Staff list) (Other components) (Department summary)	Sept. 1	Budget Officer and Superintendent of Finance (Central Office)
3	Preparing instructions	Budget forms		Instructions	Sept. 15	Budget Officer and Superintendent of Finance (Central Office)

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DETAILED PROCEDURE
ANALYSIS

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

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
	Prepare description of Budget Categories and Instructions	Previous Budget Directives from Central Office		Description documents	Oct.	Field Supt.
	Set upper limit on cap. current and replacements	Cap. per pupil and replacement policy Replacements current Provisions & needs of Elementary Schools	Planning Budget Schools Schools	Description Document	Oct.	Field Supt.
1	Cap. Current & Replacement Supplemental Budget prepared by schools	Application Document		Requisition Form + % of allocable to % of allocable of Cap. Currents Requisition Form	Nov. Dec. (ca. 1 week after description sent (cont)	School Principal
2	Field Supt. meets with Principals for discussion, etc.					

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

- OBJECTIVES: 1. _____
 2. _____
 3. _____

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

DETAILED PROCEDURE
ANALYSIS

AREA: 1.1.2.2 BUDGET PREPARATION COMPONENT: SCHOOL REQUESTS

OBJECTIVES: 1 - Prepare budgetary requests based upon budget allotment from Superintendent
2
3

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	<u>Cap-Current Requests:</u> Identification of major departments.	Requisition Form		School Administrative Team	when budget approved	
2	Formulation of School list of Priorities.					
3	Submission to Superintendent.					
4	Review of Submission by Superintendent.					
1	<u>Special Requests:</u> Request by Principals to Superintendent.	Requisition Form			immediately	
1	<u>Maintenance Requests:</u> Request by Principals to Superintendent.	Requisition Form			immediately	
1 2	<u>Supplies:</u> Principal allots budget. Department make requisitions.	Requisition Form			when budget approved	102

AREA: 1.1.3 BUDGET PREPARATION

COMPONENT: 3(a) PREPARE AREA REQUESTS

OBJECTIVES: 1. Preparation of Field Office Budget Request

2.

3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Description and Definition of Budget Categories Preparation	Previous Budget Documents Directives from Central Office	Field Office Central Office (Keim)	Description Document	Oct.	Field Office Supt.
2	Departments of Field Office Complete Forms	Description Document Assessment of Need: (a) Past Budget (b) Current experience (c) Projection of needs	Dept. Personnel (Field Office)	Standard Budget Form	Oct.	Field Office Personnel
3	Discussion and clarification of rationale for requests with Superintendent	Standard Budget Forms	Dept. Personnel & Supt.	Final Department Budget Request (Standard Form)	Oct.	Field Office Personnel & Supt.
4	Collation into Field Service Budget & Establish Priorities	Department Budget Requests (Final)		Field Office Request (Standard Form) Brief for Rationale of Budget Request	Nov. (early)	2 Supts. & Admin. Asst. (Field Office)

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DETAILED PROCEDURE
ANALYSIS

AREA: 1.1.4 BUDGET PREPARATION

COMPONENT: DEPARTMENT REQUESTS

- OBJECTIVES: 1. Completion of Form BD1(a), BD1 and BD2(a)
2. Establishment of priorities
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine staff Requirements	-Current Staff List	Staff file	BD1(a) completed	Oct.	Dept. Head
2	Complete Form BD1	-Number of New Schools	Board Minutes	BD1 completed	Oct.	Dept. Head
		BD1(a)				
		-Previous Years Budget	Approved Budget			
		-Expenditures to-date	Printout			
		-Anticipated inflation	Business Publications and supplies			
		-Anticipated needs	Age of equipment New projects current state of equipment			
3	Complete Form BD2(a)	BD1, BD1(a)		BD2(a)	Oct.	Dept. Head
4	Establishment of Priorities	-Board priorities	Supts.	Justification of expenditure to Superintendent	Oct.	Dept. Head
		-Job performance	Job descriptions		Oct.	Dept. Head
		Environmental Requirements				
		-Budgetary requests	BD1(a) BD1, BD2(a)			

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AREA: 1.1.5 BUDGET PREPARATION

COMPONENT: SUPERINTENDENT REQUESTS

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

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Compare area superintendents request with previous year	Area Supts. request Prev. years budget Projected growth or decline in students and staff Analysis of per pupil costs and % of budget	Area Supt. BD-1 etc Budget Office Plan Dept.	Approval, rejection or modification by Supt.	Dec.	Central Office
2	Submission of BD-2(a) to Budget Dept. for inclusion in draft budget	Back-up material from Budget forms BD-11 etc.	Supt.	For compilation into draft budget	Jan.	Central Office
3	Consideration of draft Budget	All budget documents	Budget Office	Submission of budget to Admin. Council and Staff Budget Comm.	Feb.	Central Office
4	Establishing priorities when reductions are required	Directive from Admin. Council on % or dollar reductions and from staff budget committee (specific suggestions re cuts)	Admin. Council Staff Budget Ctte.	Draft Budget recommended to Finance Committee	Feb.	Central Office

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AREA: 1.1.6 BUDGET PREPARATION

COMPONENT: TOTAL BUDGET COMPILATION

- OBJECTIVES: 1. Production of Total System Budget
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Check Budget Submissions for accuracy	Budget Forms Staff Lists Payroll and Accounting Records		Corrected Budget Summaries	Nov. 1	Budget Officer & Superintendent of Finance (Central Office)
2	Compilation of summaries into a Total Budget	Corrected Budget summaries		Total Budget Request (Expenditure Summary)	Nov. 15	Budget Officer & Superintendent of Finance (Central Office)

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AREA: 1.1.7 BUDGET PREPARATION

COMPONENT: _____

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	General Budget Overview Compilation	1. Budget Request 2. Consultation (at meeting) 3. Revenue Estimates 4. Ceiling Calculations	Budget Summary Form-- Keith Verbal Accounting Dept (based on Min. Forms)	General Budget Overview	Jan. 31	Supt. Finance & Budget Officer
2	Examination of priorities	General Budget overview Consultation of Supts., etc.		Priorities established	Feb. 7	Admin. Council
3	Revisions of General Budget Overview	Priorities General Budget Overview Consultation, etc. Salary Schedule Commitments		Revised Budget Request	Feb. 14	Admin. Council

AREA: 1.1.8 BUDGET PREPARATION

COMPONENT: 7 & 8* BUDGET REVIEW & APPROVAL

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Review of priority listings listings and resulting revised budget request	1. Revised Budget Request 2. Revenue 3. Ceilings 4. Consultation Priority Listings	Admin. Council	Recommend final Budget Request to Board	Feb. 21	F & B Committee
2	Examination of Final Budget to Board	Final Budget Request	Admin. Council	Approved Budget	Feb. 28	Board

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*T ERIC, steps 7 and 8 will be at one meeting of full Board + F & B Committee, so Board can vote approval at that meeting.

MANAGEMENT AREA: 2.1 ACCOUNTS PAYABLE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Process invoices for payment by computer systems cheque	Purchase Orders (copies) Invoices Receiving Reports Batches to Computer Vendor Numbers	lists from computer Registers ues or Listings standing Purchase Order lists Information for Budget Reports and Financial Statements	A/C Payable Staff A/C Payable Clerks Chief Accountant Purchasing Dept. Budget Schools Admin. Staff Geac Suppliers
	Process Cheques Requisitions re: Petty Cash reports Mileage Claims Expense Claims Other Claims by computer systems cheques	Standard forms Batch to computer	Same as above and integrated in edit lists, etc.	As above
	Manual Cheques by Typewriter	As above	As above	As above



MANAGEMENT AREA: 2.2 ACCOUNTS RECEIVABLE AND REVENUE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	<u>Misc. Revenue</u>			
	Recovery of damages costs Sale of Equipment Sale of Bldgs./sites Interest Earned Cafeteria Revenue	Memos, Forms Batches to computer	Official Receipts: Bank Statements Edit lists from Computer Revenue portion of financial statements Reports to Ministry	<u>Accounting Dept.</u> A/C Rec. Cashier Accountant Chief of Account Schools Admin. Staff Ministry
	<u>Tuition Fee Revenue</u>			
	Continuing Education Driver Education Summer School Winter courses Day School	Fees and forms from various sources	As above Invoices to Students	As above
	<u>Rental Billing and Revenue</u>			
	Schools & Facilities	Rental Permits Caretakers overtime reports Revenue from Rentals	Invoices for rental Official receipts Billing Summaries Journal entries	Area Business Offices Regional Business Officer and staff as above
	<u>Grants</u>			
	Provincial	Regulations, form work sheets Assessment Information Enrolment Information	Grant calculation forms portion of financial statements - Current Estimates for next year	Accountant Ministry, Revenue Assess, Office Admin. Staff
	Requisitions to municipalities New Year	Assess. Information Ministry Regulations Working papers from Ministry Previous year Financial statements	Estimates for year Requests to Municipalities for new year	Accountant Municipalities

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MANAGEMENT AREA: 2.3.1 GENERAL ACCOUNTING - OPERATING FUNDS

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Daily Borrowing	Accounting Records re: Deposits, Cheques issued, etc.	Promissory Notes to Bank	Accountant
	Journal Entries	Bank Debits Corrections Adjustments Batches to Computer Cheque Cancellations Systems Cheque issued	Computer Edit Lists	Budget Dept. A/C Payable Cashier A/C Rec. Accountant
	General Ledger Account Analysis	Computer Print-out of Trial Balances and Transactions	Corrections Journal Entries Back-up re: Financial Statement and year end	Accountant
	Bank Reconciliations	Cheque cashed through bank A/C Payroll Registers A/C Payable Registers	Reconciliation Statements	A/C Rec. Cashier Accountant

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MANAGEMENT AREA: 2.3.2 GENERAL ACCOUNTING - CAPITAL

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
121	Capital Accounting for all Capital Projects financed by Debenture	Board resolutions re: Projects approval Borrowing Debentures Requests for payment for contract drawings, architect fees, etc. P.O.s for equipment, etc. Invoices for payment	O.M.B. Applications O.E.C.A. Applications Debentures Bank Borrowing Cheques Capital statements Trial Balances & General Ledger Transactions from Computer	Planning Dept. Construction & Design Supt. of Plant Supt. of Finance Supt. of Admin. Services Capital Accountant Chief Accountant
122				

MANAGEMENT AREA: 2.4 PAYROLL

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	<p>Preparation of all input to Computer relative to issuing Salary Cheques</p> <p>123</p>	<p>Reports and forms from Personnel Dept. Overtime reports, Absentee reports, Casual employee time reports Various other reports and Standard Forms</p>	<p>Salary Cheques T4 Slips Various Reports</p>	<p>All Employees Payroll Staff Supervisor</p> <p>124</p>

MANAGEMENT AREA: 4.1 ACCOMMODATION SUPPLY: CAPITAL PROGRAM

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Monitor Planned Development	<ol style="list-style-type: none"> 1. Developer's brief 2. Plan for Sub-Div. registration 3. Facilities inventory 	<ol style="list-style-type: none"> 11. Facility Needs 12. Site Analysis 	Planning
	site Selection	<ol style="list-style-type: none"> 1. Facility Needs (A. 11) 2. Site Analysis (A. 12) 3. Inventory of Sites 	<ol style="list-style-type: none"> 11. Site Designation Agreement 12. Site Selection 13. Site Purchase Agreement 14. Ministry Approval <ol style="list-style-type: none"> (a) site (b) purchase 15. OMB Approval (financing) 	Planning
	Establish Capital Program	<ol style="list-style-type: none"> 1. Facility Needs (A. 11) 2. Demographic Stats 3. Current Enrolment 4. Facilities Inventory (A. 3) 5. Facilities standards 6. Enrolment Projections 7. Reliable/replacement needs 8. Ministry guidelines 9. Available architects 	<ol style="list-style-type: none"> 11. Project briefs 12. Capital Program <ol style="list-style-type: none"> (a) Project descriptions (b) Priorities (c) Cost est. (d) Need justification (e) Architects (f) F & E est. (g) Approvals 	Planning
	Project Proposal	<ol style="list-style-type: none"> 1. Project briefs (C. 11) 2. Capital Program (C. 12) 	<ol style="list-style-type: none"> 11. "Co-op Needs" study 12. Facility Proposal 13. Cost Est. 14. Ministry Approval 15. OMB Approval 	Planning/ Buildings

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MANAGEMENT AREA: 4.1 ACCOMMODATION SUPPLY: CAPITAL PROGRAM (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
Construction	<ol style="list-style-type: none"> 1. Construction Cost (G. 13) 2. F & E Specs. & Costs (G. 14) 3. Contract (G. 15) 4. Working Drawings (F. 11) 5. Construction Specs. (F. 12) 6. Ministry Approval <ol style="list-style-type: none"> (a) site (b) purchase (B. 14) 7. OMB Approval (financing) (B. 15) 8. Building Permits 	<ol style="list-style-type: none"> 11. Construction Schedule 12. Inspection Reports 13. Payment Approvals 14. Cost Control Statements 	Buildings	

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DETAILED PROCEDURE
ANALYSIS

AREA: 4.1.1 ACCOMMODATION SUPPLY - CAPITAL COMPONENT: MONITOR HOUSING DEVELOPMENT

- OBJECTIVES: 1. _____ PROGRAM
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project student yield (Greeniaus)	Housing yield factors	Local Planning Board			Planning
2		Draft Plan of subdivision	Ministry of Housing	Projected Yield	as required	Planning
				Comment on Draft Plan (Letter)	"	Planning
2	Facility Needs Analysis	Projected Yield	Planning Yield Projectn			Planning
		Current Enrolment Family of Schools	Schools			Planning
		Enrolment Projection (3 yr)	Planning			Planning
		Available facilities			130	Planning
		List of Proposed/Reg. Subdivisions	Ministry of housing Munici.			Planning

DETAILED PROCEDURE
ANALYSIS

AREA: 4.1.1 ACCOMMODATION SUPPLY - CAPITAL COMPONENT: MONITOR HOUSING DEVELOPMENT

- OBJECTIVES: 1. _____ PROGRAM _____
 2. _____
 3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project student yield (Greeniaus)	Housing yield factors	Local Planning Board	Projected Yield Comment on Draft Plan (Letter)	as required "	Planning
2		Draft Plan of subdivision	Ministry of Housing			Planning
2		Facility Needs Analysis	Projected Yield			Planning Yield Projectn
		Current Enrolment Family of Schools	Schools			Planning
		Enrolment Projection (3 yr)	Planning			136 Planning
		Available facilities				
		List of Proposed/Reg. Subdivisions	Ministry of housing Municip.			Planning

DETAILED PROCEDURE
ANALYSIS

AREA: 4.1.2.1 ACCOMMODATION SUPPLY

COMPONENT: SITE PURCHASE

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION	
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING		
1	Prepare site purchase Res'n (Greeniaus)	Site Purchase Agreement	Greeniaus	Site Purchase Resolution		Planning	
		Appr'd Capital Allocation (site \$)	Ministry of Education				Planning
		Project Proposal	Design & Const.				Planning
2	Approval of Site Purchase (Board)	Site purchase resolution	Planning	Approved Site Purchase resolution		Board	
3	Commission site appraisal	Approved site purchase resolution	Planning	Site Appraisal		Planning Appraiser	
5	Prepare Instructions to Lawyer	Approved site purchase resolution		Legal Documentation		Lawyer	
4	Prepare OMB application (Chief Accountant)	Approved Site Purchase resolution		Request for \$ OMB Application to approve site purchase		Lawyer Finance	
5	OMB Approval to Purchase	Application to OMB	Finance	OMB Approval to purchase site		OMB	

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AREA: 4.1.2.1 ACCOMMODATION SUPPLY

COMPONENT: SITE PURCHASE (Cont'd)

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
7	Arrange Temp. Financing	Request for \$ OMB Approval to Purchase site	Lawyer	Bank Loan		Finance
8	Purchase Site	Legal Documentation Bank Loan	Finance	Deed to Site		Lawyer

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AREA: 4.1.3 ACCOMMODATION SUPPLY COMPONENT: ESTABLISH CAPITAL PROGRAM

- OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Project Enrolment (Planning)	Projected Yields from new development Current Birth Rates School Projections Current 3-year Projection Available Facilities Current Enrolment (Separate) Current Enrolment (Public)	Greeniaus Regional Ass. Off Prin. Planning " Separate Sch. Bd. Princ.	3-Year Enrolment Projection	Twice Monthly	Planning Supt. of Famil Planning Planning
2	Estimate Cap	Facility Needs	Planning			Planning
3	Costs, Establish Priorities	Site Purchase Agreements Grant Regulations (const. \$, F/E \$)	Ministry of Education	Facility Needs Cost Estimate Facility Needs Priority Ranked 5-Year Cap Space Forecast	July-Sept.	Planning
4	Prepare Interim Cap. Program (P & B Committee)	Preliminary Cap. Program Current Enrolments (Public) Enrolment Projections List of Approved Arch.	O & C	Interim Cap. Program		

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AREA: 4.1.3 ACCOMMODATION SUPPLY COMPONENT: ESTABLISH CAPITAL PROGRAM (Cont'd)

- OBJECTIVES: 1.
2.
3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
5	Approval: Interim Cap. Program (Board)	Interim Cap. Program		Approved Interim Cap. Program		
7	Prepare Capital Program (Planning & Bldg. Comm.)	Preliminary Cap. Prog. Interim Cap. Program Current Enrolments (Public) List of Approved Arch.		Proposed Cap. Program		
8	Approval of Cap. Program (Board)	Proposed Cap. Program Board Revisions	Board	Approved Cap. Program		
	Approval of Cap. Program (Ministry)	Approved Cap. Program (Board)		Approved Site Allocation Approved Bldg. Allocation		Ministry of Education
6	Prepare	Approved Interim Cap. Program	Board			
9	Project Briefs (Supt.- Families)	Approved Cap. Program General Specs.: Educational	Board	Project Briefs		Planning

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DETAILED PROCEDURE
ANALYSIS

AREA: 4.1.4 ACCOMMODATION SUPPLY COMPONENT: PROJECT PROPOSAL

- OBJECTIVES: 1. _____
2. _____
3. _____

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

AREA: 4.1.4 ACCOMMODATION SUPPLY COMPONENT: PROJECT PROPOSAL (Cont'd)

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
8	Establish Site Development Requirements (D & C)	Site Survey Building Proposal		Site Development Requirements (To Architect)		Surveyor
9	Instruct Architect	General Instructions to Architect Site Development Requirements Site Survey Site Detail Project Brief Name of Architect Unit Cost Guidelines Required Date of Occupancy Project Supervisor	D & C Planning Planning D & C	Confirmation of Commission Instructions to Architect Project Brief		

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AREA: 4.1.5 ACCOMMODATION SUPPLY

COMPONENT: DESIGN I - SKETCH PLANS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Approve Arch./Eng. Consultants (D & C)	List of Proposed Arch./Eng. Consultants	Arch.	Approved list of arch./eng. consultants		D & C
2	Prepare Sketch Plans	Approved Consultants Various buildings standards (const., health, etc.) Consultation-Bd. Staff Consultation-Pks./Rec. Library Board	Various agencies Board Pks/Rec. Lib. Bd.			Architect Bd.-Arch. Architect
3	Sketch Plan	Sketch Plans				
4	Approval (1) P & B Comm (2) Board			Approved Sketch Plans		Board
5	Update Needs Study (Planning)	Approved Sketch Plans Current Enrolments Coop Needs Report		Enrolment Projection for new school		Planning 146
6	Prepare Ministry Submission	Approved Sketch Plans Enrolment Projection Capital Grants Plan Reference Const. Costs	D & C	Sketch Plan Submission 1-Sketch Plans 2-Projections 3-Cost estimates		D & C

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AREA: 4.1.6 ACCOMMODATION SUPPLY

COMPONENT: DESIGN II - WORKING DRAWINGS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare Working Drawings Constr. Specs. (Architect)	Approved Sketch Plans (Board and/or Ministry)	D & C	Working Drawings/const. specs		Architect
		Fire Marshalls Requirements	Fire	Approvals--other Agencies		
		Recommendation--other agencies	OWR Health Environ.	Approvals--Fire Marshalls		
				Notification Required		
				Fire Revisions		
4	Approval - Working Drawings Constr. Specs. (Board)	Working Drawings/Specs		Approved Drawings/Specs.		
		Approvals--other Agencies				
5	Update Needs Study (Planning)	Notification of approval of working/drawings	Board	Enrolment Projection		
		Coop Needs Study				
		Current Enrolments				
6	Prepare Ministry Submission	Approved Drawings/Specs		Working Drawings Submission (to Ministry)		
		Enrolment Projection				

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AREA: 4.1.7 ACCOMMODATION SUPPLY COMPONENT: FINAL PROJECT APPROVAL

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Call Tenders (D & C)	Approved Drawings/Specs Standard Tender forms/ Procedures	Ministry D & C	Tendered Bids		D & C Contracts
2	Analyse Bids (D & C)	Tendered Bids	Contracts	Recommend Contractor		D & C
3	Board Approval of Contract	Recommendations	D & C	Approved Contract		
4	Final Update Needs (Planning)	Approved Contract Coop Needs Study Current Enrolments		Enrolment Projection		D & C
5	Prepare Ministry Submission (D & C)	Approved Contract Enrolment Projection		Final Project Submission		D & C
6	Ministry Approval (Ministry)	Final Project Submission		Approval of Project		

MANAGEMENT AREA: 5.1 PLANT OPERATIONS AND MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
151	Operations	Budget Supervisor of Maintenance & Operations Area Supervisors of Maintenance & Operations Caretaking Staff	Ensuring cleanliness and efficient operations of Physical Plant and Grounds	152

MANAGEMENT AREA: 5.2 PLANT OPERATIONS AND MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
	Central Cap/Current Projects	Budget Principals and Field Superintendents Maintenance Dept.	Various capital improvements to Buildings & Grounds	154

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AREA: 5.1.3 PLANT OPERATIONS

COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUEST

OBJECTIVES: 1.

2.

3.

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine salary cost of present personnel	Payroll print-out	Payroll	Total committed salary cost	Oct. 31	Supervisor (Maintenance & Operations)
2	Determine future personnel requirements and salary costs	List of new facilities Date of completion	New Design & Const.	List of new personnel required and salary cost	Oct. 31	Supervisor (M & O)
3	Determine supply requirements for future facilities	Monthly budget print-out	Computer Service	Total committed supply cost and inflation factor	Oct. 31	Supervisor (M & O)
4	Determine supply requirements for future facilities	List of new facilities Date of completion	New Design & Const.	Total supply cost for future growth, including inflation	Oct. 31	Supervisor (M & O)
5	Determine equipment to be replaced	Survey report on existing equipment	Area Supervisors	Total cost of replacement equipment	Oct. 31	Supervisor (M & O)
6	Determine new equipment needed	Survey report on existing equipment	Area Supervisors	Total cost of new equipment needed	Oct. 31	Supervisor (M & O)
7	Determine cost of sundry smaller budgets	Monthly budget print-out	Computer Service	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)
8	Determine committed cost of contractual services	Department Records	Sec.	Total committee cost plus inflation	Oct. 31	Supervisor (M & O)

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DETAILED PROCEDURE
ANALYSIS

AREA: 5.1.3 PLANT OPERATIONS (cont'd) COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUESTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
9	Determine contractual services required for growth	List of new facilities Date of completion	New Design & Const.	Total cost of future contractual services	Oct. 31	Supervisor (M & O)
10	Prepare detailed budget forecast	All input previously listed	Dept. Records	Total budget forecast	Oct. 31	Supervisor (M & O)

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MANAGEMENT AREA: 5.2 PLANT OPERATIONS AND MAINTENANCE - MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
2	Maintenance of all Physical Plan and grounds	Supervisor of Maintenance & Operations Teaching Staff Caretaking Staff Asst. Supervisor Maintenance (Planned Maintenance) Maintenance Budget	Preservation of Capital Assets	

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MANAGEMENT AREA: 5.2 MAINTENANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
5.2.1	Project Request	1. Breakdown Notification 2. Cap-Current (Family) Request 3. Maintenance Programs (a) Programmed Maintenance (b) Cap-Current (Cent) 4. Capital Programs Sub-Contracts	Project File	Supervisor of Maintenance Engineering
5.2.2	Project Investigation	Project File (P.F.)	1. Project Authorization OR 2. Request for Authorization OR 3. Item for next year's Budget Consideration	Supervisor of Maintenance Engineering
5.2.3	Project Authorization (optional)	Request for Authorization	1. Project Authorization OR 2. Item for next year's Budget Consideration	Originator of Project Request
5.2.4	Design, Contract	Project Authorization (from P.F.)	1. Project Specs/drawings 2. Award of Contract(s) (where appropriate)	Maintenance Engineering Dept.
5.2.5	Project Schedule	1. Specs/drawings 2. Contract award(s) (from P.F.)	1. Work Order 2. Work Schedule (P.F.)	Purchasing Dept. Maintenance Engineering
5.2.6	Carry Out Works	1. Specs/drawings 2. Work Order 3. Work Schedule (P.F.)	1. Signed-off Work Order 2. Authorize final payments 3. Closed-out Project File	Maintenance Engineering
5.2.7	Budget Preparation		Maintenance Programs, Budgets	

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DETAILED PROCEDURE
ANALYSIS

AREA: 5.2.7 PLANT MAINTENANCE

COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUESTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Determine salary cost of present personnel	Payroll print-out	Payroll	Total committed salary cost	Oct. 31	Supervisor (Maintenance & Operations)
2	Determine future personnel requirements and salary costs	List of new facilities Date of completion	New Design & Const.	List of new personnel required and salary cost	Oct. 31	Supervisor (M & O)
3	Determine supply requirements for future facilities	Monthly budget print-out	M.S.K.	Total committed supply cost and inflation factor	Oct. 31	Supervisor (M & O)
4	Determine supply requirements for future facilities	List of new facilities Date of completion	New Design & Const.	Total supply cost for future growth, including inflation	Oct. 31	Supervisor (M & O)
5	Determine equipment to be replaced	Survey report on existing equipment	Area Supervisors	Total cost of replacement equipment	Oct. 31	Supervisor (M & O)
6	Determine new equipment needed	Survey report on existing equipment	Area Supervisors	Total cost of new equipment needed	Oct. 31	Supervisor (M & O)
7	Determine cost of sundry smaller budgets	Monthly budget print-out	M.S.K.	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)
8	Determine committed cost of contractual services	Department Records	Sec.	Total committed cost plus inflation	Oct. 31	Supervisor (M & O)

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DETAILED PROCEDURE
ANALYSIS

AREA: 5.2.7 PLANT MAINTENANCE (Cont'd) COMPONENT: PREPARATION OF DEPARTMENT BUDGET REQUESTS

- OBJECTIVES: 1. _____
 2. _____
 3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
9	Determine contractual services required for growth	List of new facilities Date of completion	New Design & Const.	Total cost of future contractual services	Oct. 31	Supervisor (M & O)
10	Prepare detailed budget forecast	All input previously listed	Dept. Records	Total budget forecast	Oct. 31	Supervisor (M & O)

MANAGEMENT AREA: 6.1 TRANSPORTATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Prepare invitation to tender school and disseminate instructions, etc.	1. School boundaries 2. Transportation Policy - regular students - special - winter bus (additional) - Home Ec. & Ind. Arts - kindergarten - summer school	1. Procedures for schools - forms - instruction	Business Officers
2	Prepare list of pupils eligible for transportation	School O.S.R.	List of pupils eligible for transportation	School
3	Plot pupils	List of pupils eligible for transportation	Plotted pupils (map)	Business Officers
4	Design Routes	Plotted pupils Bus loading factors	Designed routes	Business Officers
5	Determine number of buses	Designed routes	Estimate buses by route	Business Officers
6	Analysis of Tenders	Number of Buses Submitted tenders List of Contractors	Transportation tender spec. Recommended tenders	South Business Officer and Admin. Council
7	Tenders	Submitted bus tenders (Board accepts/rejects)	Recommendations	Business Officers
167	Transportation Contracts Awarded (promised)	Recommended Tenders	Contracts Awarded (promised)	Board 168
9	Bus Routes Designated	Awarded Transportation Contracts	Distribution of Bus Routes	Business Officers
10	Adjustments of bus routes (extra buses)	Additional student enrollment	Distribution of Bus Routes	Business Officers

DETAILED PROCEDURE
ANALYSIS

AREA: 6.1.1 TRANSPORTATION

COMPONENT: REGULAR BUSING

OBJECTIVES: 1. Determination of Student Eligibility for Busing

2. _____

3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	STUDENT ELIGIBILITY					
1.1	Map changes in school boundaries (if any)	School Boundary changes	Board Minutes	Updated school and road network map	Anytime in year	
1.2	Establish 2-mile limit for each school (on map)	Updated schools map	As above	Mapped 2-mile limit	"	
1.3	Compile lists (by school) of streets eligible for transportation	Mapped 2-mile limit	"	List of streets eligible for regular transportation, (by school)	Jan-Mar.)
1.4	Update Transportation Policy instructions to schools (if any)	Changes in transportation policy	"	School Transportation policies forms (1), instructions to schools	") Distribute) to) School) Principals
1.5	Prepare request for Home Ec. & Ind. Arts schedule	List of schools with H.E. & Ind. Arts Facilities, changes in policy	Files, Board Minutes	Request for Home Ec. & Ind. Arts Sept. schedule	")))
1.6	Plot students on road map	Completed school lists (or maps) of students eligible for transportation - grouped either (by street preferably) of alphabetically	School Principals	Maps showing distribution of students eligible for transportation	Mid-Apr.)

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DETAILED PROCEDURE
ANALYSIS

AREA: 6.1.2 TRANSPORTATION

COMPONENT: REGULAR BUSING

COMPLETED BY _____

- OBJECTIVES: 1. Route Design
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION ¹	SOURCE ²	DESCRIPTION ³	TIMING ⁴	
1	Design bus routes (1) Secondary (2) Elementary Optimize bus usage determine number of buses required	a) Plots of eligible students b) Current routes c) Route timing information (experience usually) d) Bus loading factors e) Transit timetables, maps	Above))) Files))	Initial Design of Routes - route maps - number of buses required - number of students per bus	End of July	
2	Compile Master Routes, Allocate Bus Privilege Cards Allocate Transit Tickets (Secondary)	a) Output of 2.1 b) Provisional designated routes & operations	Above Tenders file	Master Routes Bus privilege cards Transit tickets & letters	End of August	To school Principals
3	Adjustment of Routes (because of increased quantity transients or immigration) - add new routes if required - inform operators - distribute extra Bus Privilege Cards	Master Routes Excess students on buses	 Driver survey	Adjusted Master Routes Information re new routes	Sept. End of Sept.	Designated Operators 172

DETAILED PROCEDURE
ANALYSIS

AREA: 6.1.3 TRANSPORTATION

COMPONENT: REGULAR BUSING

- OBJECTIVES: 1. Transportation Contract Negotiations
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Prepare invitation to tender for bus contracts	List of bus operators Previous years' conditions of tendering)) Files)	Conditions of tendering Application forms	Early March	Advertise & to current bus operators
2	Analysis of Tenders	Operators' Tenders Current contracts Records of Operators' previous service and performance	Operators Files "	Recommended Tenders (Operators & number of buses)	Early April	
3	Contracts Awarded & Bus Routes Designated	Recommended and approved tenders	Board Decision	Notification of accepted tenders and provisional routes designated	End of April	Tendering to Operators
4	Adjust Accounting on Contracts (after route modifications)				End of Sept.	174
5	Contracts Finalized	Provisional contracts and adjustments	Files	Final Contracts	End of Sept.	To bus operators

AREA: 6.1.4 TRANSPORTATION COMPONENT: REGULAR BUSING

- OBJECTIVES: 1. Transportation budgeting
 2. _____
 3. _____

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

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AREA: 6.2 TRANSPORTATION

COMPONENT: SPECIAL STUDENTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS, LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Request special student information from special services				Mid April	
2	Plot all special students	Special class student forms (5), names, addresses, birthdates, home, school	special services resources personnel	Plotted special students	July	
		Current map	Files			
3	Design new routes, and/or adjust regular routes (rural)	Current Master routes (regular transportation) Route maps	Files	Route maps and schedules		
4	Draw up drivers' schedules and student lists	Operators' contracts Route maps and schedules	Files	Drivers lists of special students, ie. names, addresses, school, of each	July-Aug.	To each driver on special route
5	Write to all special students giving their instructions for transportation	Special student, names, addresses, routes	step above	Individual instructions to special student - route - timing - operator - bus number - telephone numbers	Mid Aug.	

6.2 TRANSPORTATION (Cont'd)

COMPONENT: SPECIAL STUDENTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS/ LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
6	<p>Update special student lists in accordance with responses to individual letters (previous step)</p> <ul style="list-style-type: none"> - Cross untraced/moved students off respective bus lists - make enquiries of special services to trace such students - inform operators of changes 	<p>Correspondence re: changes of address, deceased, etc.</p>	<p>Parents, neighbours, etc. Special Services</p>	<p>Updated Special Student</p> <p>Enquiries to Special Services</p> <p>Notification of change to bus operator</p>	<p>all year</p>	

AREA: 6.3 TRANSPORTATION

COMPONENT: KINDERGARTEN

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Plot morning shift Kindergarten students (with the regular students)	Kindergarten Registrations - names - addresses (or map) - shift			April	
2	Regular Route design (see Regular Busing 2.1)					
3	Design take-home routes for morning shift, and afternoon collection and take home routes (if any)			Morning take-home schedules and afternoon pick-up and take-home schedules		
4	Compile Kindergarten students list (or map) for bus drivers			Names, addresses (or map) of all kindergarten students on his route		To each driver

AREA: 6.4 TRANSPORTATION

COMPONENT: WINTER BUS SCHEDULING

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Establish 1-2 mile limit for each school	Current map with boundaries	Files	Map with 1-2 mile limit plotted	After Sept.	To each school with (K-3)
2	Compile list of streets eligible for winter bus transportation	Output of step 1.		List of streets eligible for winter bus transportation (plus instructions, forms)		
3	Plot eligible students on road map	Lists (or maps) of eligible student names, addresses	School Principal	Plot of eligible students	End of Oct.	
4	Design additional routes or make modifications to regular	Master routes or Bus Maps (3) Current bus contracts awarded	Files	New routes and timing - number of buses required - number of taxis	End of Oct.	
5	Inform contractors and allocate bus privilege cards to schools	New routes, etc.	Step 4 above	Winter bus routes, time and instructions		

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DETAILED PROCEDURE
ANALYSIS

AREA: 6.5 TRANSPORTATION

COMPONENT: HOME ECONOMICS & INDUSTRIAL ARTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Allocate Home Economics & Industrial Arts runs to Operators - i.e., lowest bids	Home Economics & Industrial Arts Program Schedule Operator's Tenders for prices tendered	Principal in Home Facility School	Home Economics & Industrial Arts bus routes and timing	April	
	185					186

AREA: 6.6 TRANSPORTATION

COMPONENT: MINISTRY REPORTS

- OBJECTIVES: 1. _____
2. _____
3. _____

STEP NO.	DESCRIPTION	INPUT INFORMATION		OUTPUT INFORMATION		PARTICIPANTS LOCATION
		DESCRIPTION	SOURCE	DESCRIPTION	TIMING	
1	Check and correct ME 301's	ME 301's - Principals Report on Transportation of Pupils	School Principal	Corrected ME 301's	By Oct. 31	To Ministry of Education
2	Summarize ME 301's on ME 302	Corrected ME 301's	Step 2 Above	ME 302 - Board Transportation Summary		

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MANAGEMENT AREA: 7.1 PERSONNEL DEPARTMENT: ADMINISTRATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS, LOCATION
7.1.1	RECRUITMENT (Non-teaching staff)	<ol style="list-style-type: none"> 1. Department Staff Requisition 2. Candidates 3. Selection 	<ol style="list-style-type: none"> 1. Advertise/Internal Posting 2. Interviews 3. Staff 	Superintendents
7.1.2	SALARY ADMINISTRATION - Job Evaluation - Salary Surveys - Interpretation of Salary Schedules	Interview Evaluation Survey Contribution. Teacher's Documentatio :	Job Description Salary Classification Survey Output Teacher's Salary	Evaluation Committee
7.1.3	EMPLOYEE BENEFITS	<ol style="list-style-type: none"> 1. New Employee 2. Insurance Claim, Workmen's Compensation Claim 3. Terminating/Retiring Employee 	<ol style="list-style-type: none"> 1. Benefits Documentation- Group Insurance, Pension, OHIP 2. Benefit (if acceptable) 3. Necessary Documentation Pension Cheque 	
7.1.4	NEGOTIATIONS	<ol style="list-style-type: none"> 1. Contract Termination 2. Staff Bargaining 	<ol style="list-style-type: none"> 1. Statistical Data, Advice 2. Contract 	Salary Committee
7.1.5	COLLECTIVE AGREEMENTS	Grievance	Grievance Hearing	
7.1.6	TRAINING AND DEVELOPMENT	Need and Selection of Candidates	Training Seminar/Course	
7.1.7	COMMUNICATIONS AND COUNSELLING	<ol style="list-style-type: none"> 1. Employee Question 2. Change in Legislation or Board Policy 3. Employee 	<ol style="list-style-type: none"> 1. Answer 2. Information of Change 3. Counselling 	
7.1.8	PERSONNEL RECORDS	New Employee, Terminating Employee	Employee Records + Files	



MANAGEMENT AREA: 7.2 PERSONNEL ADMINISTRATION: ALLOCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Board Policy - Generate Global Figures for staffing for elem., sec., voc., schools	<ul style="list-style-type: none"> - Student enrolment projections: elementary and secondary by school - formula (board policy) 	Global figures of staff needs	Staff Allocation Committee
2	Calculate the distribution of staff for elementary and secondary schools	<ul style="list-style-type: none"> - global figures of staff needs - secondary school distribution formula - elementary school distribution formula 	<ul style="list-style-type: none"> -Distribution of staff by secondary school -Distribution of staff by family for elementary school 	Staff Allocation Committee (S.A.C.)
3	Estimate of staff mobility (Personnel transfers, resignations, retirements)	Requests for transfer <ul style="list-style-type: none"> - personal - administrative - leave of absence - notices for resignation, termination, retirement - estimates of above - promotion 	<ul style="list-style-type: none"> -Placements of transfers -Estimated Staff movements 	Field/CBO
4	Principal determines staff needs	<ul style="list-style-type: none"> - estimated staff movements - expected enrollments <ul style="list-style-type: none"> - school - planning department - distribution of staff by secondary school - distribution of staff by family for elementary school 	Staff needs	Principals/Field
5	Hiring	<ul style="list-style-type: none"> - Ad to newspaper - internal postings - applications 	<ul style="list-style-type: none"> - hiring of staff - placement 	Principals/Field/CBO

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MANAGEMENT AREA: 8.1 STAFF DEVELOPMENT RELATIONS - DEVELOPMENT

STEP NO.	DESCRIPTION	INPUT	OUTPUT ²	PARTICIPANTS/ LOCATION
8.1.1	Liaison with Teacher Training Institutions	Practice Teaching Arrangement	Package	Teacher Education Officer
8.1.2	Board sponsored Ministry of Education courses	Request to: Teachers Principals Superintendents Program Dept.	Recognized Ministry course Teacher Certificate in area of Study	Teachers Program Department External Expertise Ministry of Education P.D. Council
8.1.3	Credit & Non-Credit Board Courses Re:			
	(a) New Teachers	Request to: Supt. Curriculum Supt. Facilities	Orientation package and event work shops Re: Available resources Curriculum Support services	Coordinator Consultants Teacher Education Officer
	(b) Department Heads	Identify needs of new for refreshment courses for existing Heads and orientation identify candidates	Program to be written	Teacher Education Officer Existing Heads Former Heads
	(c) Leadership	Recognition of need Development of System of Identification - Identification Form - Assessment Form	Staff Factors Leadership Development Seminar Role Development Programs Leadership Identification Inventory Assessment of Leadership Candidates	Teachers 164 Supt. Academic Affairs Board

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MANAGEMENT AREA: 8.1 STAFF DEVELOPMENT & RELATIONS - DEVELOPMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT ¹	OUTPUT ²	PARTICIPANTS/ LOCATION
8.1.3	d) Substitute Teachers	Advertisement of Positions Signing of Contract Issuance of Temporary I.D. Card	In-service Programs Permanent I.D. Card	Teacher Education Officer Supt. of Schools (Program)
	(e) Parent Volunteers	Parent In-service Principal In-service Teacher In-service	Guidelines	Volunteers in schools Committee
8.1.4	In-service and Workshops	Request of school(s) new program Professional Activities	Workshops Related Materials Ongoing Assistance	Supt. (Program) Coordinators Resource Teachers
8.1.5	Development of Local Program (Supplemental of Study Committees)	Request of: Teacher(s) Grade Division School Family	In-service Materials	Program Dept. Teachers outside Expertise
8.1.7	Liaison with Community Industry	Meeting with school, commercial and industrial representatives	Work experience Programs	Individual School Technical & Comm. Directors Businessmen P.D. Council
8.1.8	Liaison with Teachers' Federations	Requests from Members of P.A. Council	Coordination of Professional Activity Days on Regional Basis	P.D. Council O.S.S.T.F Education Assn.
8.1.9	Professional Activity Days	Board Teachers Federation Program Department	Professional Activities	Sheridan College Liaison Committee

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MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.1	Board Policies and Regulations	Policies and Regulations	Dissemination of information to all staff	Staff of - Board Offices - Schools - Maintenance Areas - Personnel Dept. - Learning Centres
8.2.2	Appointment of Administrative and Supervisory Personnel	Operating Procedures 4, 5, 11	Advertisement Interviewing Hiring Placement	Trustees Supervisory Officers Principals Search Committee Interview Committee
8.2.3	Appointment of Principals, V.P., Coordinators, Consultants and Related Positions	New Position O.P. Staff 4	Hiring Promotion Placement	Candidate Interview Committee Director Board
8.2.4	Courses, Conventions, Seminars for Staff	Policy 10	Schedules Circulated Programs Organized Participants Identified Facilities Arranged	All Staff
8.2.5	Leaves of Absence	Identify Participants	- Leave, Exchange, Loan or Refusal - Need for Replacement	Supt. of Academic Affairs Educational Improvement Committee Supt. Academic Affairs Board
197	(i) Educational Improvement (ii) Exchange or Loan (iii) Maternity	Policy Application Form O.P. 8 O.P. 8 O.P. 8		



MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.6	Twenty-Five Year Club	Study of Service Recognition p. 39	Annual Budget	Trustees Supervisory Officers 25 Year Club Members
8.2.7	Staff (i) Campaigning for Public Office (ii) Election to Public Office	p. 34 p. 34	-Approval or Rejection of Leave -Terms of Reappointment -Procedure to fill vacancy	Teacher Employee Board
8.2.8	Conflict of Interest	Education Act Policy 8	Resolution	Supervisory Officers Board
8.2.9	Retirement Allowance Age	Policy 29 Policy 28	O.P. 19 Retirement Board Approval Replacement Need	Retiree Board
8.2.10	Payment of Employees in event of Death	Policy 25 Death of Employee	Payment to Estate	Admin. Services Personnel Dept. Board
8.2.11	General Absence	p. 22, O.P. 8		
8.2.11.1	Sick Leave (Admin. & Non-teaching)	p. 32	Leave Granted	Employee Doctor
8.2.11.2	Holiday Allowance	p. 19, Arrangements with Supervisor	Holiday	Employee Board
8.2.11.3	Temporary Appointments to positions of Greater Responsibility	p. 36, Reg. 1 & 2	Appointment	Candidate Supervisor Board

MANAGEMENT AREA: 8.2 STAFF DEVELOPMENT & RELATIONS: RELATIONS (cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.2.11.4	Student to Staff Ratio	p. 35	Ratio Established	Committee Board
8.2.11.5	Financial Assistance to Teachers on Exchange Serving in Peel Schools	p. 17	Financial Assistance	Candidate Board
8.2.11.6	Maternity Leave	O.P.8	Leave	Teacher Supervisor Principal

MANAGEMENT AREA: 8.3 STAFF DEVELOPMENT & RELATIONS - EVALUATION (ACADEMIC) (Cont'd)

STEP NO.	DESCRIPTION	INPUT ¹	OUTPUT ²	PARTICIPANTS/ LOCATION
8.3.1.4	(d) Supernumerary Teachers	Operating Procedures Staff - 6 Staff - 21	Report of Principal - to Teacher - to School - to Field Office Administrative Transfer	Principal Supt. (Family)
8.3.1.5	(e) Supply Teachers	Operating Procedures Staff - 2 Seminar Program	Evaluation by Principal Approval as Supply Teacher Frequency of Employment	Principal Supt. of Program Teacher Education Officer
8.3.2	Evaluation of Vice-Principals	Operating Procedures Staff - 21 Staff - 4 Staff - 3	Report of Principal - to Vice-Principal - to School Office - to Field Office Promotion Demotion Transfer Dismissal Professional Development Involvement in Leadership Review Program Triennial Review	Principal Supt. (Family) Prin./Supt./Board Prin./Supt./Board Supt. Prin./Supt./Board Supt. (Family) Supt. (Program) Leadership Review Personnel Supt. (Academic Affairs) Supt. (Family) Supt. of Schools

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MANAGEMENT AREA: 8.3 STAFF DEVELOPMENT & RELATIONS - EVALUATION (ACADEMIC) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8.3.3	Evaluation of Principals	Procedures for Evaluating Principals	Team Evaluation	Supt. (Academic Affairs) Supt. (Family) (two)
8.3.4	Evaluation of Superintendents	Draft Document		Trustees Director Supt.
8.3.5	Evaluation of Lay Assistants	Job Description of Role for each individual position	Informal Evaluation	Principal Supervisors
8.3.6	Evaluation of Resource Personnel	Performance in conducting inservice, workshops, seminars	Informal Evaluation Coordinators, Consultants, RT. Resource Teachers (RT)	Principal Supt. (Program) Supt. (Family)
8.3.7	Evaluation of Volunteers in Schools (unpaid)	Role established by Principal	Informal Supervision	Teacher Principal

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MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) - PROGRAM DEVELOPMENT & EVALUATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
9.1.1	Assessment of related programs	Existing Programs Survey Existing Curriculum guidelines Surveys of - Parents - Teachers - Supts. - C.D.C. - Federation	Resume of elements of existing programs to be considered in proposed program (CDC Draft Paper)	Staff Committee Parents Teachers Supts. C.D.C. Federation (Chairman CDC) Chief Psychologist
	Development of Objectives	Ministry Guidelines Board Policy Curriculum Development Council Draft Paper (1)	Recommended Statement of Objectives	Staff Committee Supts. Supt. (Program) Chief Psychologist
	Approval of Objectives	Recommended State of Objectives (2)	Approved Statement of Objectives	Curriculum Development Council (Admin. Council Board) (where necessary but not usual)
9.1.2	Design of Draft Core Program	Approved Objectives (3) Available Program Material Internal Resources External Resources	Draft Program (Core) Draft Curriculum Guidelines	Curriculum Committee Curriculum Asst. Coordinator 208 External Personnel -Ministry -OISE -Boards Supt. of Sch. Prog

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MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
9.1.3	<p>Selection of Evaluation Methods (5 at same time or after 4)</p> <p>Evaluation of proposed core program material</p> <p>Approval of Program</p> <p>Dissemination of Program</p> <p>Implementation</p>	<p>Draft Curriculum Guidelines</p> <p>Draft Curriculum Guidelines Statement of Objectives Evaluation and Testing Criteria</p> <p>Interim Curriculum Guidelines</p> <p>Budget Supplies In-Service Seminars, Workshops Approved Guidelines</p> <p>Curriculum Guidelines In-service seminars</p>	<p>Evaluation and Testing Criteria (in core program or manual) (Norm Referencing) (Attitude Referencing) (Criterion Referencing)</p> <p>Curriculum Guidelines recommended</p> <p>Approved Guidelines</p> <p>Program (Core) Implementation</p> <p>In-service Strategies</p>	<p>Staff Committee C.D.C. Supt. Curriculum Supt. School Program</p> <p>Experts -Ministry -Other Boards -Peel -Supt. Curr. and Supt. -Staff Cttee. -C.D.C. -Admin. Council</p> <p>C.D.C. Admin. Council Program Committee Board</p> <p>Curriculum Asst. Resource Teachers Teachers Supt. of School (Program)</p> <p>Supt. of Schools (Family) Principal Teachers</p>

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MANAGEMENT AREA: 9.1 SCHOOL CURRICULUM (PROGRAM) (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
Ongoing Evaluation of program	Questionnaires - Parents - Teachers Standardized test results	Evaluati Recommen ts	Teachers Principals Resource Teachers Research Officer	
Periodic revision of Program	Curriculum Guidelines Evaluation Reports	Plans for continuation or revision (1) or in-service	Staff Committee C.D.C. Admin. Council -perhaps receiving report to program committee	

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MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.1	Identification of student need by concerned parent/teacher/ other	Parent/teacher Attendance or psychological Outside source - medical/neighbour/relative	Referral by principal	Field
10.1.2	Assessment of Student	Psychological Services Attendance Services Special Education External Agency	Statement of the students' condition and needs Initiate pupil accounting process, i.e. reports sent to - principal - field--file to psychologist - CBC file	Field
10.1.3	Decision on course of Action	Parent Principal/Teacher Psych/Attend/Special Education	Need for placement in a particular special education program	Field/CBO
10.1.4	Placement	Discussion with parent/ parent concern	Placement in appropriate program at earliest possible time Waiting list established in priority order	Field/CBO
10.1.5	Program Planning (Physical) 213	Program Demand, e.g. number of students by program need; waiting lists Staff/facilities/material budget demands	(a) Development of program, in: - school; e.g., special education teacher, aids, suggestions to teachers - family of schools; e.g. perceptual handicapped - multiunit	Field 214

MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.5	Program Planning (Physical)		(b) Development of Program in: - region; e.g., hard of hearing - out of region; e.g., crippled - other agencies, e.g., Thistletown, Thinks	CBO/Coordinator of Special Ed.
10.1.6	On-going Evaluation of Students in Special Education (repeat steps 2 to 6 as necessary)	Student Progress Students Program	File of Student Evaluation	Field/CBO
10.1.7	Monitoring of student Progress once out of Special Education program	Student Progress Liaison with Boards, Agencies, Prof. Groups	Sustaining Change of Placement	CBO
10.1.8	Staff: - Recruitment (local/field) - Placement (local/field)	Staff Needs	Staff Hiring Placement of Staff	Local/CBO
10.1.9	Professional Development	Special Ed. staff, principal Superintendents, C.B.O. needs Need as seen by school, region, multiunits	Presentation of Program - courses, workshops, visits, etc.	Field/CBO
10.1.10	Budget	Cost for sustaining current operation New Programs	Budget Estimates Budget Implementation	Field/CBO

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MANAGEMENT AREA: 10.1 SPECIAL STUDENT SERVICES: (a) SPECIAL EDUCATION (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.1.11	Curriculum Development	Input from steps 5 and 6 Student Needs Teacher Needs	Program definition - objectives - course outline - evaluation	Field/CBO
10.1.12	Material Development	Consultant Needs Teacher Needs Catalogue material Needs	Material Resource Books Material Displays	Field/CBO
10.1.13	Community Resources - Liaison with external groups, e.g., other boards, agencies, professional groups, etc.	Student Assessments and Needs	Use of Community Resources e.g. - assessment - kids in external program - program support	Field/CBO

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MANAGEMENT AREA: 10.2 SPECIAL SERVICES: (b) ATTENDANCE

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
10.2.1	Casework Counselling	Existing Casefiles (for recurring referrals) Specialist Assessments - psychiatric - medical Principal/Teacher formal & informal inputs Family Environment Community Agencies, other Boards	New or updated casefiles Assessment of student & family situation Recommended course of action Student progress monitoring records	Field/CBO CBO Field Field
	Provincial Court Actions	Daily Reports Response to Pre-court Hearing Certificate of Attendance	Court warning letter Summons papers Court disposition	CBO/Parents/ School Field
10.2.2	Liaison with Home, School and Community Agencies	Special needs, problems of referred students	Referrals by agencies, hospitals, clinics, other boards of education	CBO/Field Office & Community Agencies
10.2.3	Early School Leaving Program	E.S.L. Application & Proposed program School Personnel Assessments	Approval/disapproval of application	Secretary E.S.L. CBO
10.2.4	Reporting and Budgeting	Case Files Statistical & Record Book Report	A.C.s' monthly caseload review Statistical & record book report Annual report to Board	Field Field CBO
10.2.5	Special Research Studies	New legislation, policies, programs, etc.	Estimated Consequences Recommended changes in Attendance Counselling Services & procedures	CBO

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MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT

10.3.1 Psycho-Educational Diagnostic & Programming Services

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Identification of students within each school who require special consideration by the local school staff	Internal school records for previous years Current teacher assessments and/or standardized tests Expression of parental concern Reports from community personnel or agencies - especially medical, counselling Professional Development workshops relating to child development, learning problems, etc. from psych. staff and/or other sources Student	Appropriate class placement by principal Appropriate programming & management by teacher Counselling by staff	Principal, assisted by teachers and counsellors at each school
2	Identification of students within each school who require services of resources beyond the local school	As above Criteria for each of the services for referral	Referral to appropriate consultative service: -Attendance, Special Education, Psychology and/or Referral to appropriate community service: -Public health, Youth Bureau, etc.	Principal, assisted by teachers and counsellors at each school
3	Referral of appropriate students to Psychology Department	Directions from Psychology Dept. re information to be supplied by principal (standard form)	If decision is for referral to Psychology Dept., parental consent is obtained Written referral forwarded to the office of the Chief Psychologist at CBO, either directly or through the Field Office	Principal at each school

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MANAGEMENT AREA: 10.3.1 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
4	Entry of the student's name into the CBO index of special students or notion of prior contact with any Special Service and information available	CBO index of files in FO for special students	CBO index of special students	Clerical asst. at Central Board Office of the Chief Psychologist
5	Psycho-educational assessment of needs	Written data as supplied by school with referral Reports of: - prior assessments Interview with student Student's performance on any test administered Interview with parents, or other individuals with relevant data Chief Psychologist or other Psych. staff, or professional literature	Consultation with teacher and/or principal regarding conclusions of psycho-educational assessment	Psychology Dept. Staff in Field Office
6	Decision regarding appropriate psycho-educational recommendations to be made for remediation and amelioration 223	Assessment information (see above) Chief Psychologist; other Psych. staff; professional literature; other Board consultants Directory of Community Services Consultation with principal, teacher, etc. to explore probable alternatives	Written report to principal summarizing conclusions of assessment & recommendations made. Copy of report to OSR and student's file identified by CBO index. Consultation with parents and verbal report given of assessment and recommendations	Psychology Dept. Staff in Field Office 224

MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (C) PSYCHOLOGY DEPARTMENT (Cont'd)

STEP NO.	DESCRIPTION	INPUT ¹	OUTPUT ²	PARTICIPANTS/ LOCATION
7	Implementation of recommendations which have been made		As identified in the above recommendations, e.g. (a) placement in special education program (b) remediation in regular class (c) counselling (d) referral to community agency--providing and receiving reports to/from community agencies (e) home management	-Field Office special ed'n placement committee -class teacher, Sp. Ed. resource teacher -School Staff, Att. -Psych. staff -Parents -attendance counsellor
8	Checkback or evaluation of recommendations	Principal, teacher and/or parent	Revision of recommendations where necessary	Psych. staff at Field Office

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MANAGEMENT AREA: 10.3 SPECIAL SERVICES (c) PSYCHOLOGY DEPT.
 10.3.2 Psychology, "One-With-One" Volunteer Program

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Search for initial identification and screening of potential volunteers. Explanation of program and general procedures	Appropriate program outline and procedures	Referral of appropriate individuals to Board's Project Director (Office of Chief Psychologist)	Community Coordinator 3 Public Groups
2	Final selection of volunteers and listing	Referral of appropriate individuals to Board's Program Director (Office of Chief Psychologist)	List of Volunteers - available or assigned	CBO Program Director
3	Identification of students requiring volunteer service	Assessment Data (i.e., 1-7 C) Program Outline Previous Annual Report	Student's recommended for "One-With-One" Volunteer Program	F.O. Psychology Staff
4	Recommendation to Principal of student for volunteer	Student's recommended for "One-With-One" Volunteer Program		F.O. Psychology Staff
5	Consideration of Recommendation	Teacher Viewpoint Program Outline	Approval or non-approval	Principal
6	Request for appropriate volunteer by F.O. Psychology Staff	Principal approval	Request for appropriate volunteer	F.O. Psychology Staff
7	Matching of student with appropriate volunteer and assignment of volunteer to F.O. Psychology Staff member	Catalogue of Volunteers Student Assessment Data from F.O. Psychology Staff	Assignment of student to appropriate volunteer Assignment volunteer to F.O. Psychology member	CBO Program Director

MANAGEMENT AREA: 10.3 SPECIAL SERVICES: (c) PSYCHOLOGY DEPARTMENT

10.3.2 Psychology, "One-With-One" Volunteer Program (Cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8	Explanation to parent of volunteer service and gaining consent for student's participation			F.O. Psychology Staff and School principal
9	"Program Planning" for the student	Teacher and Principal suggestions Materials, ideas from Psychology staff and Library at CBO		F.O. Psychology Staff and Volunteer
10	2.3 sessions (weekly) of volunteer with the student to carry out planning program		Monthly progress sheet (format doc.) Earlier report	Volunteer and Student
11	Consultation with/or Supervision of the Volunteer	Monthly progress sheet (format doc.) Earlier report	Additional information Changes in approach when necessary	Community Coordinators F.O. Psychology Staff
12	Monthly in-service program of skill development for volunteers	Volunteers Coordinators & Program Director Outside Resources Personnel		Program Director and Community Coordinators
13	Year end review of progress of each student with volunteer and decision regarding continuation or phasing out of program	Teacher, principal, volunteer	Memorandum to Program Director re: volunteer should continue in program due to various causes n.b.: memorandum always is written to an individual child	F.O. Psychology Staff
14	Year end evaluation of program and assessment of needs for new year	Psychology Staff Volunteers	Annual Report (Formal)	Program Director and Community Coordinators

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MANAGEMENT AREA: 10,3 PSYCHOLOGY DEPARTMENT
 10,3,3 Psychology Department Administration

ST/P NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Determination of role and job descriptions for staff	From teachers, principals of schools From F.O. Psychology Staff	Job descriptions	CBO/Supt. of Special Services Chief Psychologist F.O. - Supt.
2	Determination of need for staff (i.e., number of staff)	Principals F.O. Psychology Staff Chief Psychologist	Staff needs included in F.O. Budget	F.O. Supt.
3	Approval for hiring of additional staff or determination of staff: student ratio	Staff needs included in F.O. Budget - supt. and CBO and Special Services - Chief Psychologist, consultation Specific data re work load in each F.O. (Back up data)	Board approval	Board
4	Hiring of Staff	Board approval Staff needs Interviews	Staff Hired	
5	Assignment of staff to F.O.			232
6	Deployment of staff within F.O.	Chief Psychologist Consultation F.O. Psychology Staff	Staff deployment	F.O. Supt.
7	Consultation with staff and professional development of skills	F.O. Staff Consultations Committee on Professional Development Evaluations of Staff	Professional Development Program, set of topics for all staff Individual concession and supervision with chief Psychologist	Chief Psychologist

MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT

10.3.3 Psychology Department Administration (cont'd)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
8	Integration of Psychology Staff with other Board Consultatives Services in Special Services and other			F.O. Supt.
9	Supervision and evaluation of Psychology Staff	Principals Chief Psychologist	Evaluations (Formal)	F.O. Supt.

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MANAGEMENT AREA: 10.3 PSYCHOLOGY DEPARTMENT

10.3.4 Psychology - General Resource and Consultative Service

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Dissemination of information regarding range of service available			All Psychology Staff
2	Identification of need for service			
3	Provision of Service			

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MANAGEMENT AREA: 11.1 CONTINUING EDUCATION - ADULT EDUCATION

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
11.1.1	Selection of Administrative staff	G-memo to all Staff Applications from Staff Results of initial screening by field superintendents	Selected Staff	Principal of Continuing School
11.1.2	Brochure: Preparation, space allocations, and scheduling	Last year's brochure Miscellaneous information, e.g. letters Comparison of other jurisdictions for good ideas	Book of course offerings Space allocation	Coordinator of Continuing School
11.1.3	Tentative Staff Selection	G-memo to all teaching staff Applications received Screenings by night directors	Tentative Selection of Staff	Night (Field) Directors
11.1.4	Registration of students and allocation of students to classes	Student applications	What courses are economically viable and academically necessary Final staffing Refunds and information to applicants of unavailable courses	Continuing Ed. Staff Supervised by the Night Directors
11.1.5	Monitoring: of student attendance and academic progress, budget control, course evaluations	Attendance figures Student records	Remedial actions Current student records	Night Directors Head Office
11.1.6	Overall evaluation of adult program and Report to Board	Results of Program i.e. - attendance - written evaluation by students - number of students successfully completed courses This year's results	What kind of programs are successful on geographic and program basis Budget Estimate	

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MANAGEMENT AREA: 11.2.1 CONTINUING EDUCATION - SUMMER SCHOOL (SENIOR)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
1	Choose locations of summer schools, esp. credit and 7 & 8 remedial	Schools - accessibility - size - resources - air conditioning - competing usage - previous summer school usage	Selected schools - 3 in North and 3 in South	Principal of Continuing School
2	Selection of Administrative Staff	G-memos to staff for Directors and subject chairman Applications from staff	Selected staff for north and south 1 Director 2 Assistant Directors English, Math & Science subject chairman	Principal of Continuing School
3	Planning, advertising, Promoting summer school	Evaluations of previous year's operations Suggestions from interested groups (Supts., Trustees, etc.) Estimated student demand for summer school	Circular advertising program, to all students Tentative estimates of resources required, e.g., teachers	Principal of Continuing School plus Administrators
4	Tentative Staff Selection	G-memo to all teaching staff Applications received Results of screening by Supts. Interview records	Ranking of teachers by subject Interim letters of appointment to likely teachers	240
5	Student Registration and class scheduling	Student Applications Prescriptive diagnostics (7 & 8 remedial)	Economically viable and academically necessary courses Final staffing Refunds, etc. Transportation requirements	Mainly Directors

MANAGEMENT AREA: 11.2.1 CONTINUING EDUCATION - SUMMER SCHOOL (SENIOR)

STEP NO.	DESCRIPTION	INPUT	OUTPUT	PARTICIPANTS/ LOCATION
6	Monitoring: Student Attendance and Academic Progress, Budget Control, Course Evaluations	Class attendance registers Student records	Remedial actions Student reports	Directors, Subject Chairman, Teachers
7	Summary and Evaluation of Summer School Program	Attendance records and academic results	Report to the Board Input to next year's summer school planning	Principal of Continuing School
8	Budget Estimates for next year	This year's results	Budget Estimate	Principal of continuing School

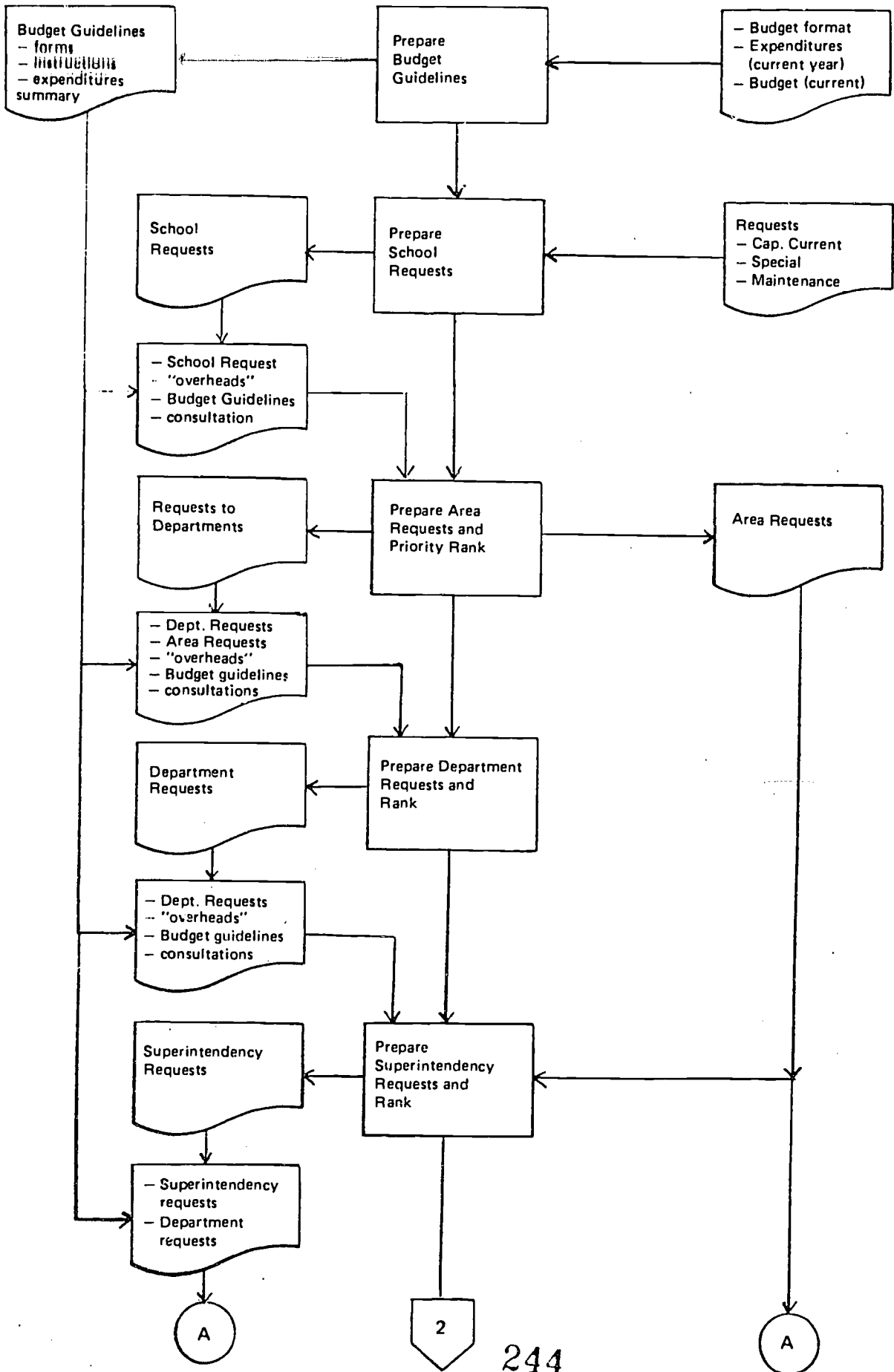
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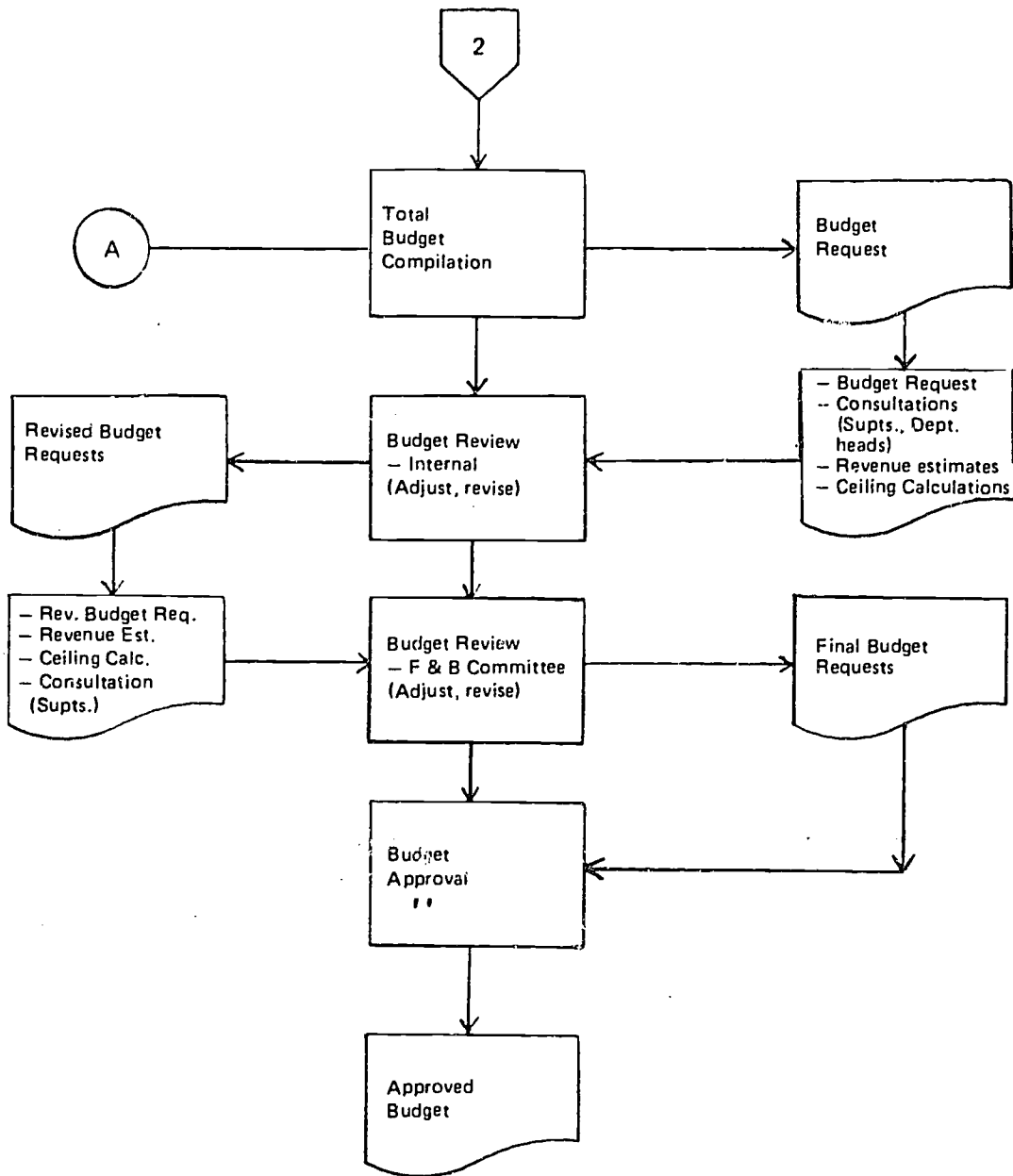
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APPENDIX C:

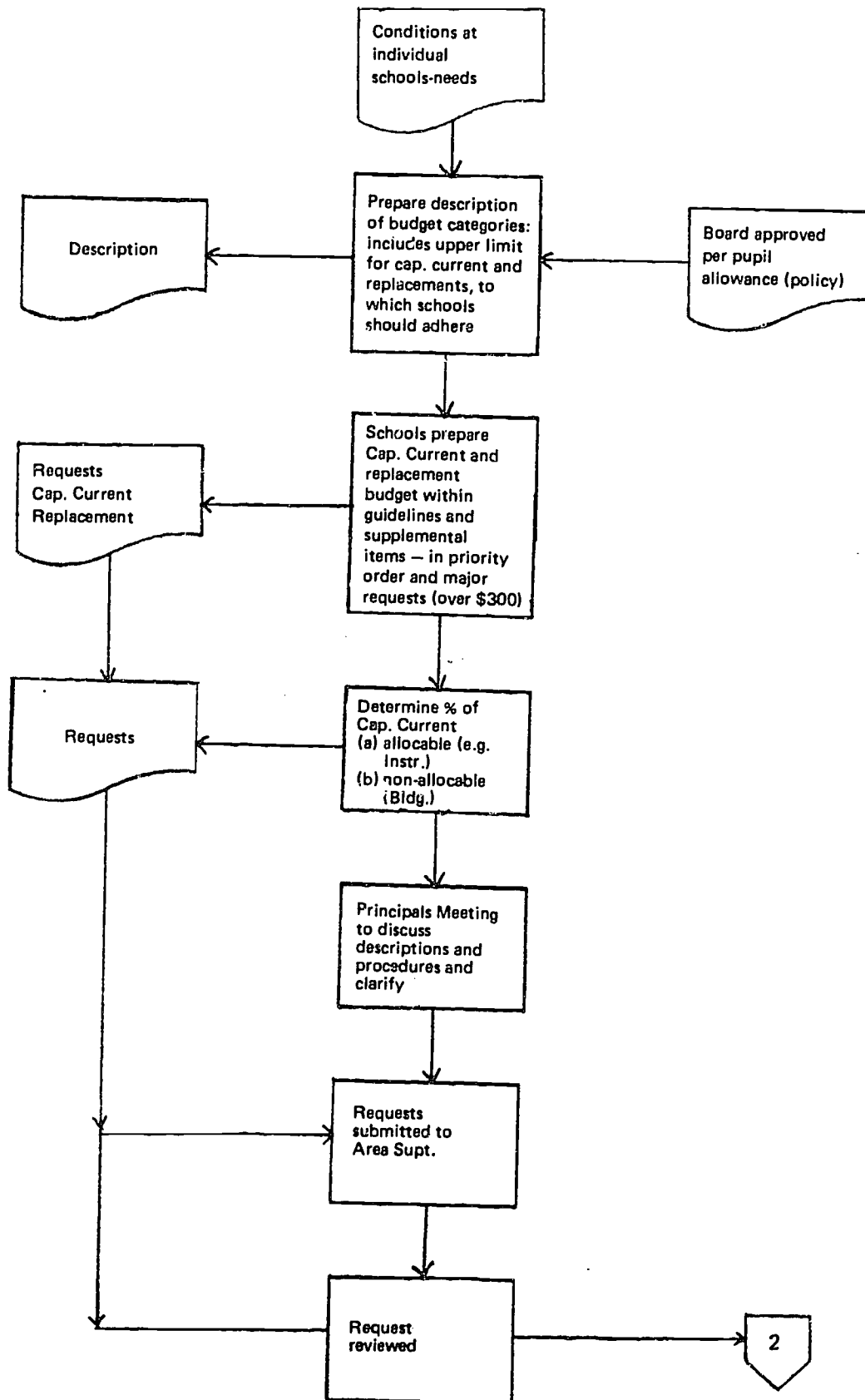
FLOWCHARTS OF MAJOR MANAGEMENT AREAS

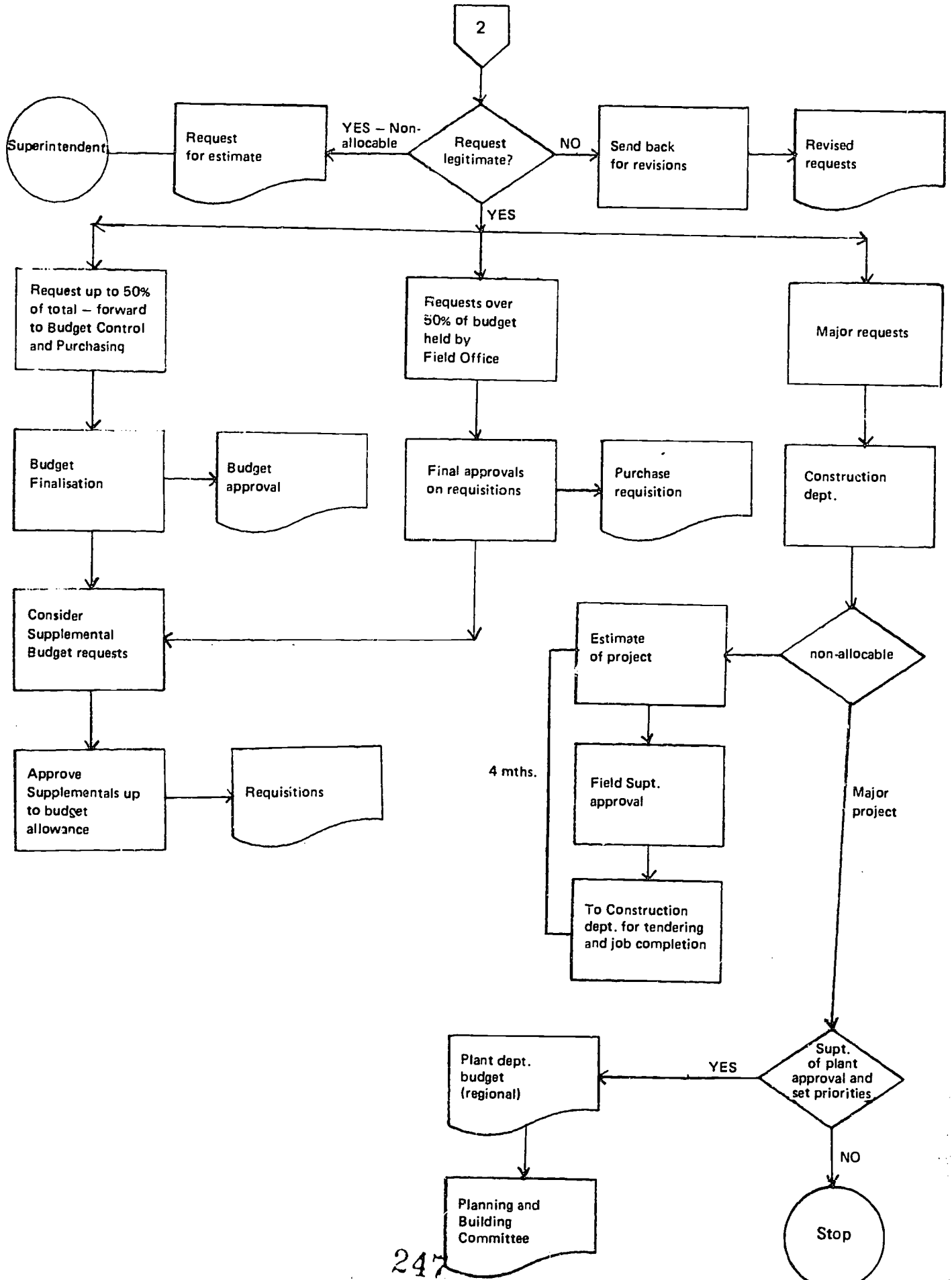
1.1 BUDGET PREPARATION



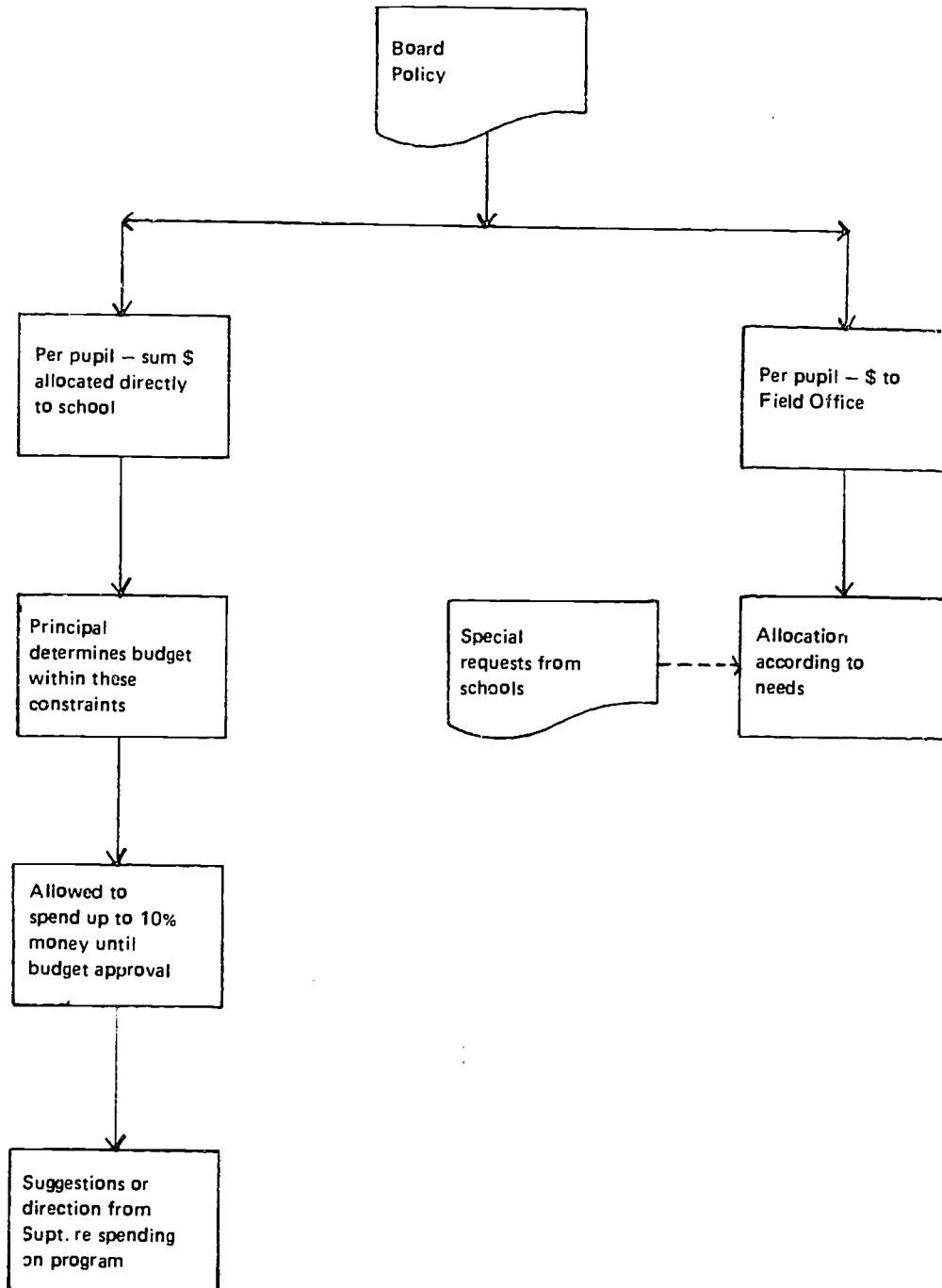


1.1.2.1 BUDGET PREPARATION: School Requests from Field Office

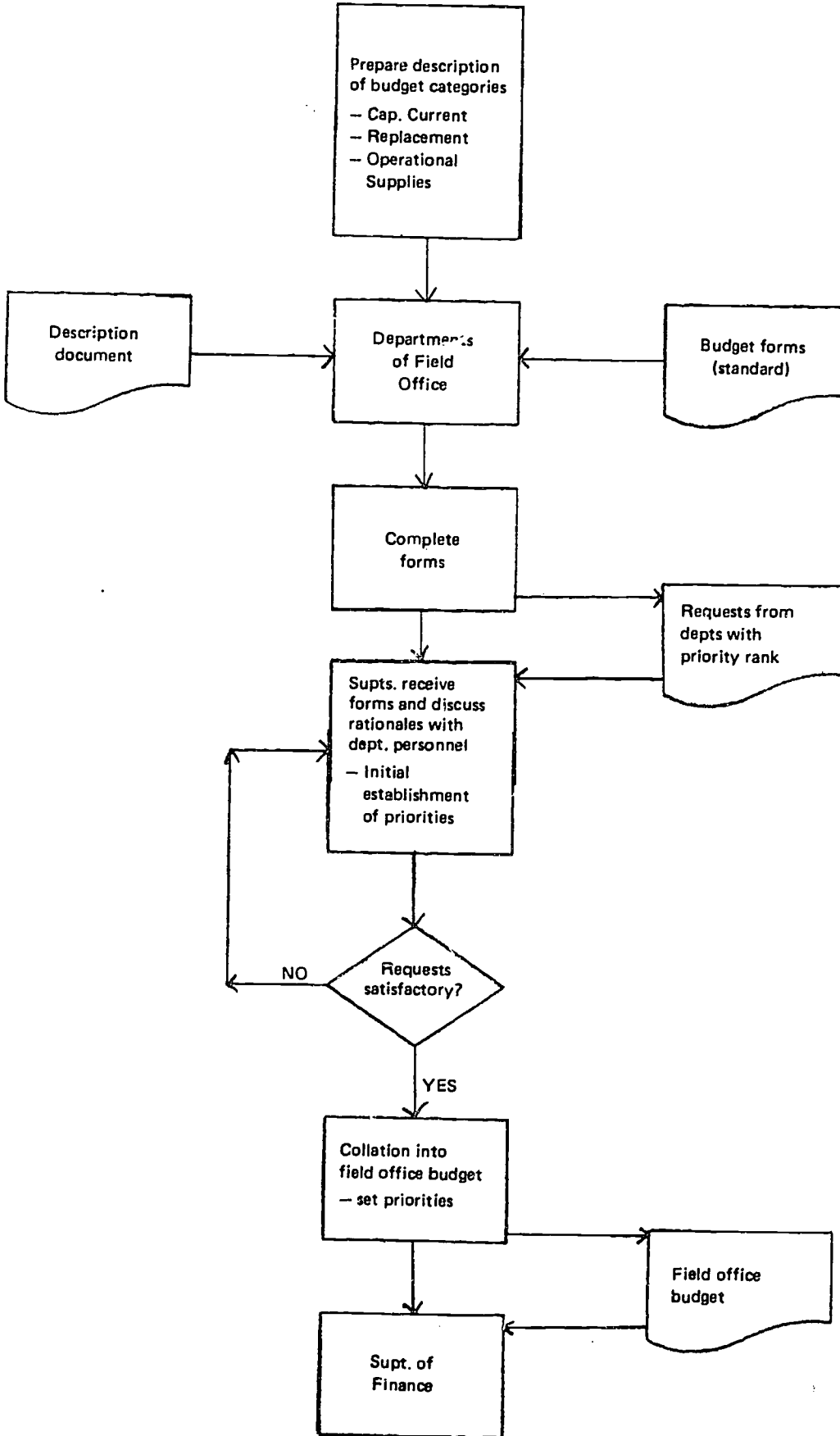




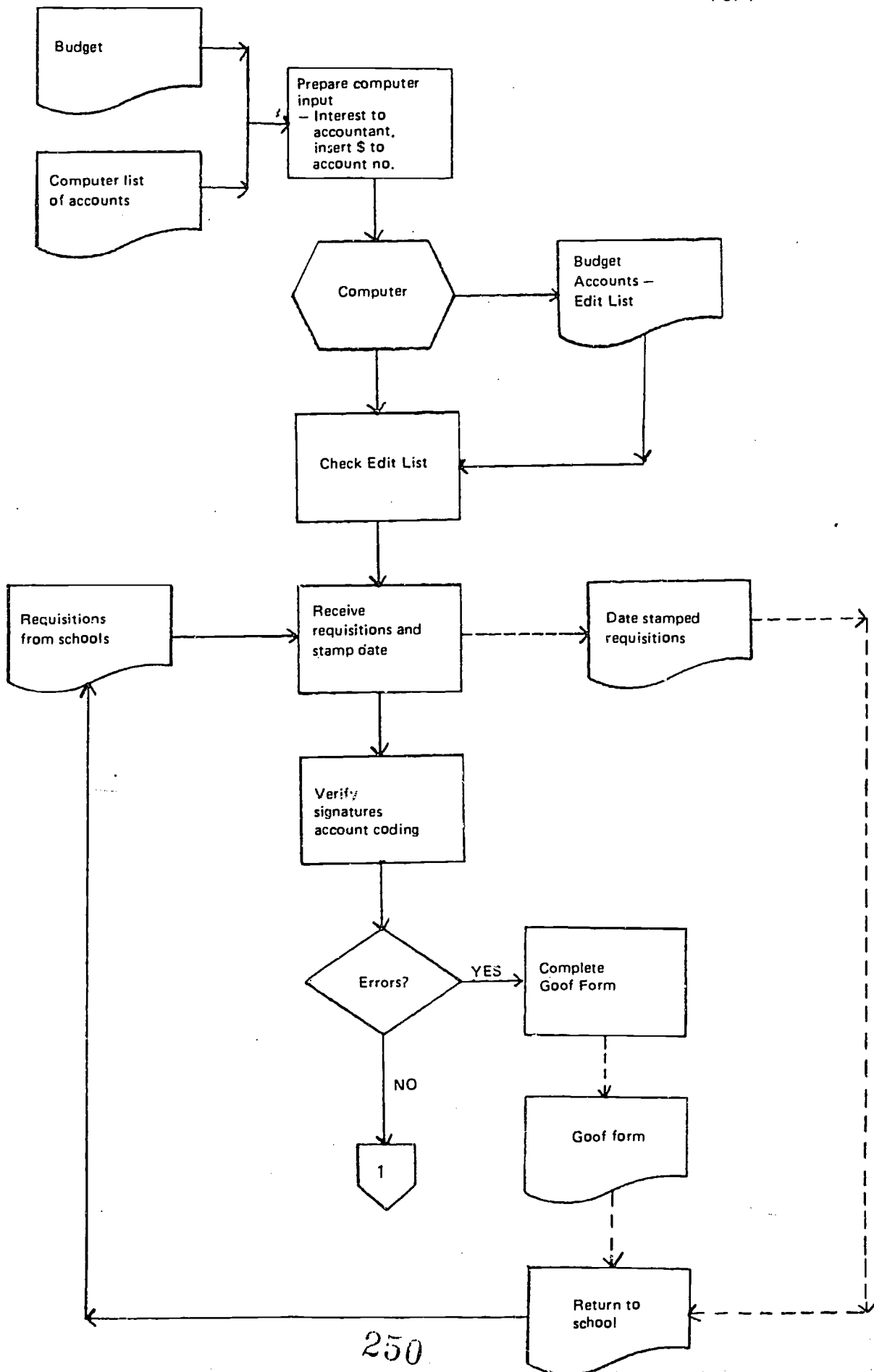
1.1.2.2 BUDGET PREPARATION: School Requests – Operational Budget (Schools)

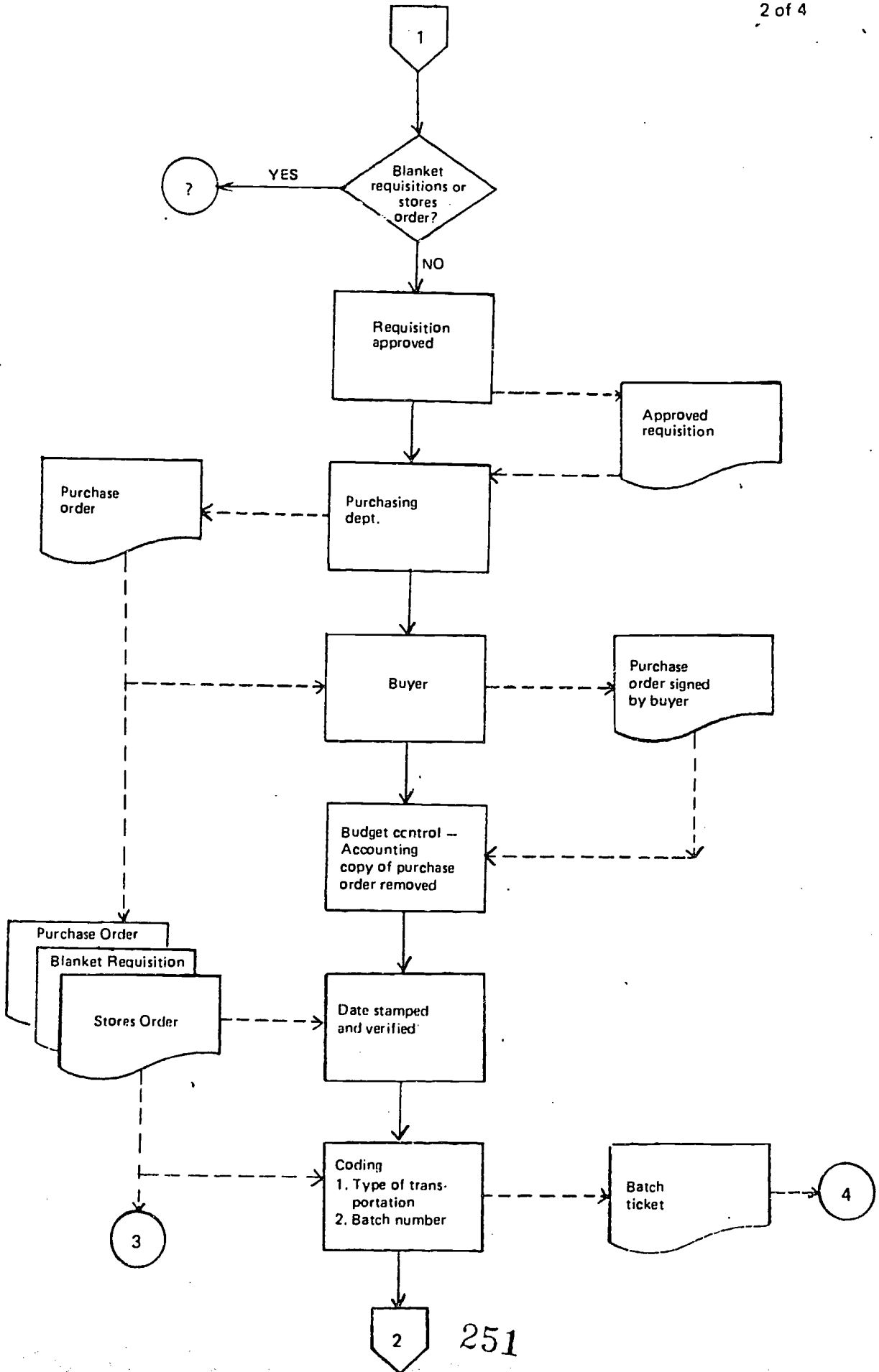


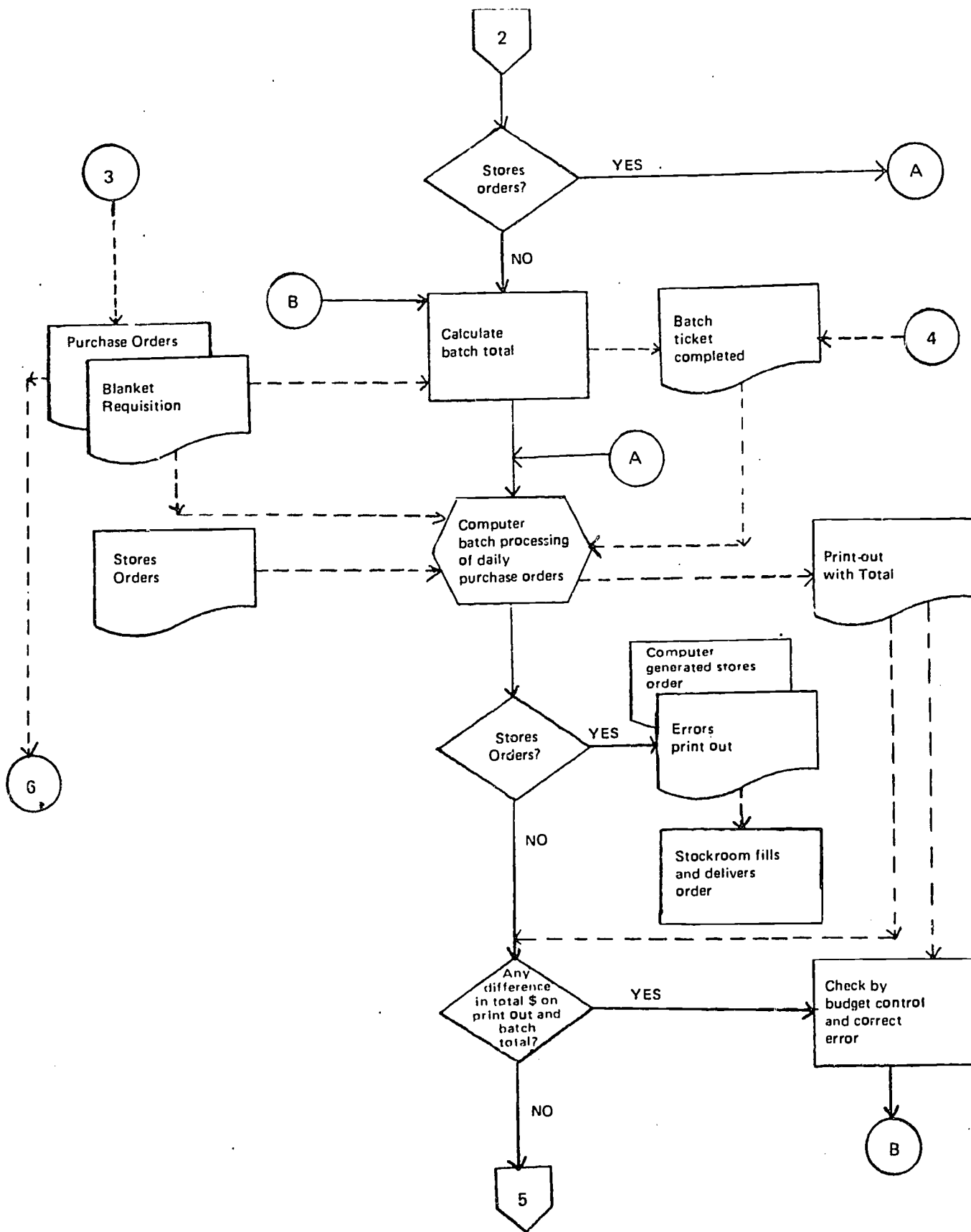
1.1.3 BUDGET PREPARATION: Prepare Area Requests

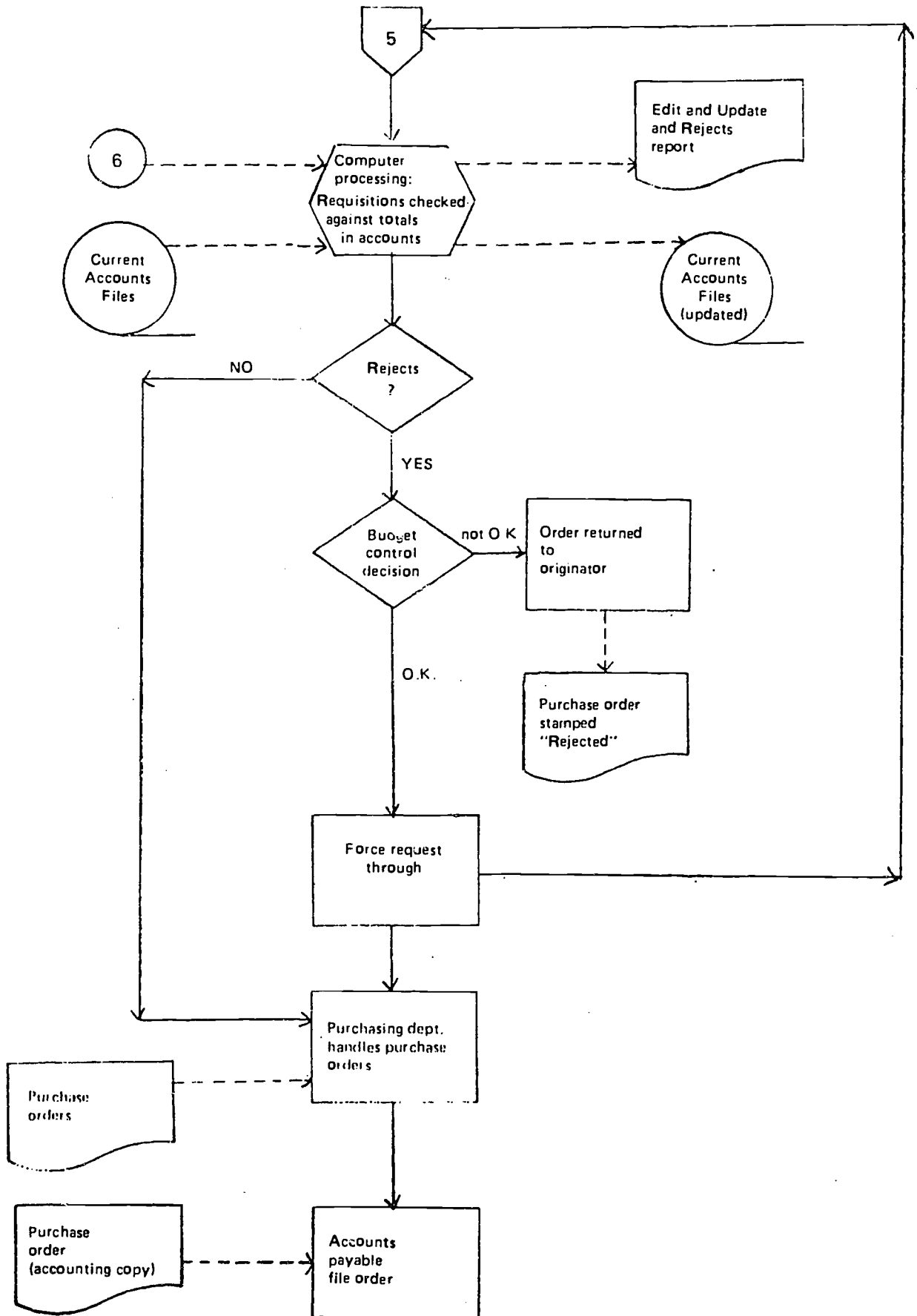


1.2 BUDGET CONTROL

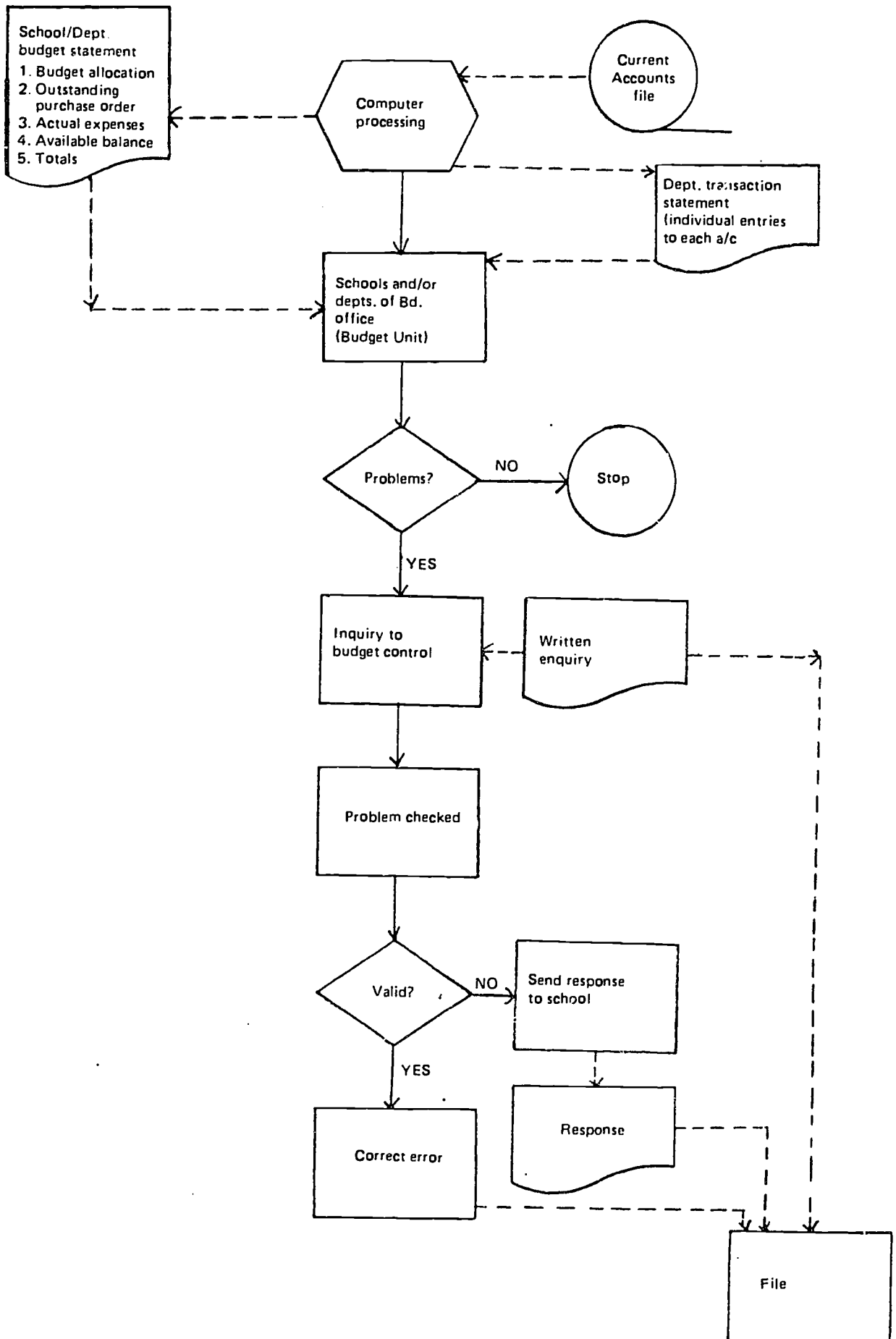




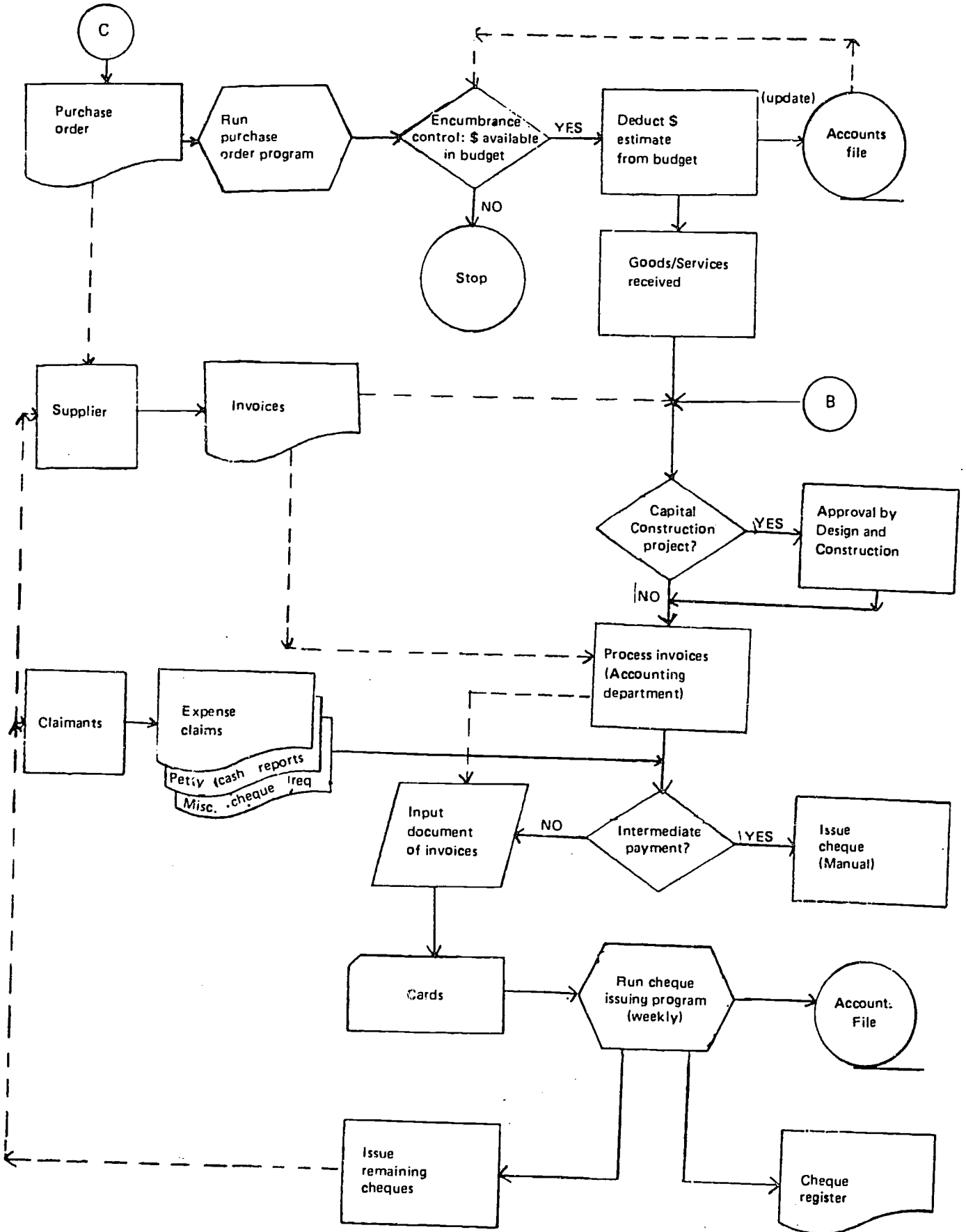




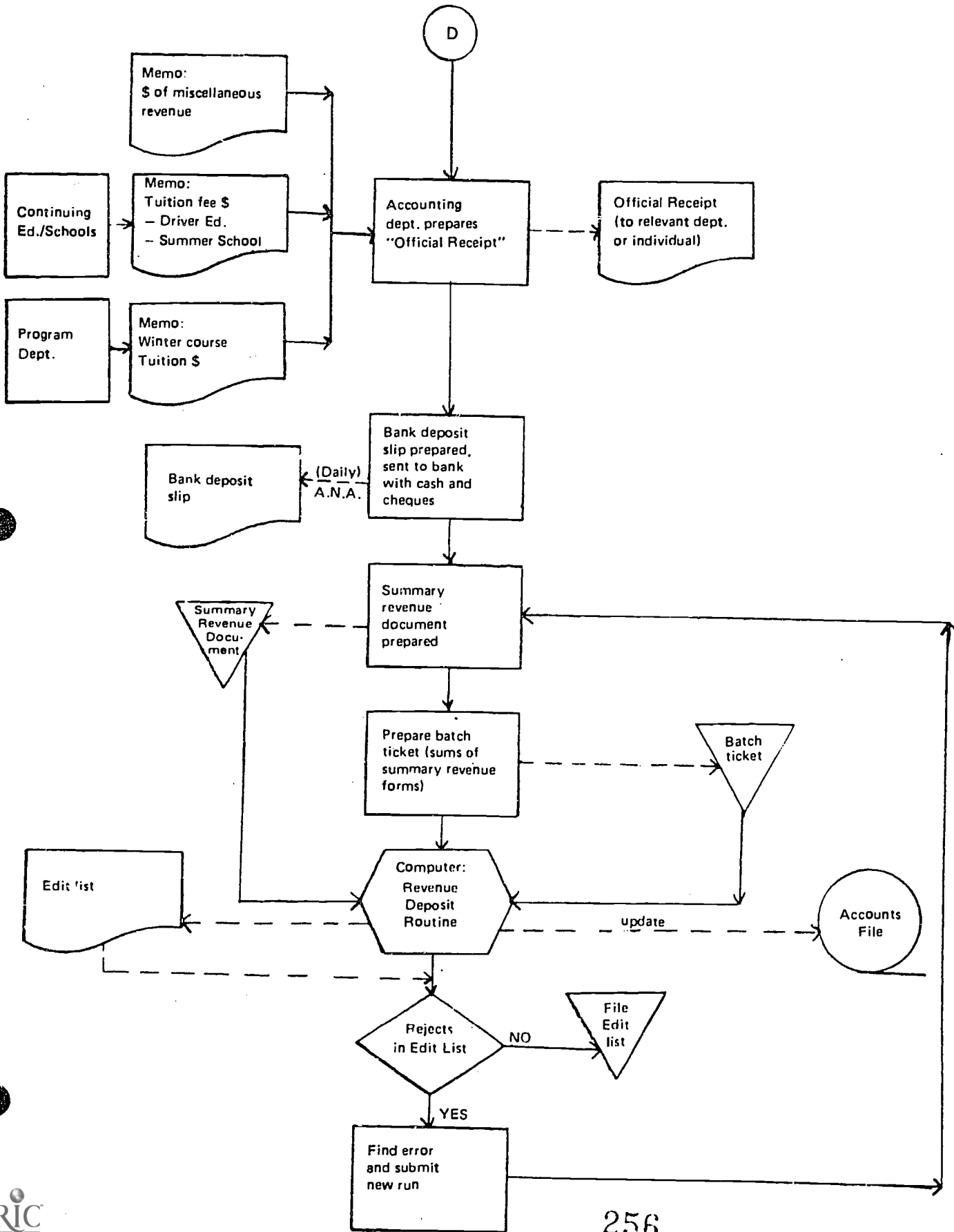
1.2.1 BUDGET CONTROL: Monthly Summary



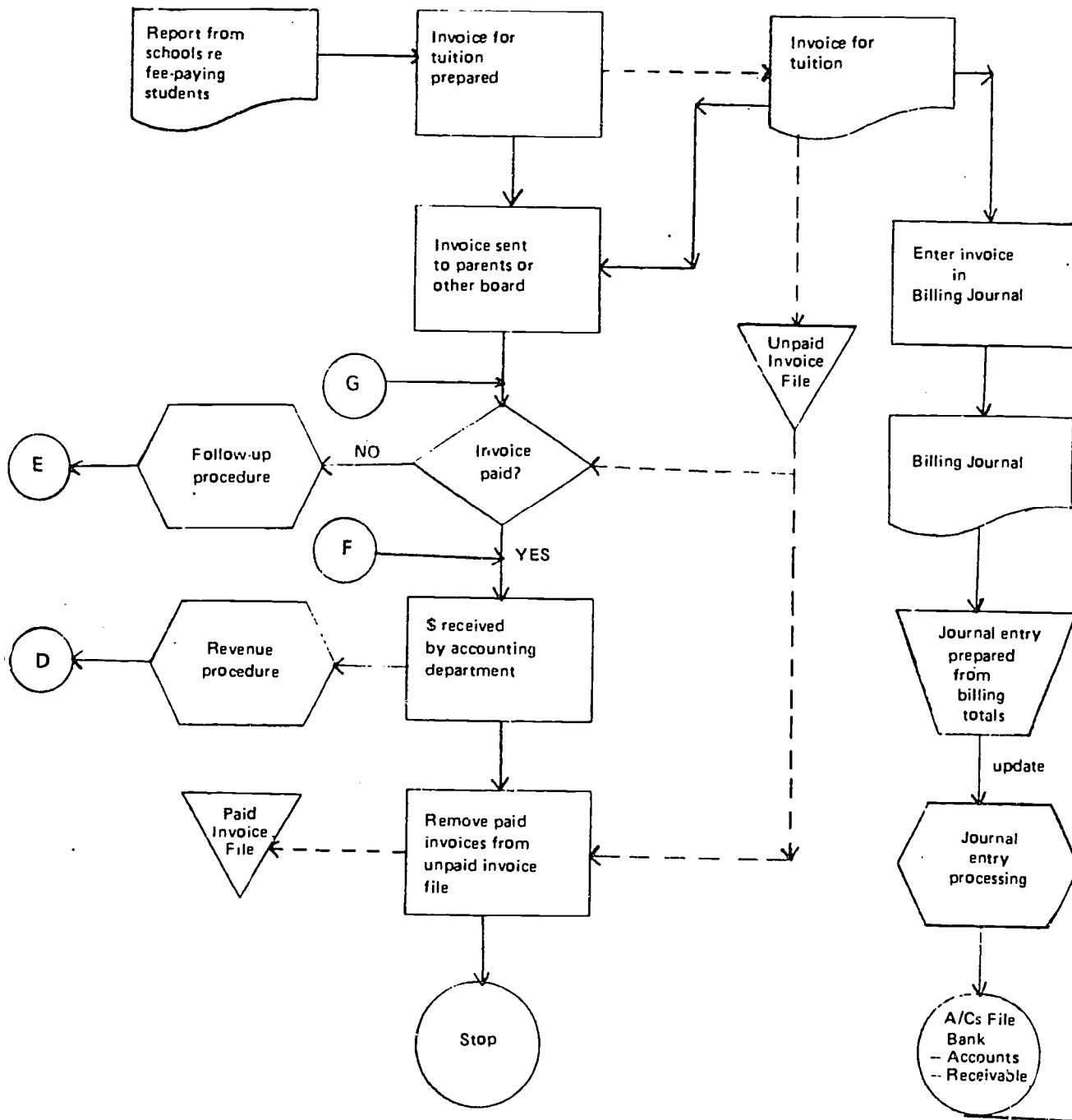
2.1 ACCOUNTING FUNCTION: Accounts Payable



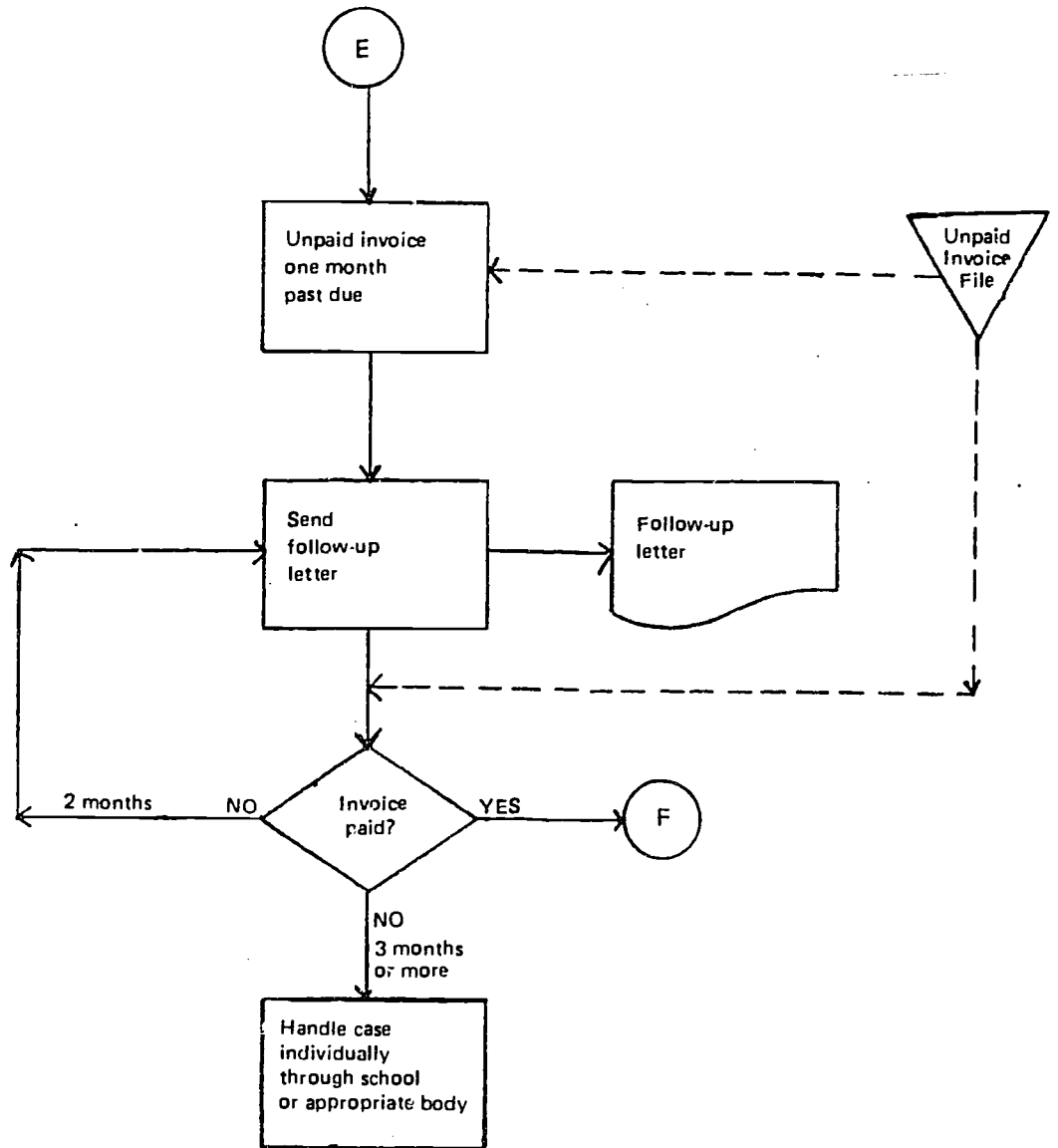
2.2.1 ACCOUNTING FUNCTION: Accounts Receivable and Revenue –
Miscellaneous Revenue and Tuition Fee Revenue



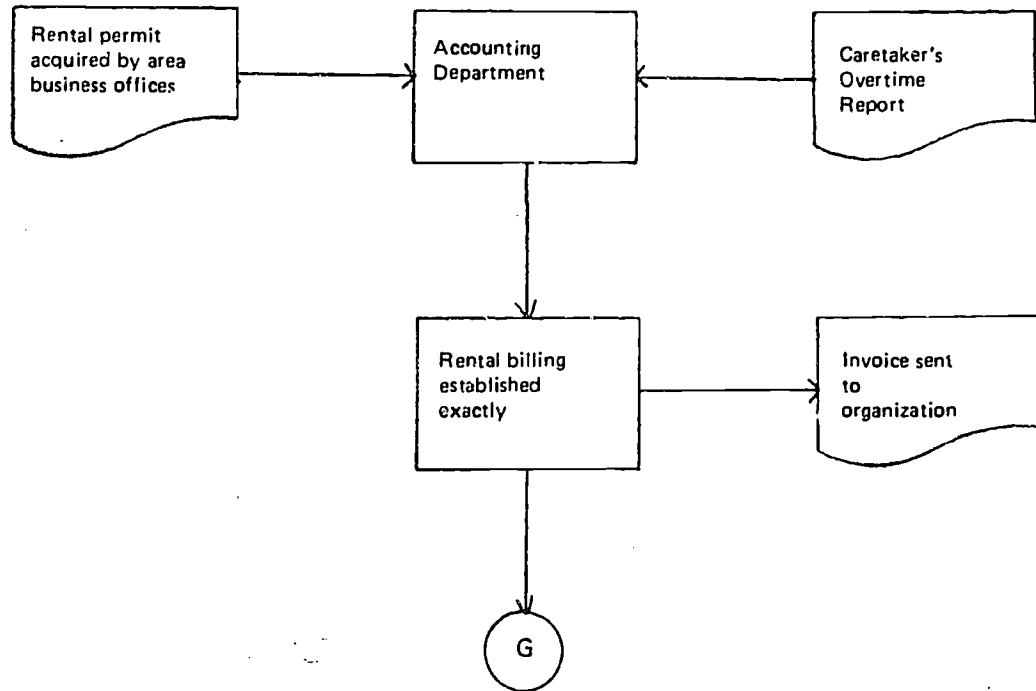
2.2.2. ACCOUNTING FUNCTION: Accounts Receivable – Tuition Fees (Day School)



2.2.2.1 ACCOUNTING FUNCTION: Accounts Receivable – Tuition Fees (Follow-up procedure)

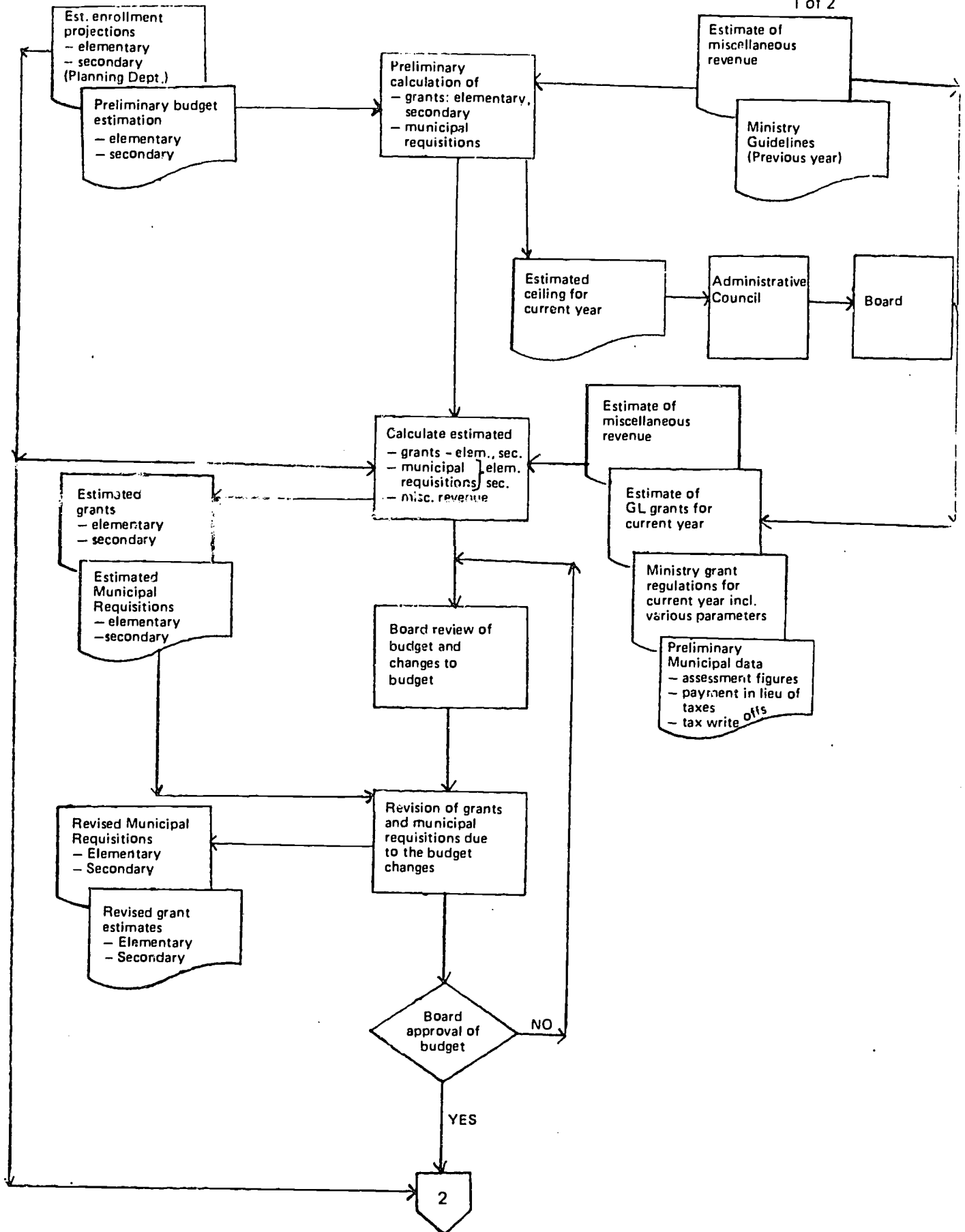


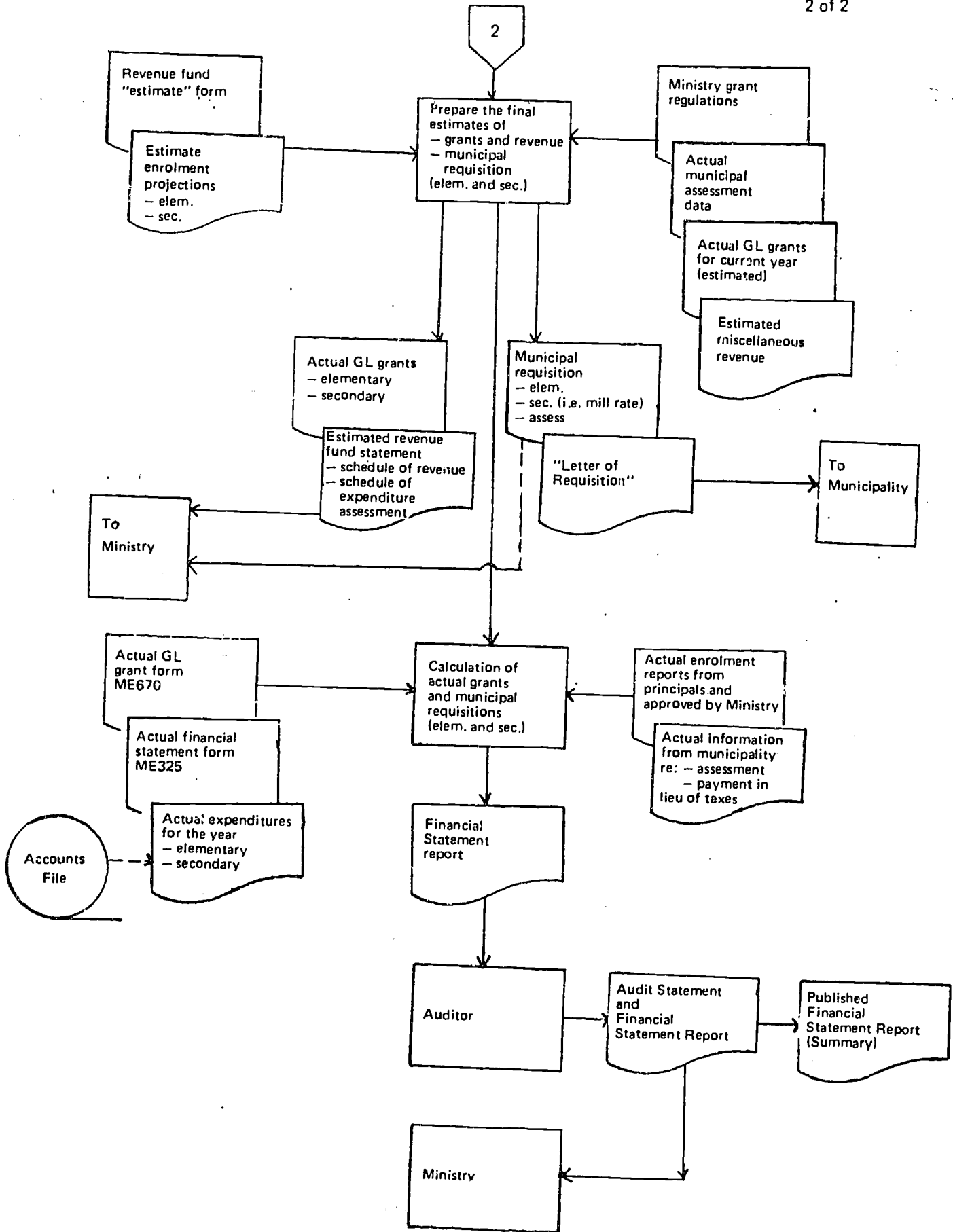
2.2.3 ACCOUNTING FUNCTION: Accounts Receivable – Rental billing and Revenue



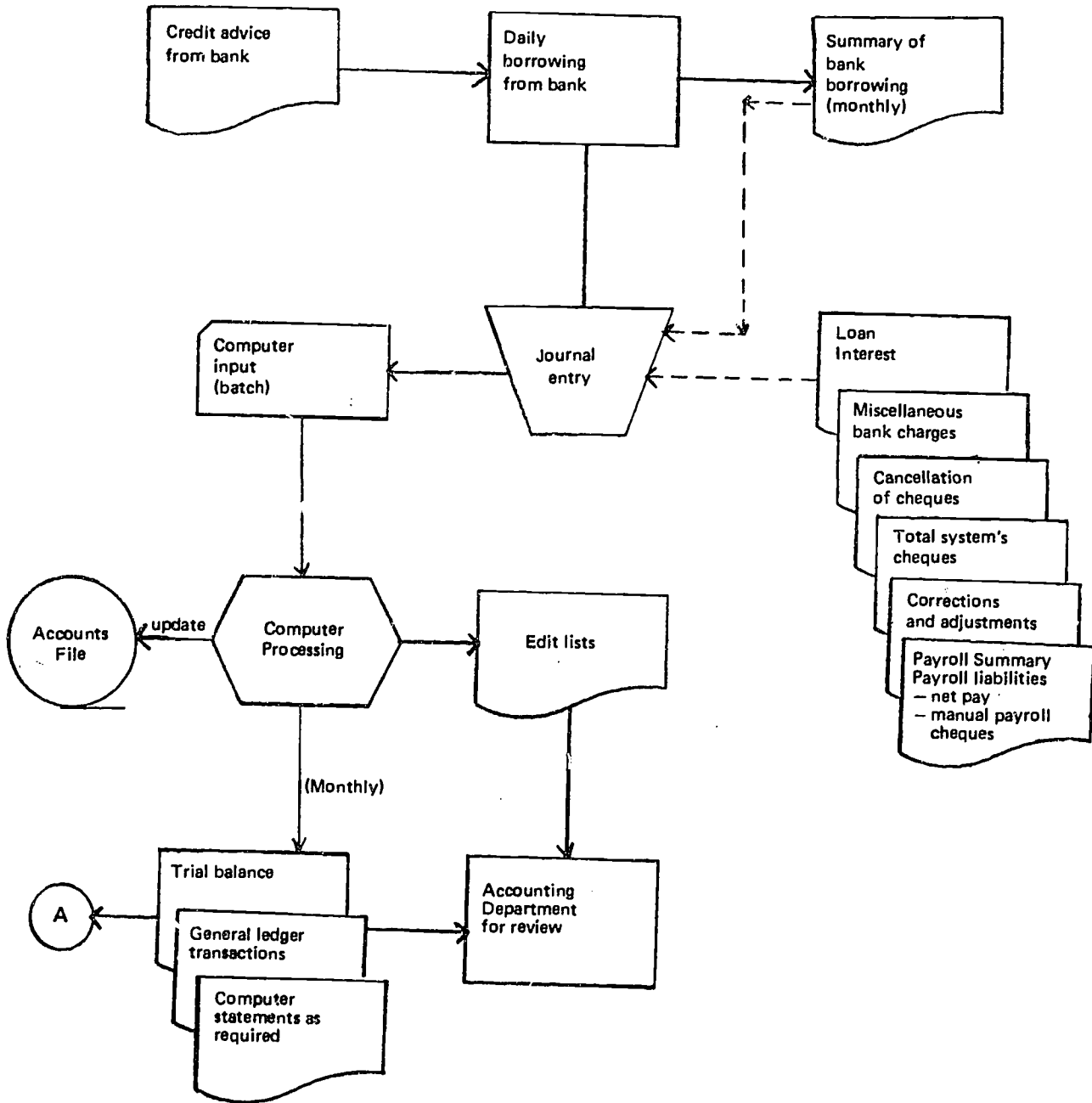
2.2.4 ACCOUNTING FUNCTION: Accounts Receivable - Financial Reporting to Ministry

1 of 2

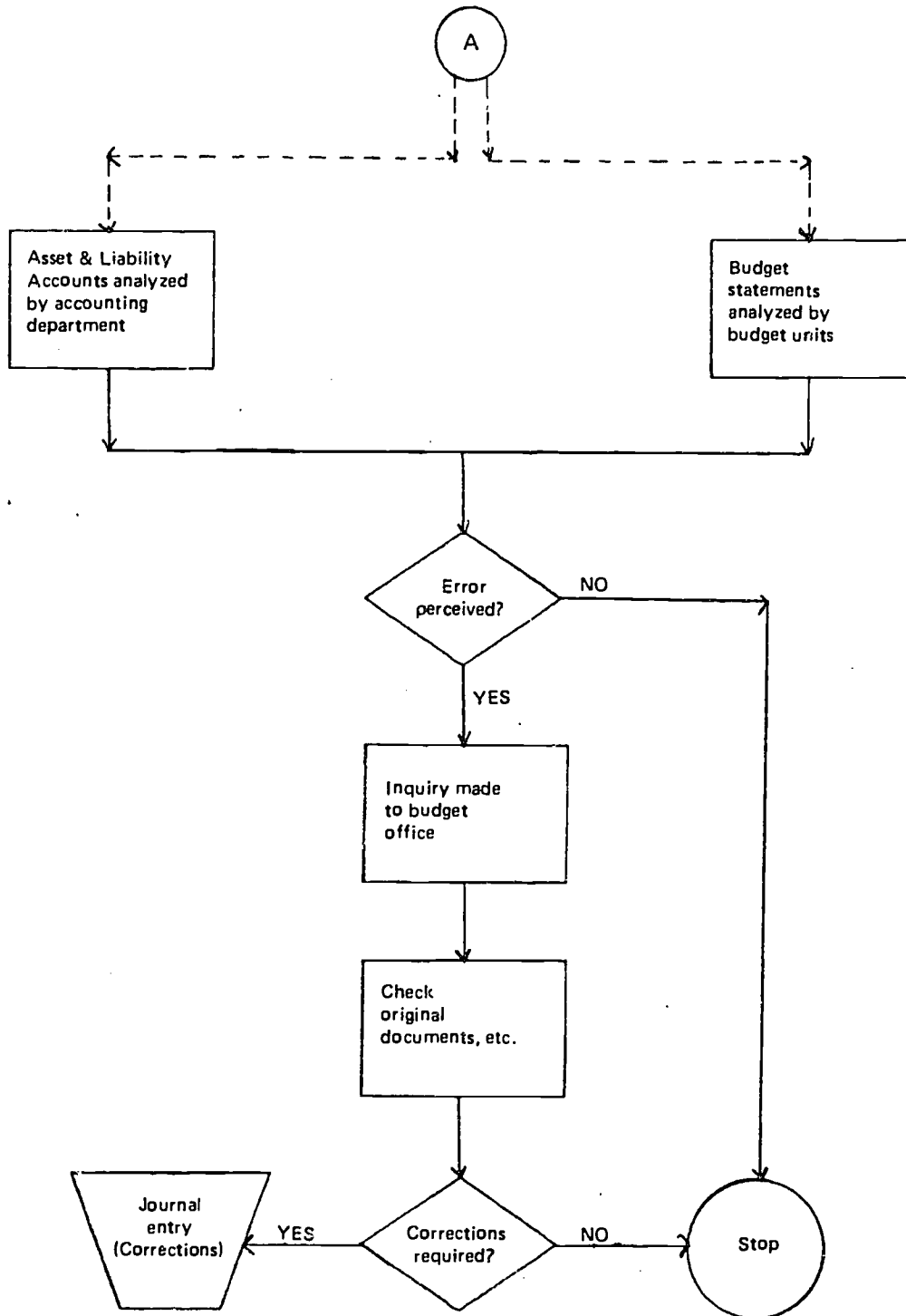




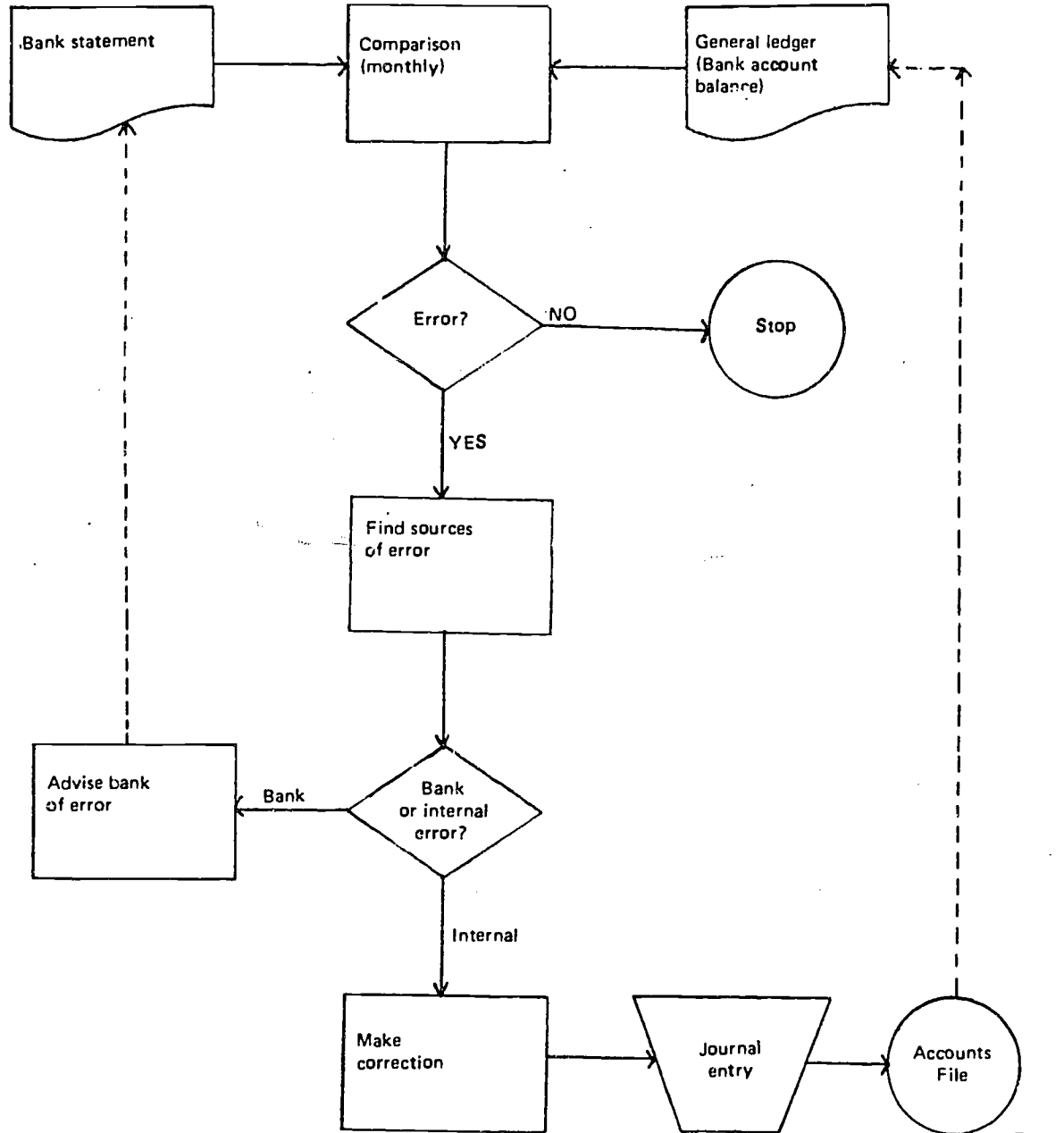
2.3.1.1 & 2.3.1.2 ACCOUNTING FUNCTION: General Accounting – Daily Borrowing & Journal Entry



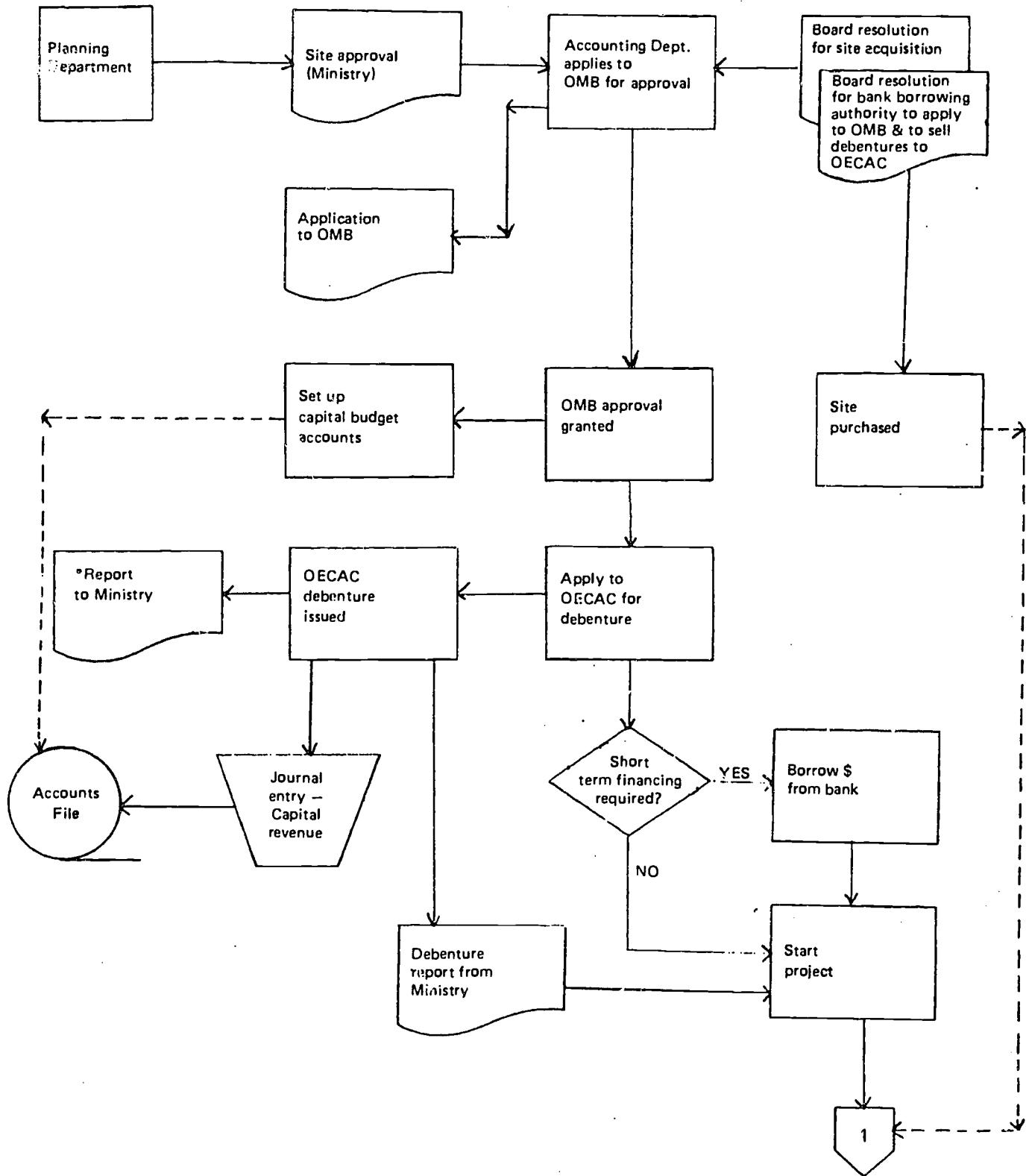
2.3.1.3 ACCOUNTING FUNCTION: General Accounting – General Ledger Account Analysis



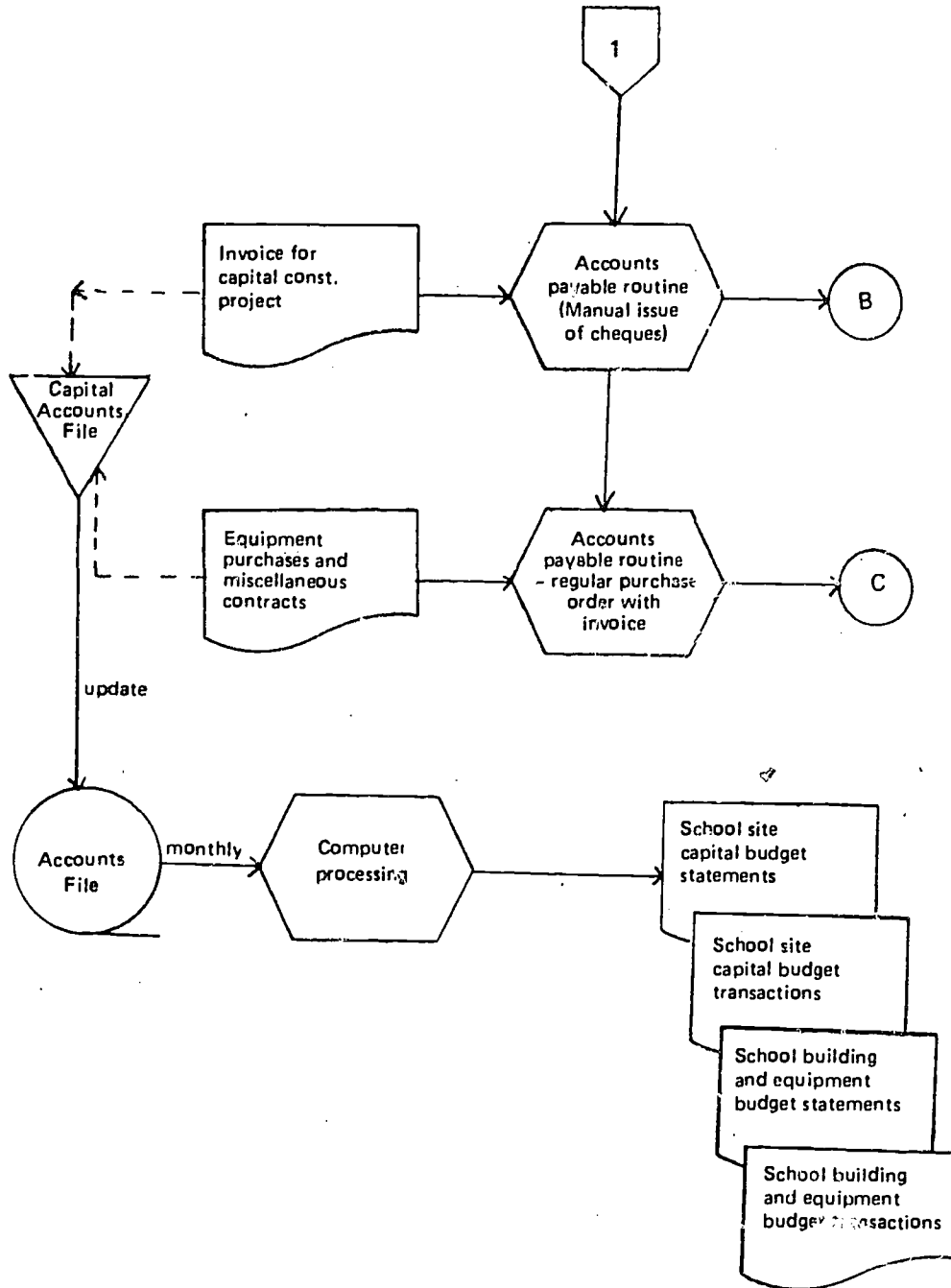
2.3.1.4 ACCOUNTING FUNCTION: General Accounting – Bank Account Reconciliation



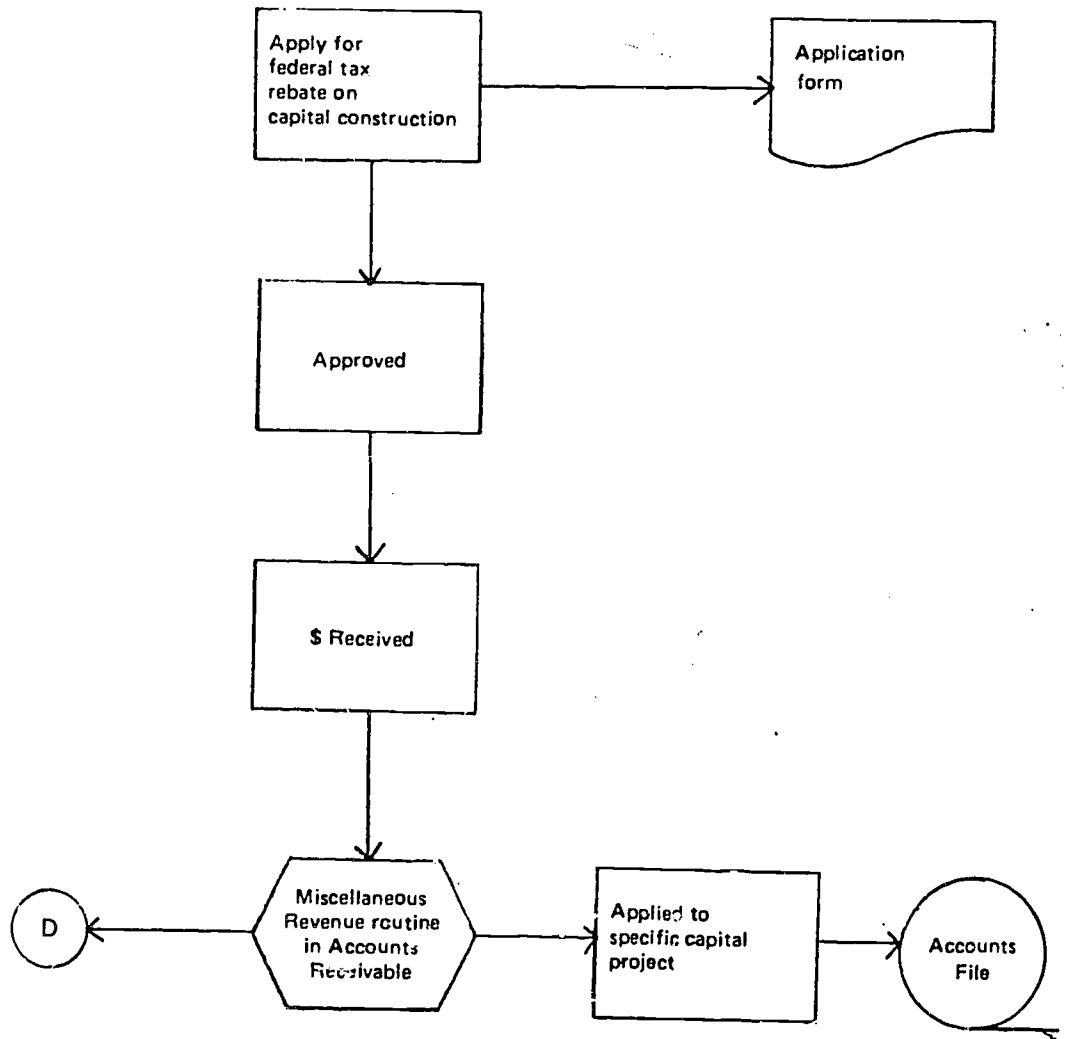
2.3.2.1 ACCOUNTING FUNCTION: General Accounting – Capital



2.3.2.1 (cont'd)

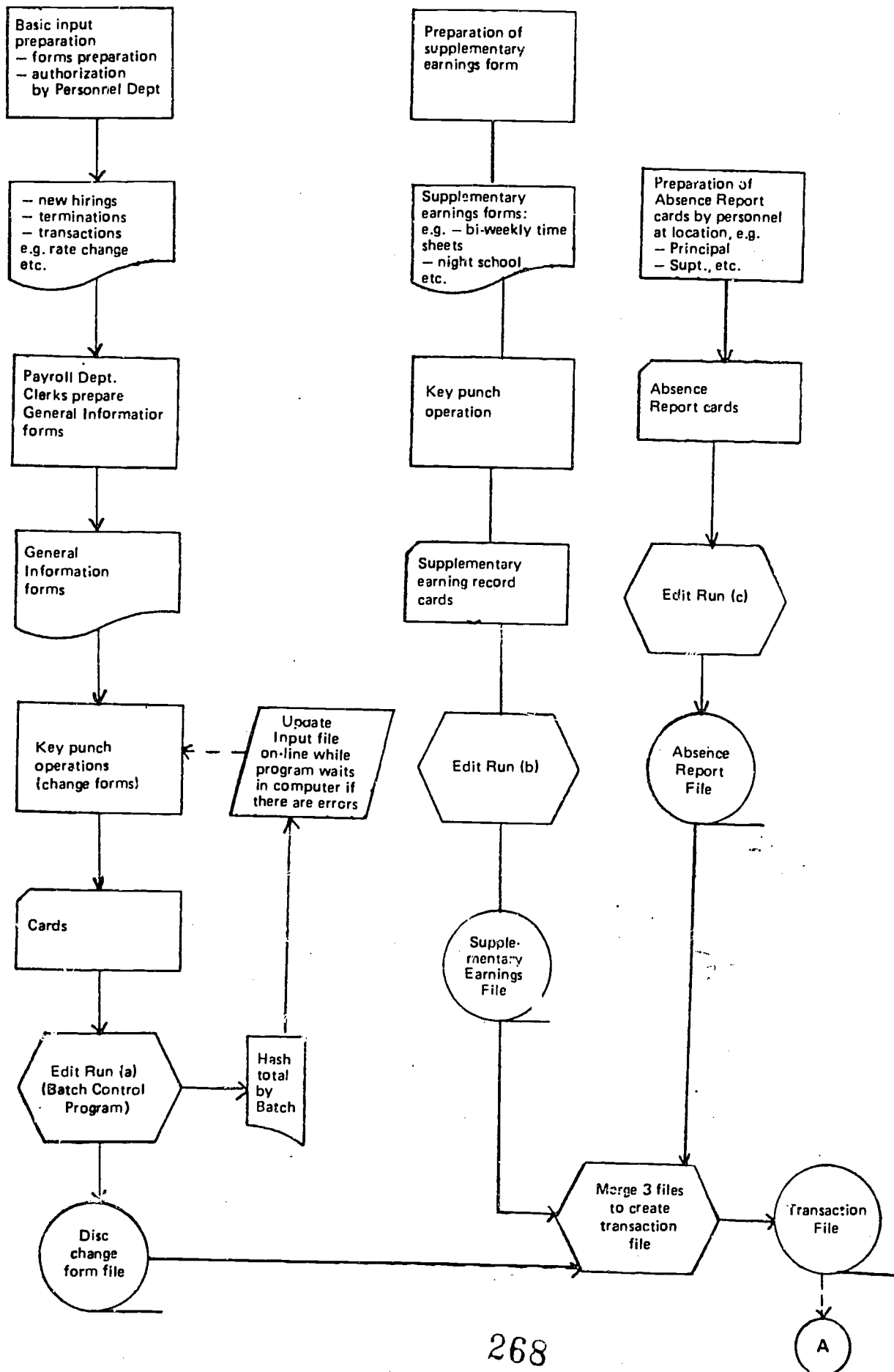


2.3.2.2 ACCOUNTING FUNCTION: General Accounting – Sales Tax Rebate Routine on Capital Construction

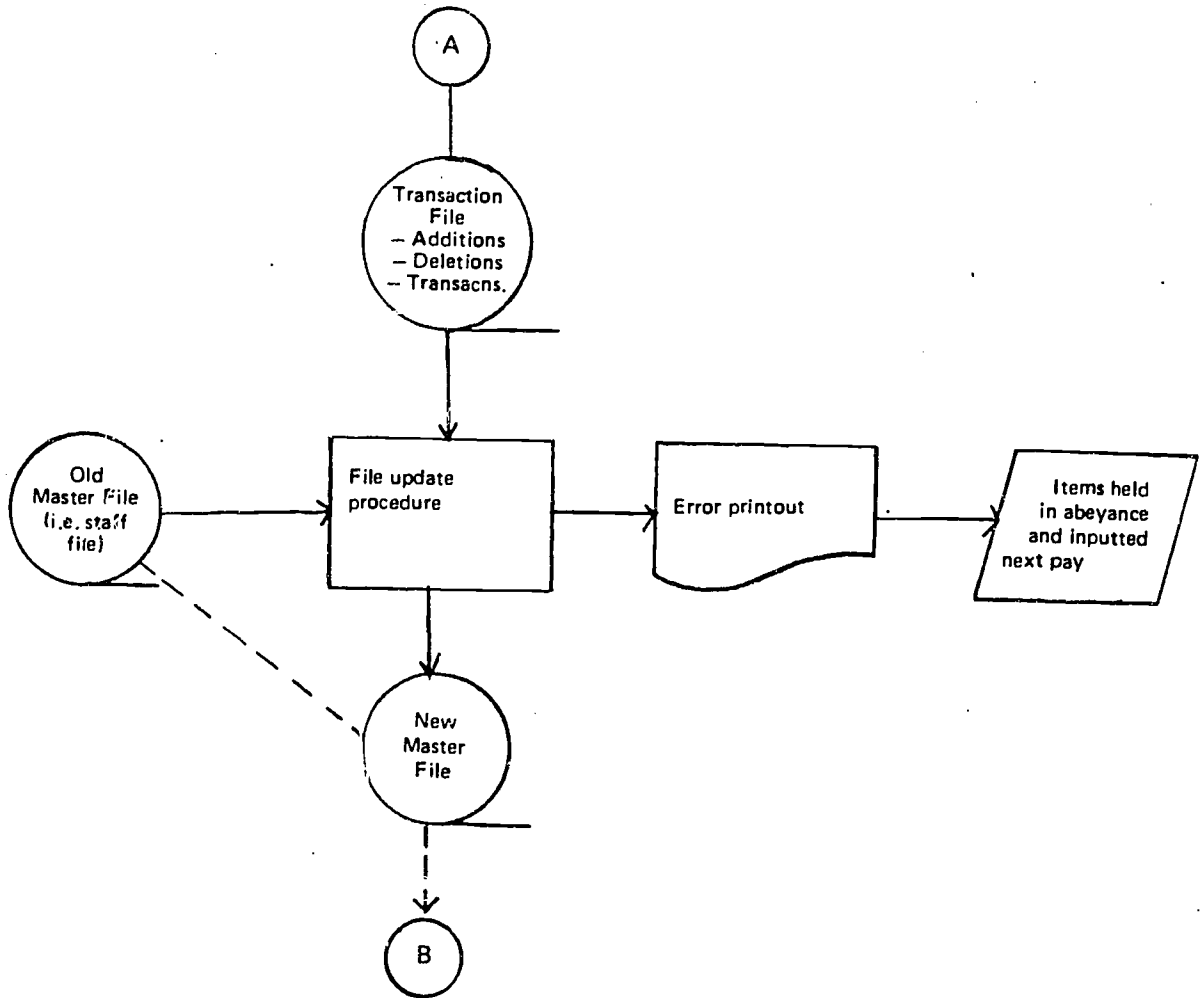


2.4.1

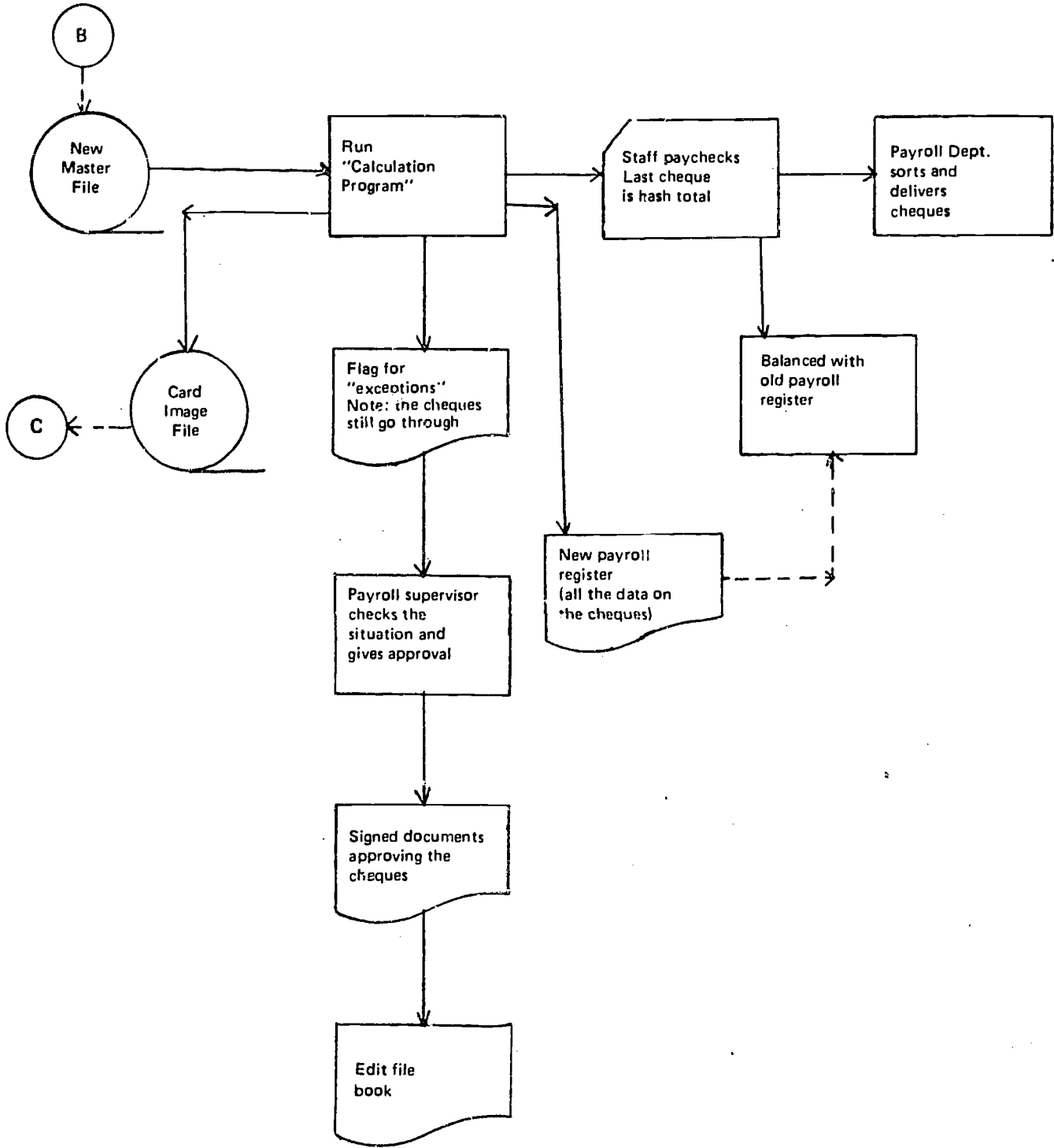
ACCOUNTING FUNCTION: Payroll – Phase I – Create Transaction File



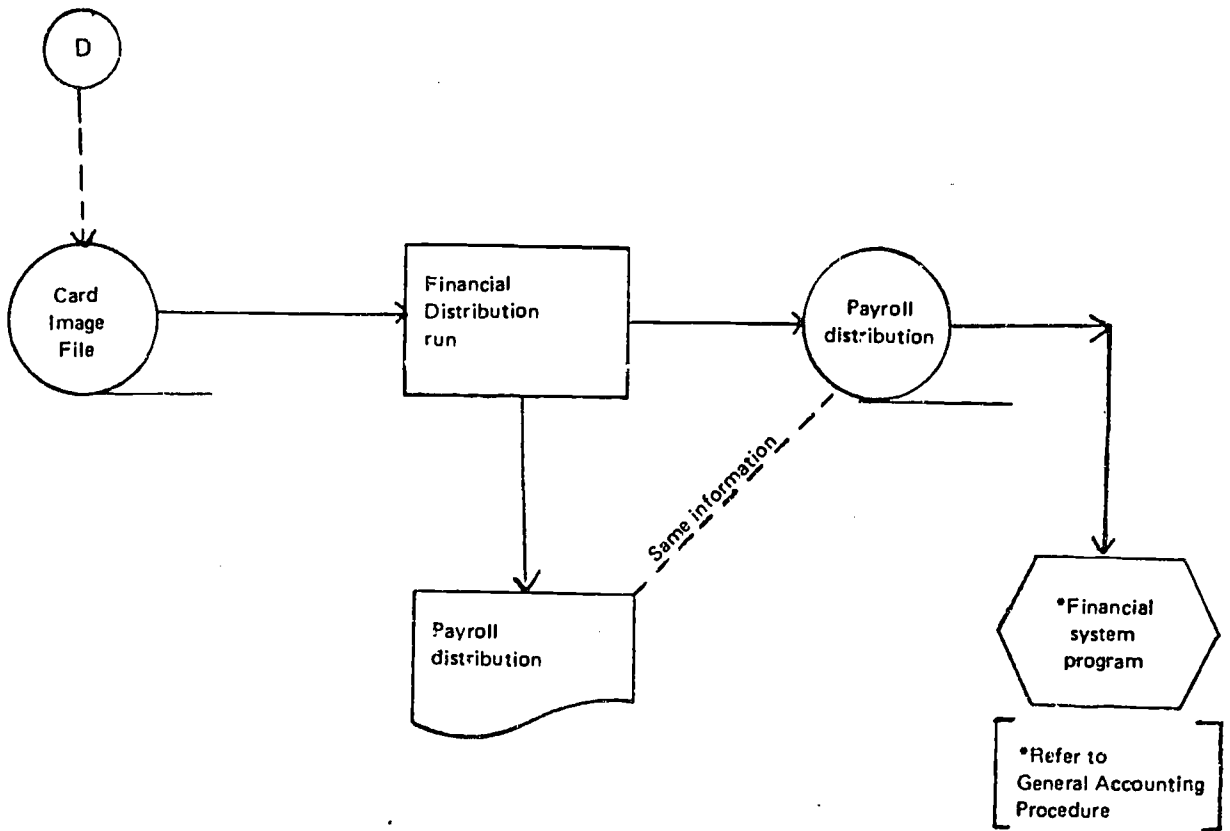
2.4.2 ACCOUNTING FUNCTION: Payroll – Phase II – Master File Update



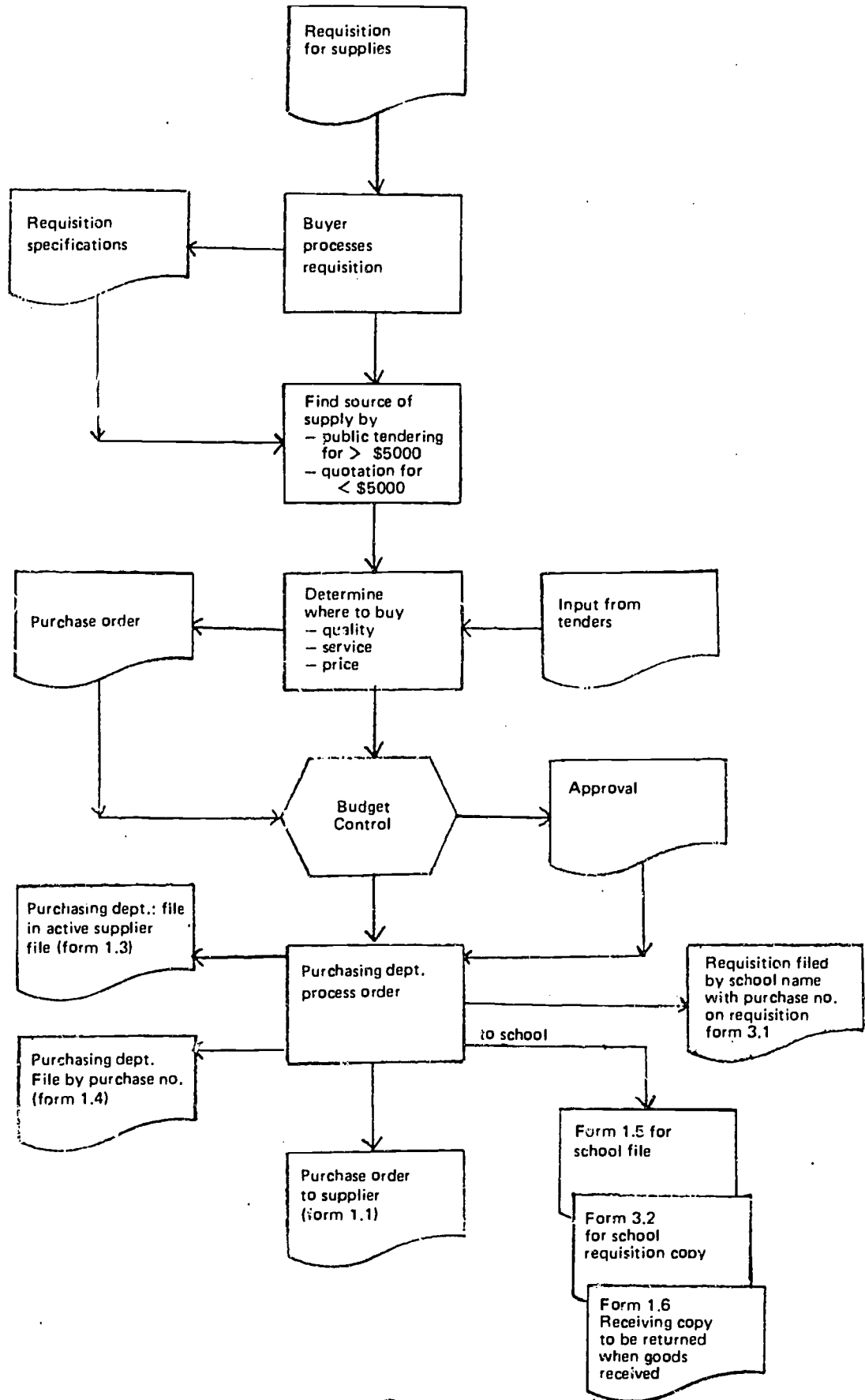
2.4.3 ACCOUNTING FUNCTION: Payroll – Phase III – Preparation of Paychecks



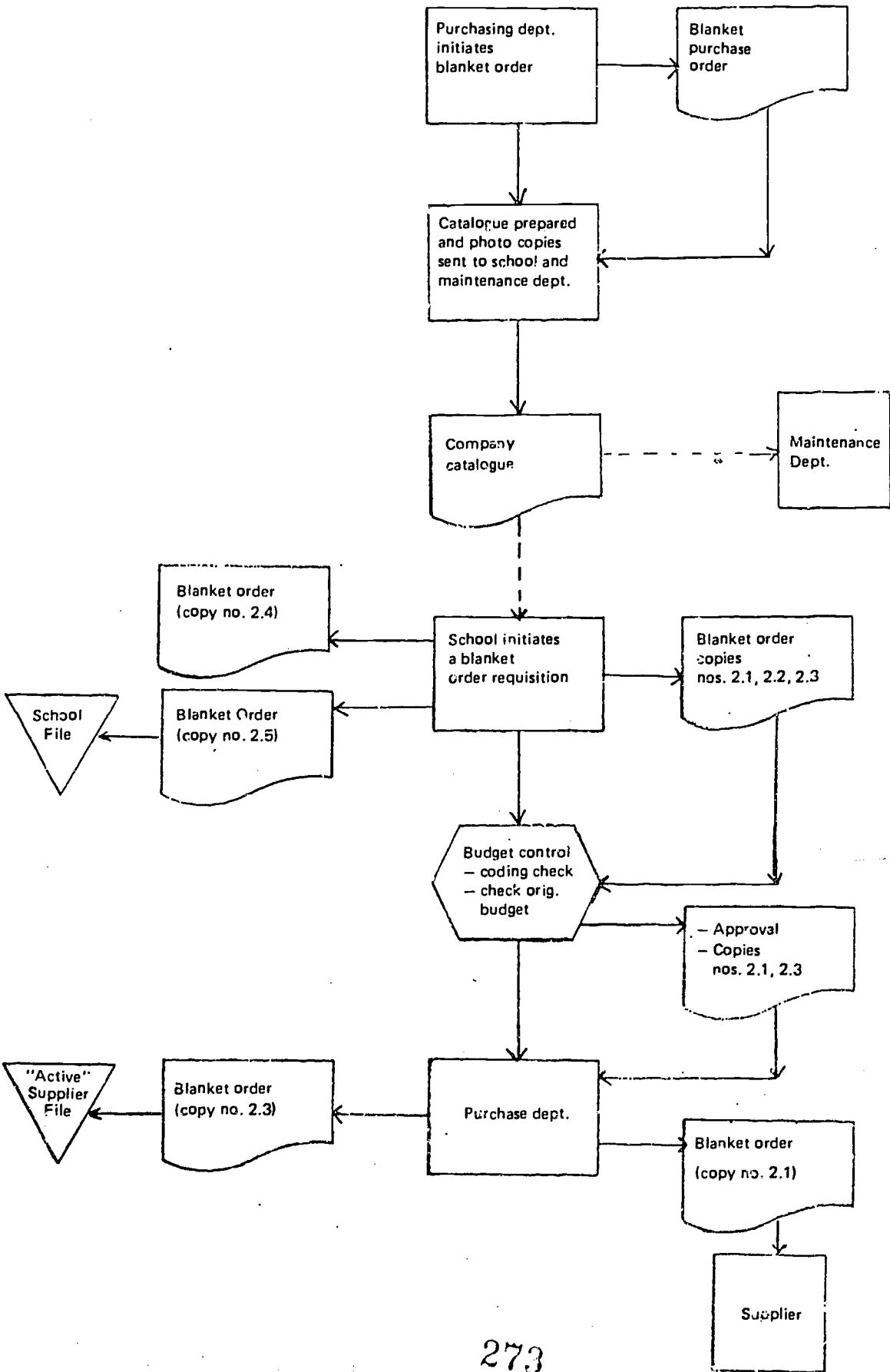
2.4.4 ACCOUNTING FUNCTION: Payroll – Phase IV – Financial Distribution Report



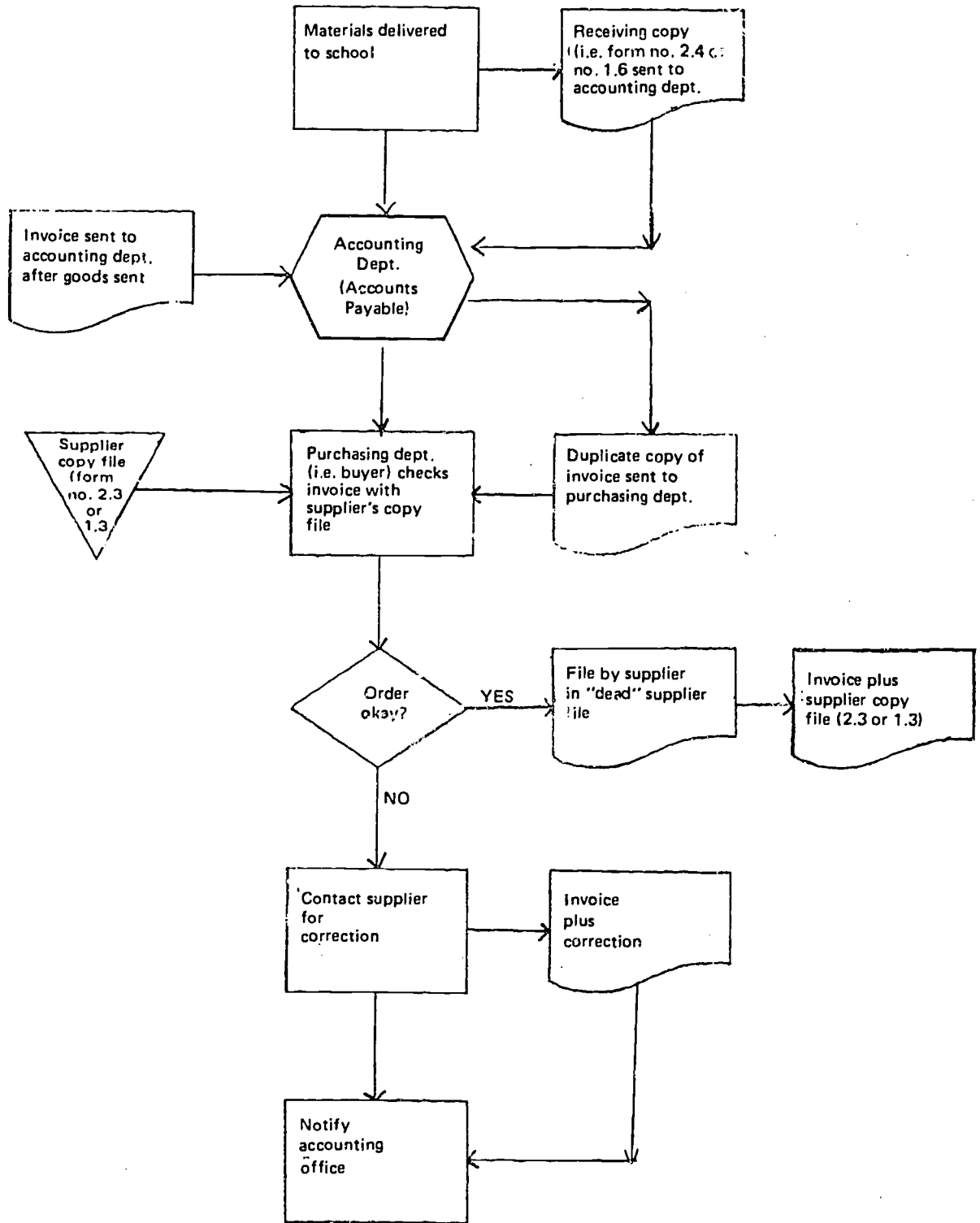
3.1.1 SUPPLY FUNCTION: Purchasing – General Procedure



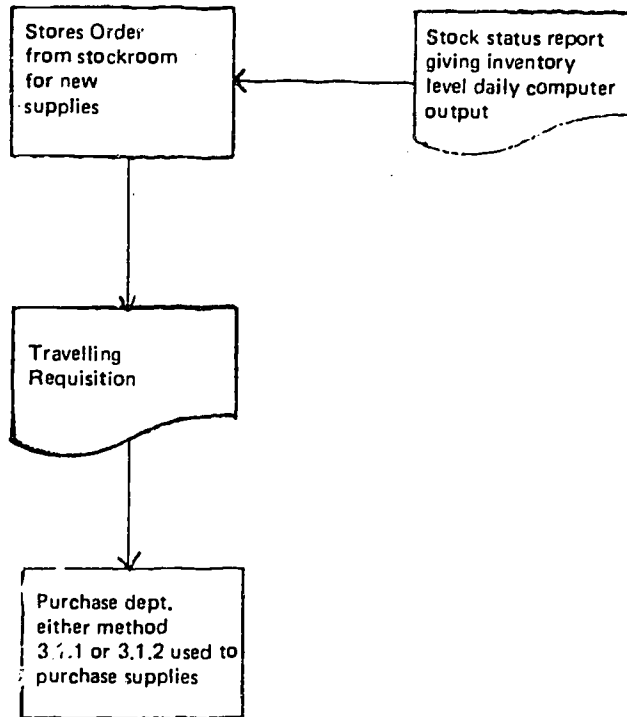
3.1.2 SUPPLY FUNCTION: Purchasing – Blanket Ordering Method for Purchasing



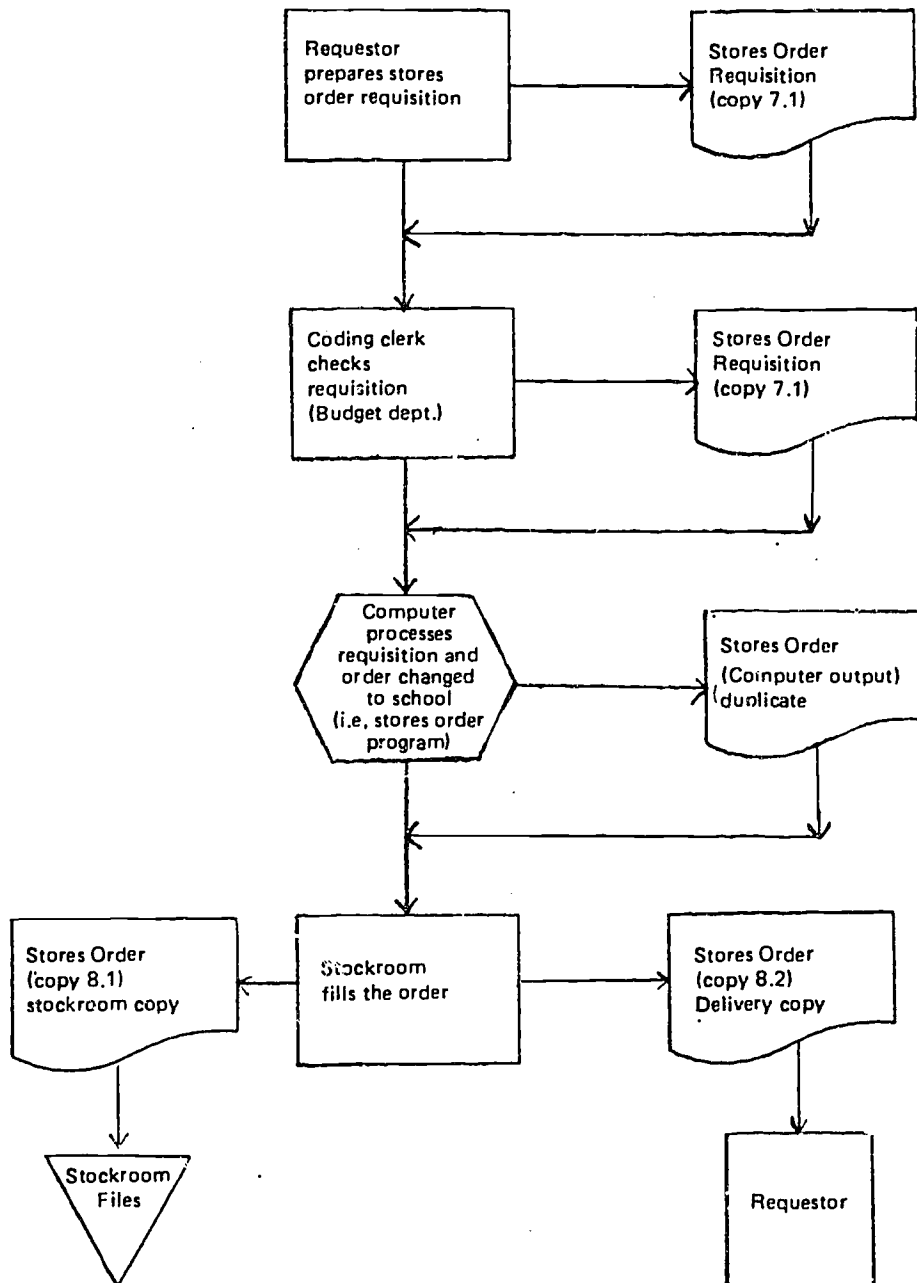
3.1.3 SUPPLY FUNCTION: Purchasing – Invoice Processing



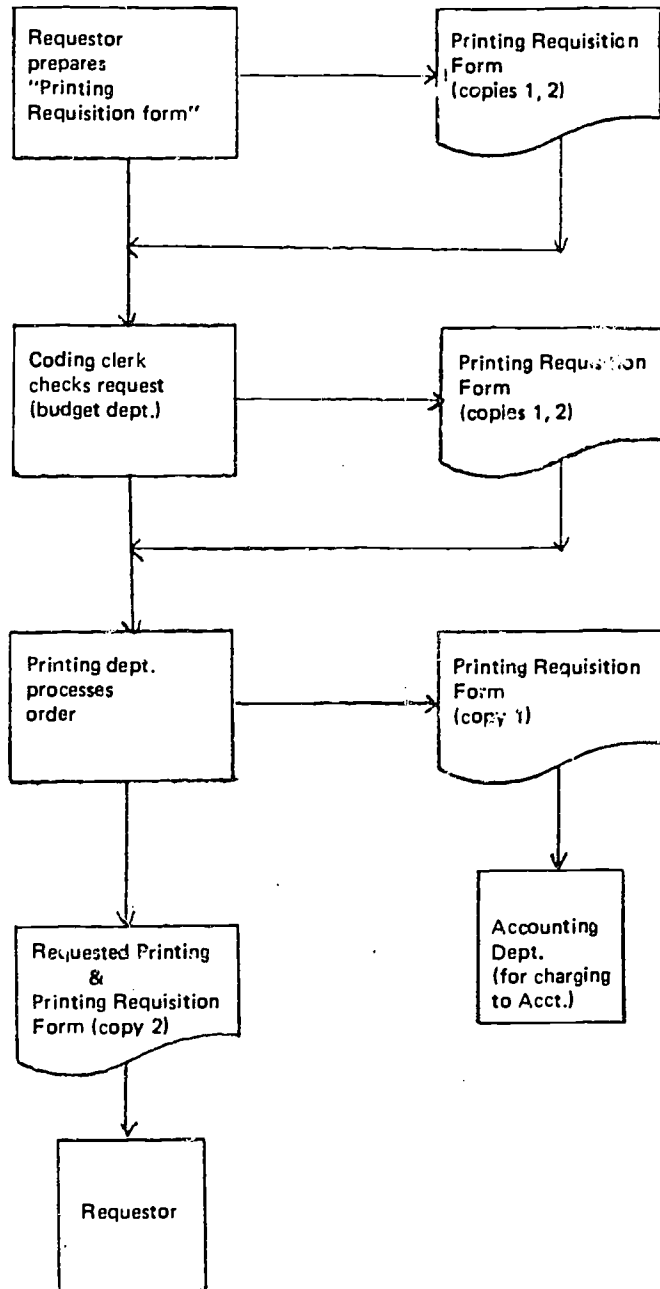
3.2.1 SUPPLY FUNCTION: Stores – Purchasing for stockroom (flow into stores)

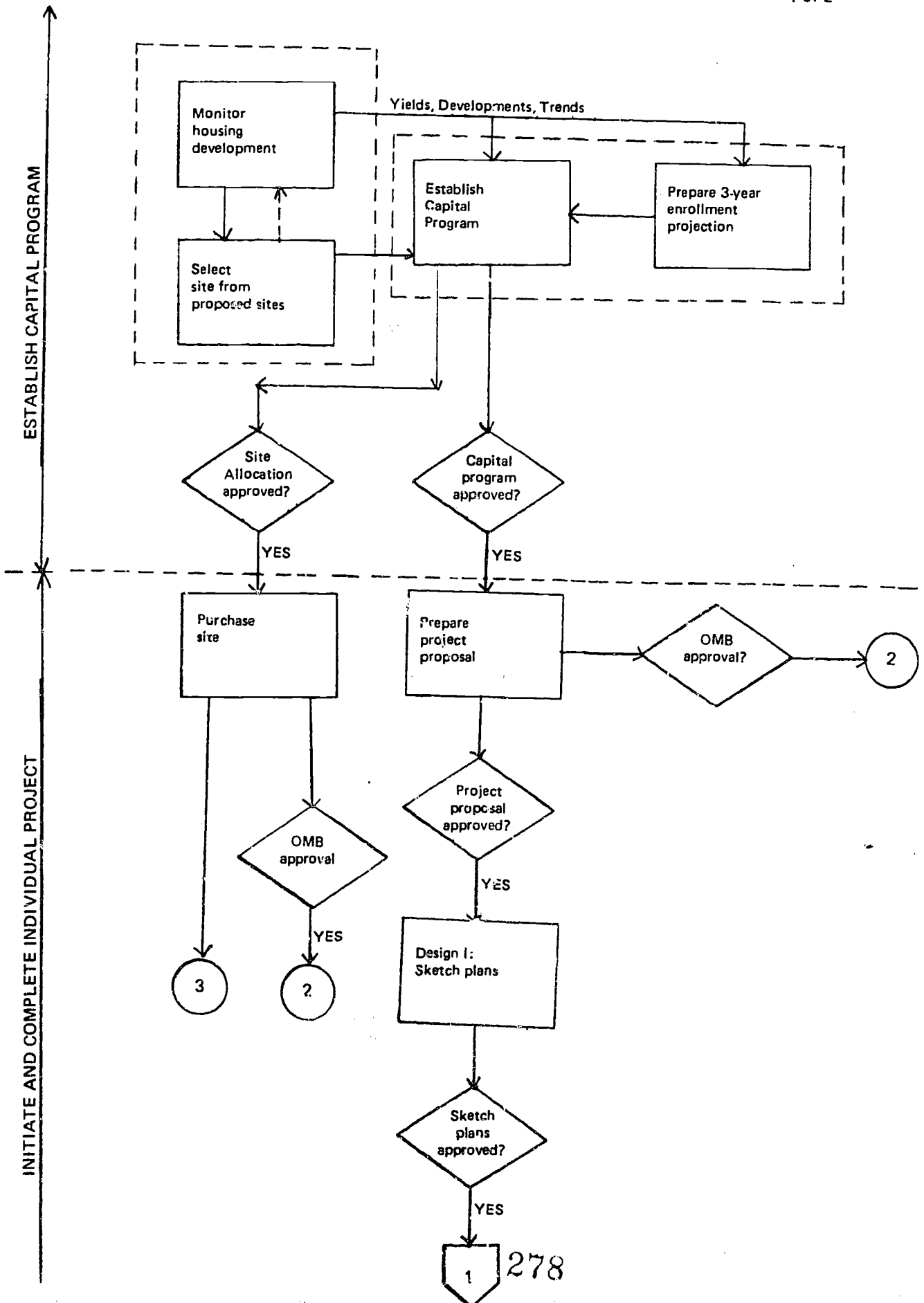


3.2.2 SUPPLY FUNCTION: Stores – Requisition of Supplies (flow out of stores)

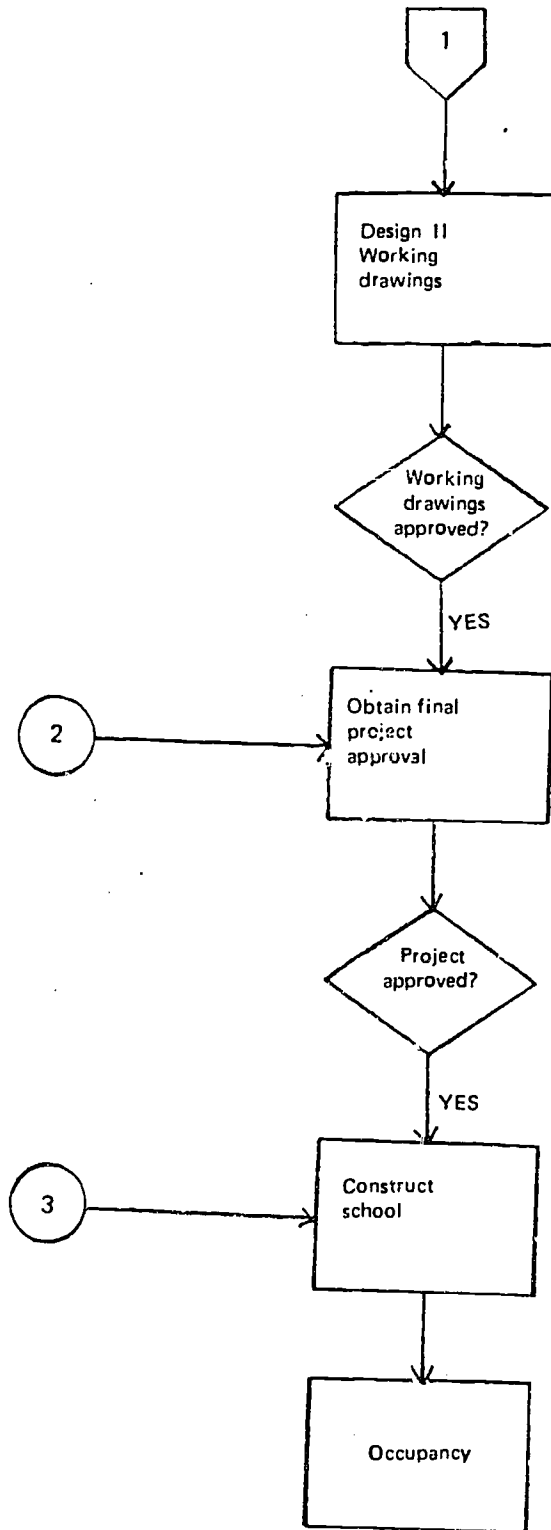


3.3 SUPPLY FUNCTION: Request for Printing Services

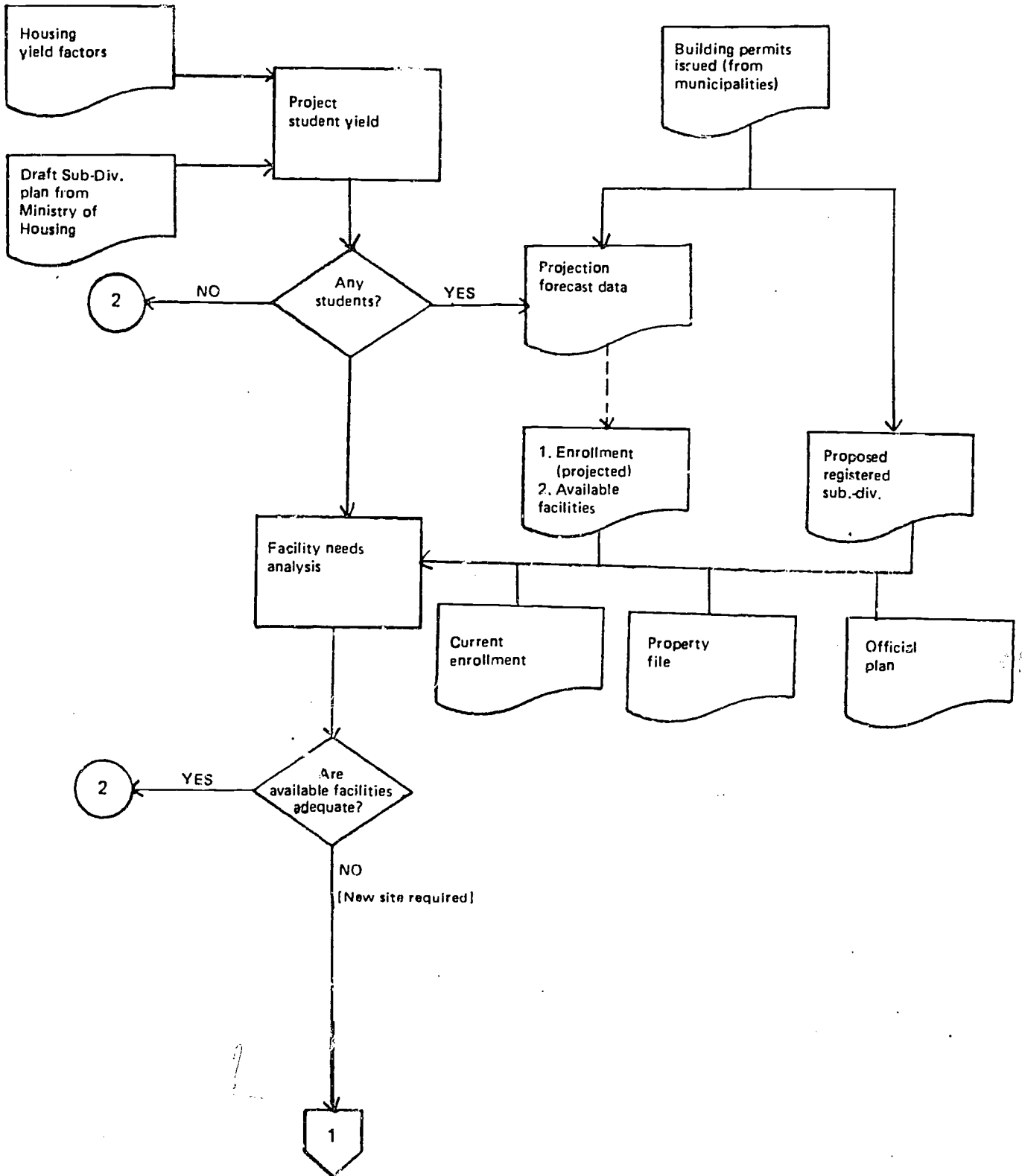


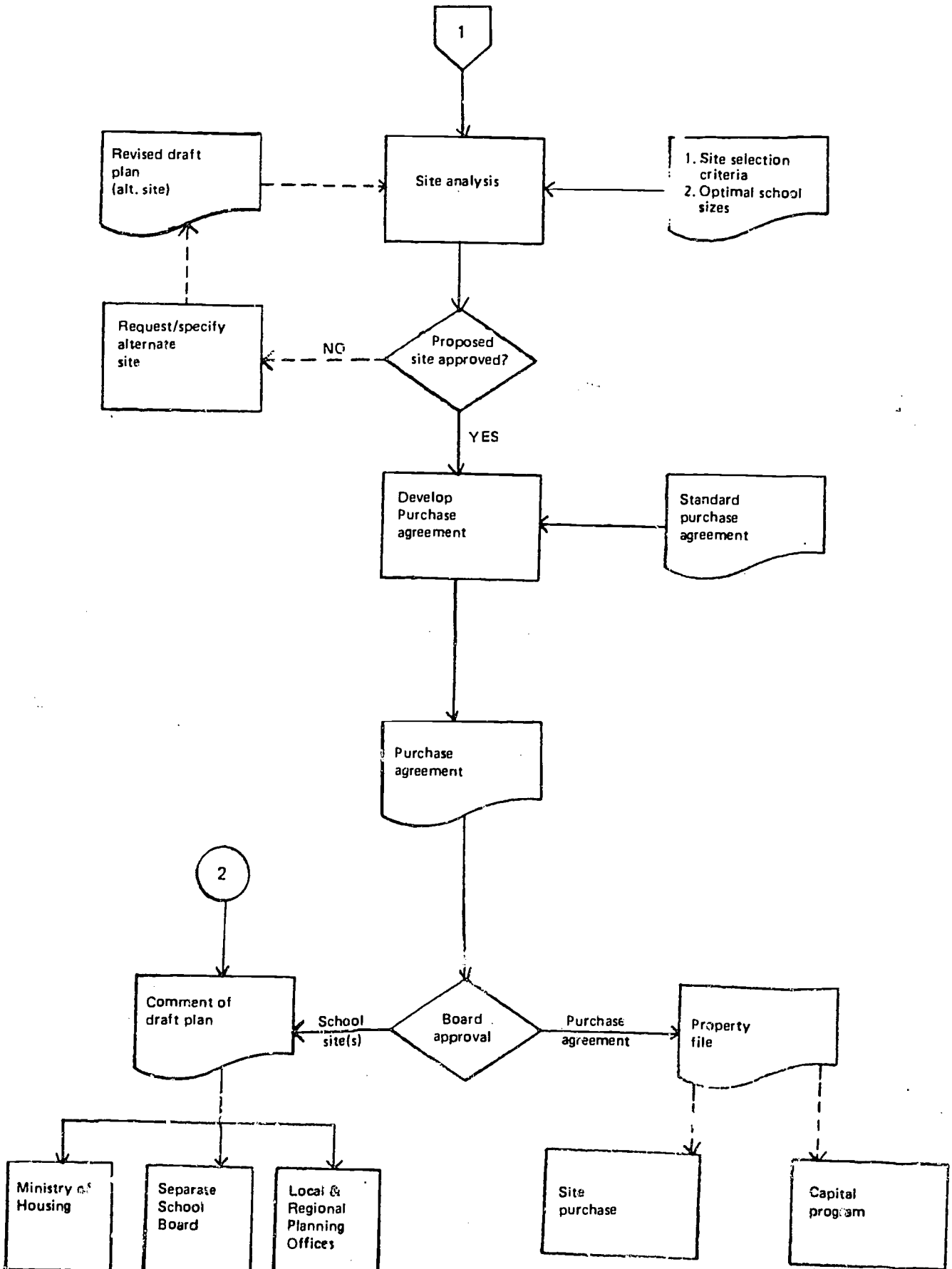


INITIATE AND COMPLETE INDIVIDUAL PROJECT

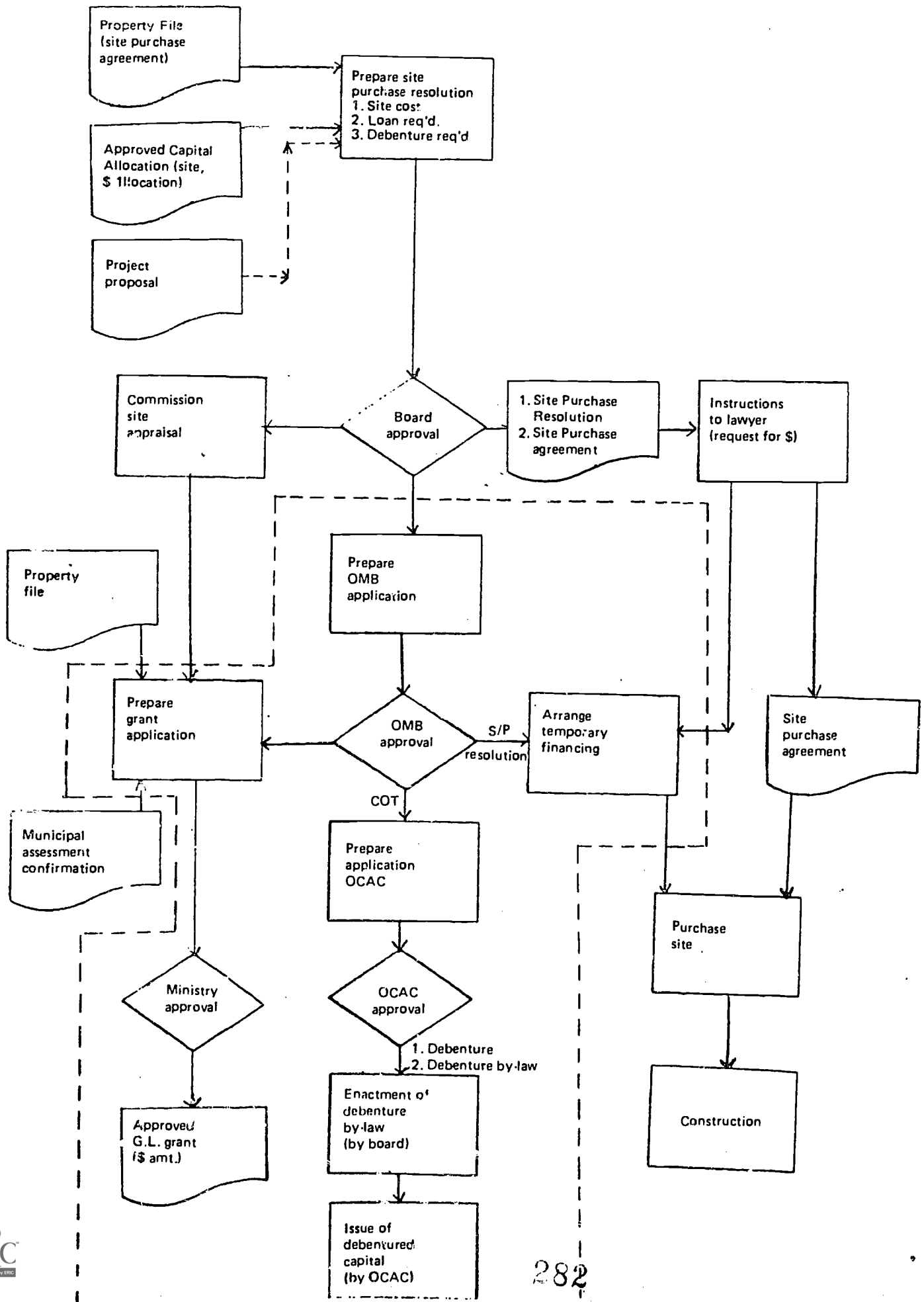


4.1.1 & 4.1.2 ACCOMMODATION SUPPLY: Capital Program – Monitor Housing Development/Site Selection
1 of 2



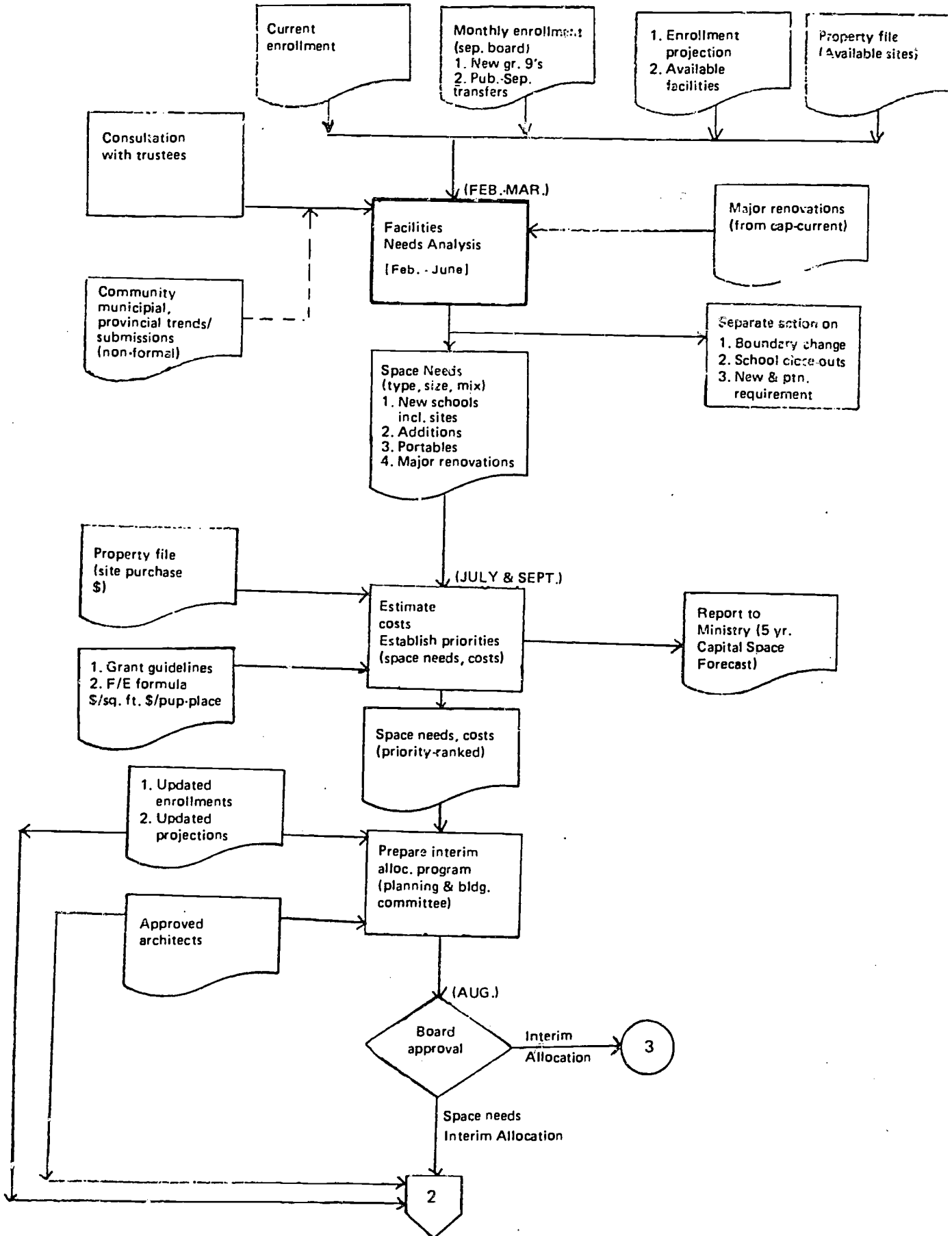


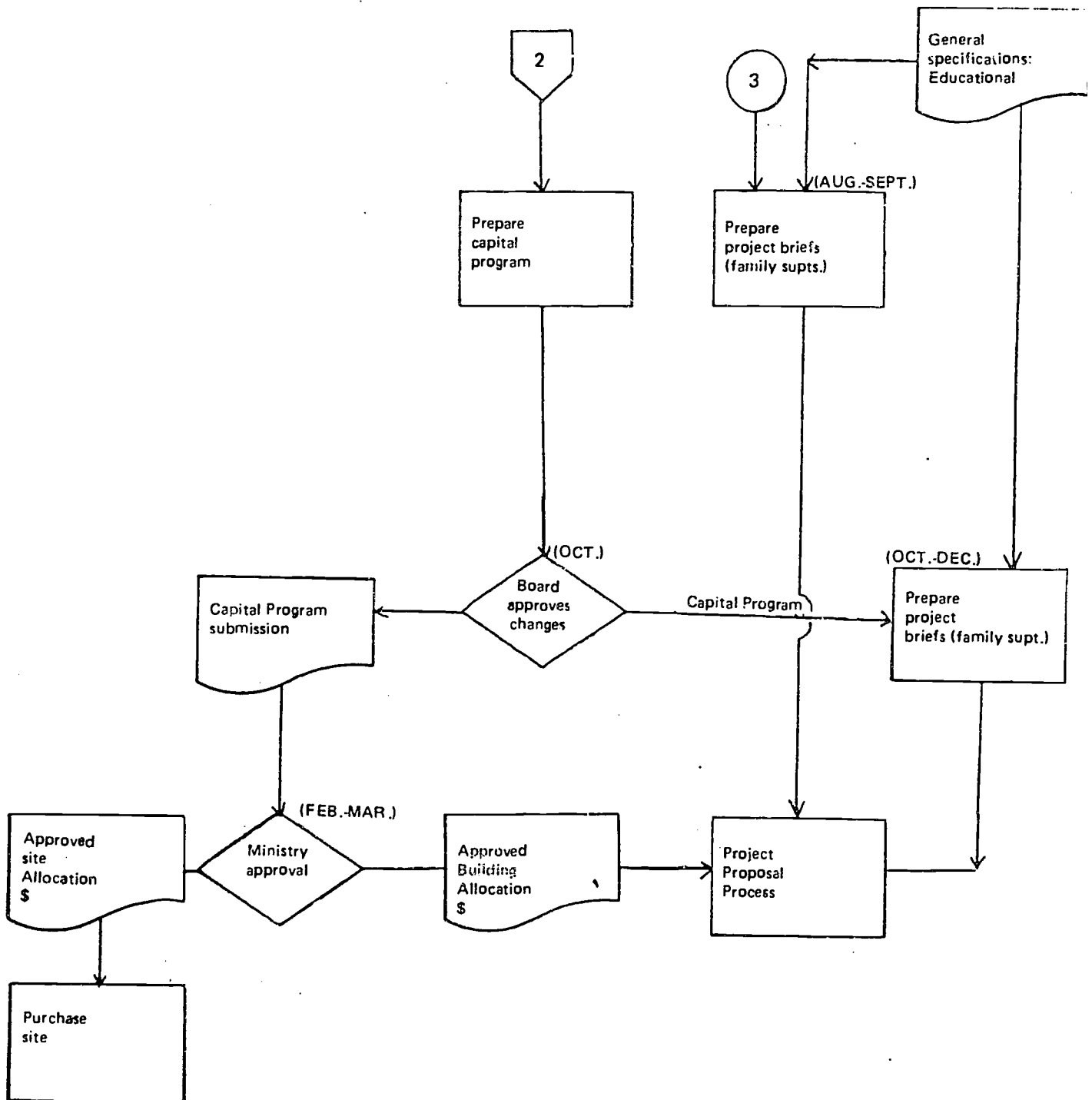
4.1.2.1 ACCOMMODATION SUPPLY: Capital Program – Site Purchase



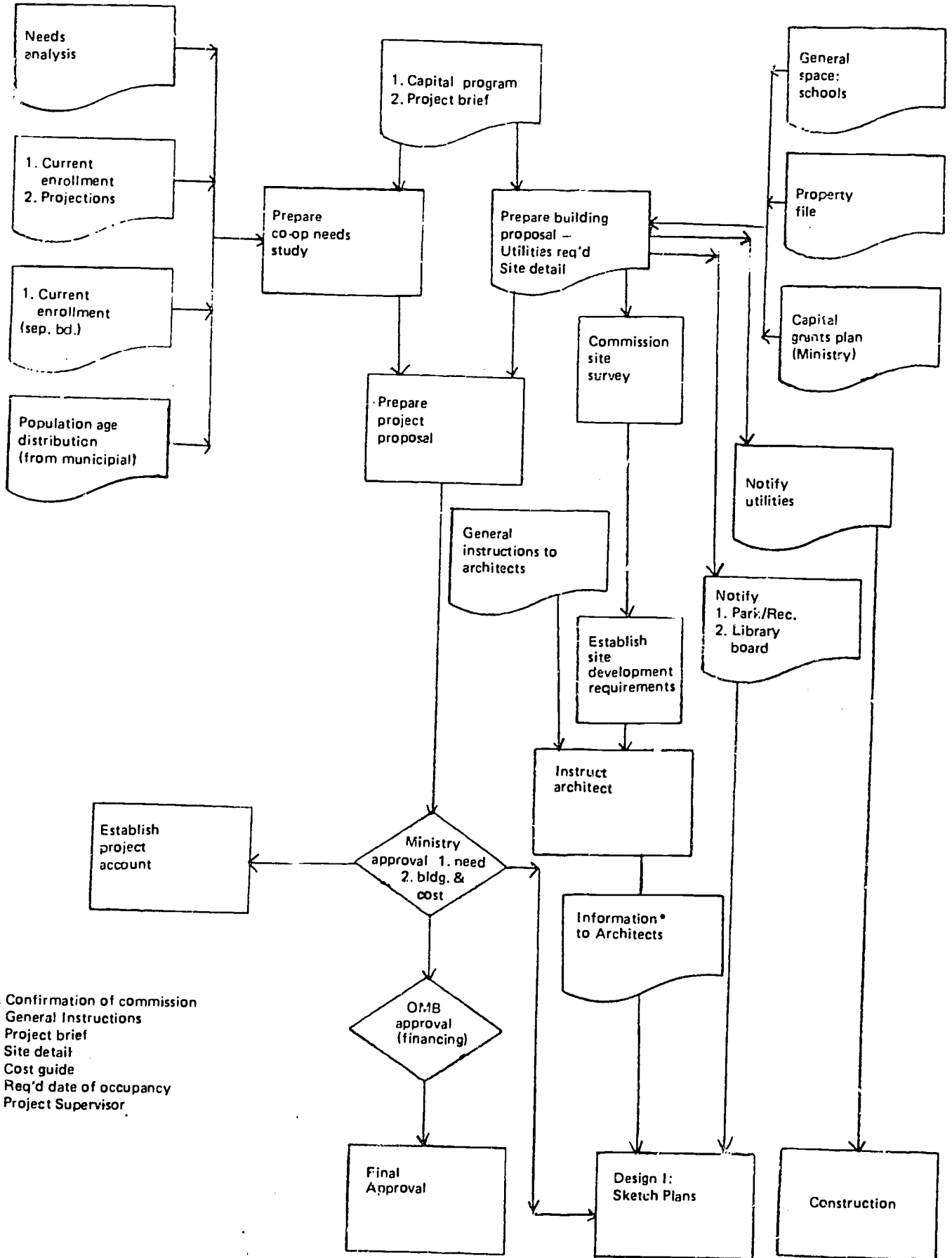
4.1.3 ACCOMMODATION SUPPLY: Capital Program – Establish capital program

1 of 2

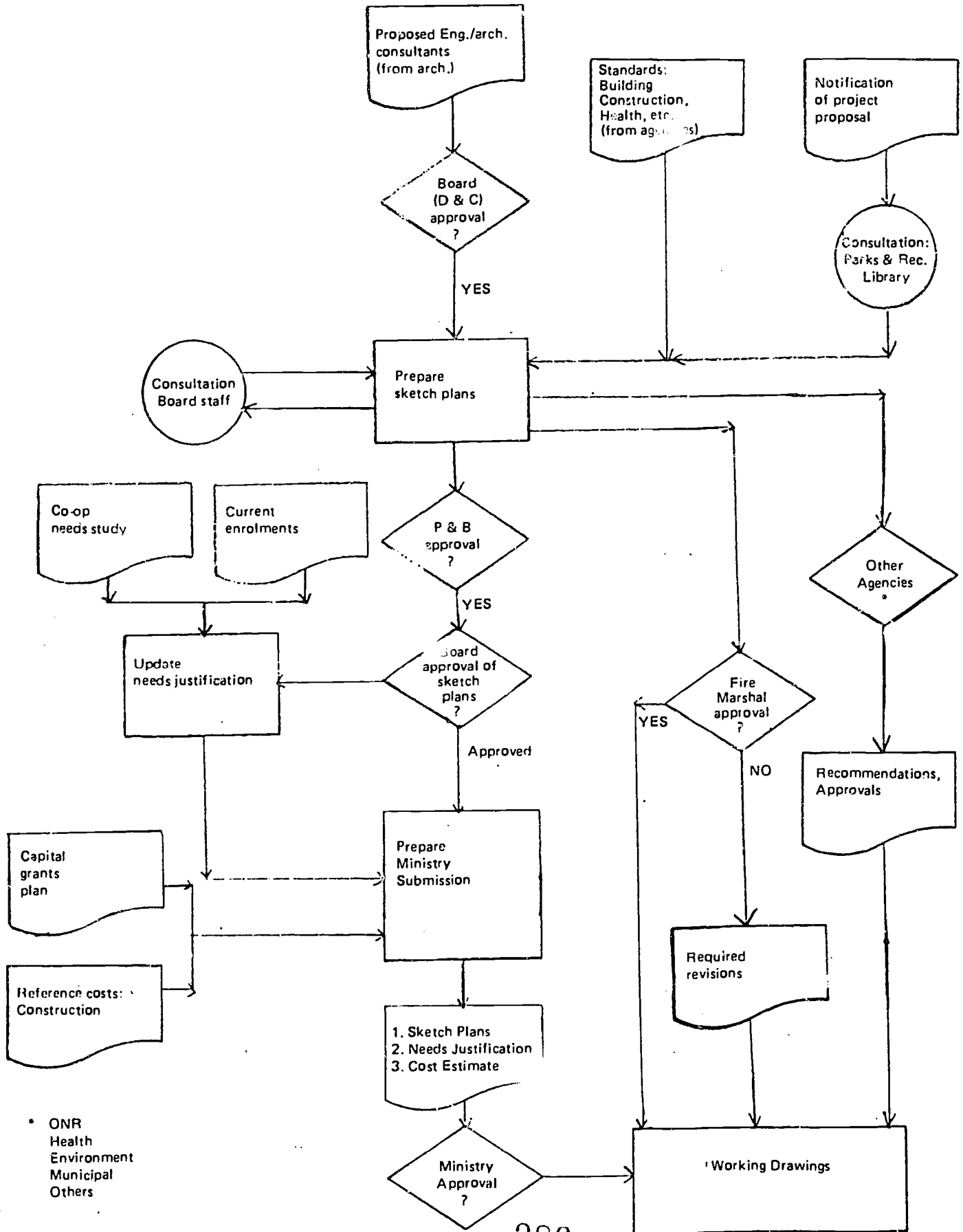




4.1.4 ACCOMMODATION SUPPLY: Capital Program – Project Proposal Process

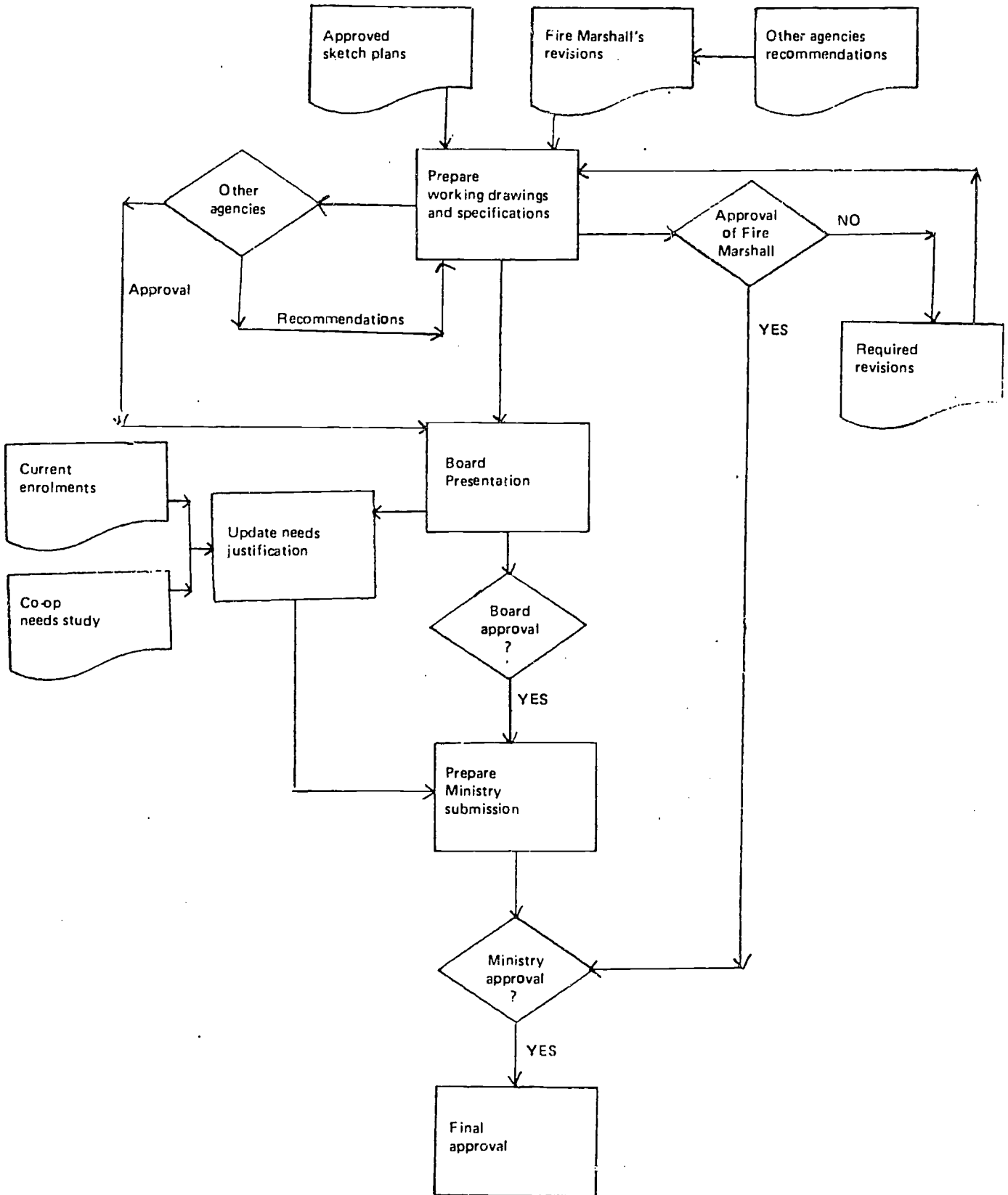


4.1.5 ACCOMMODATION SUPPLY: Capital Program -- Design I (Sketch Plans)

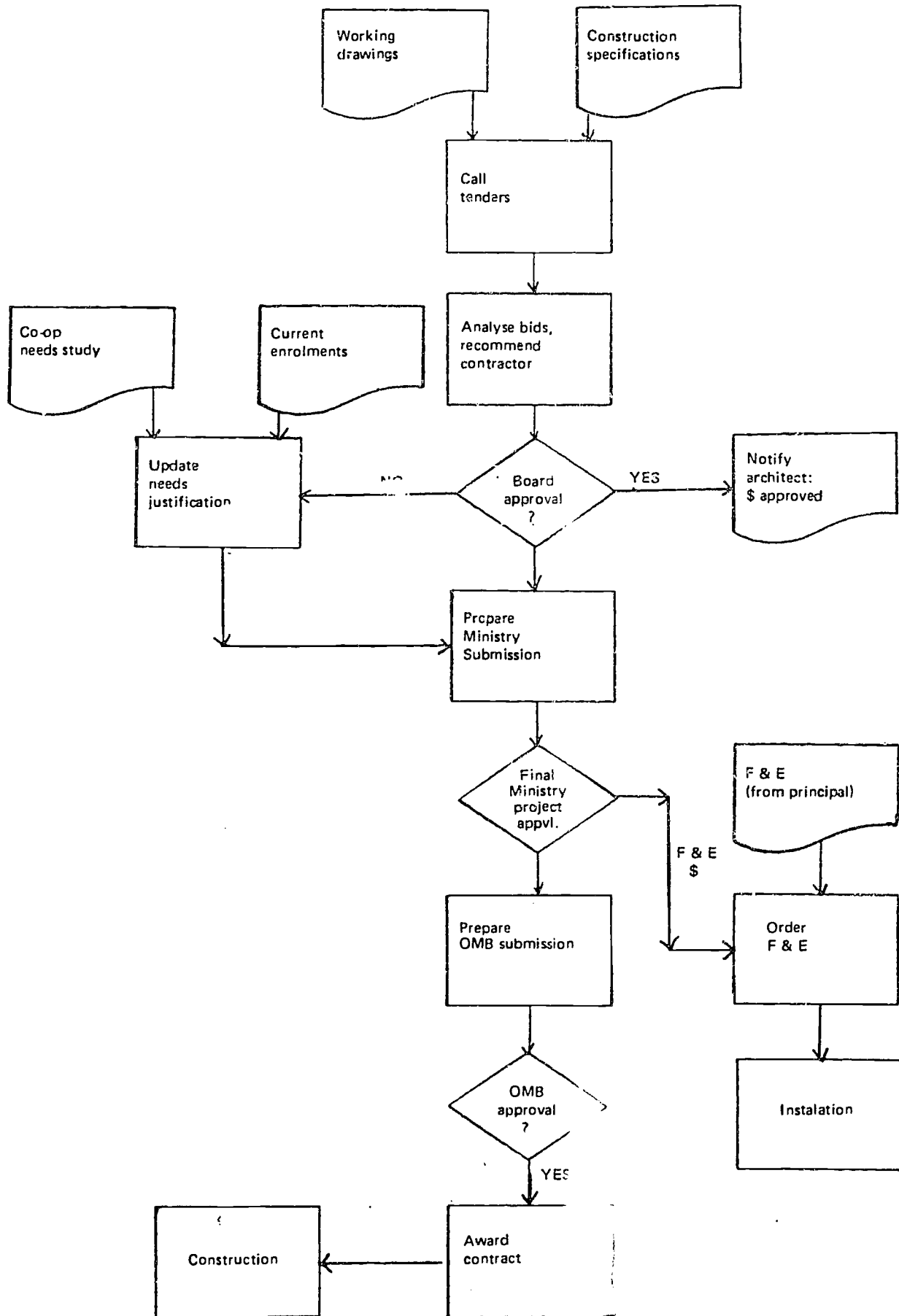


- ONR
- Health
- Environment
- Municipal
- Others

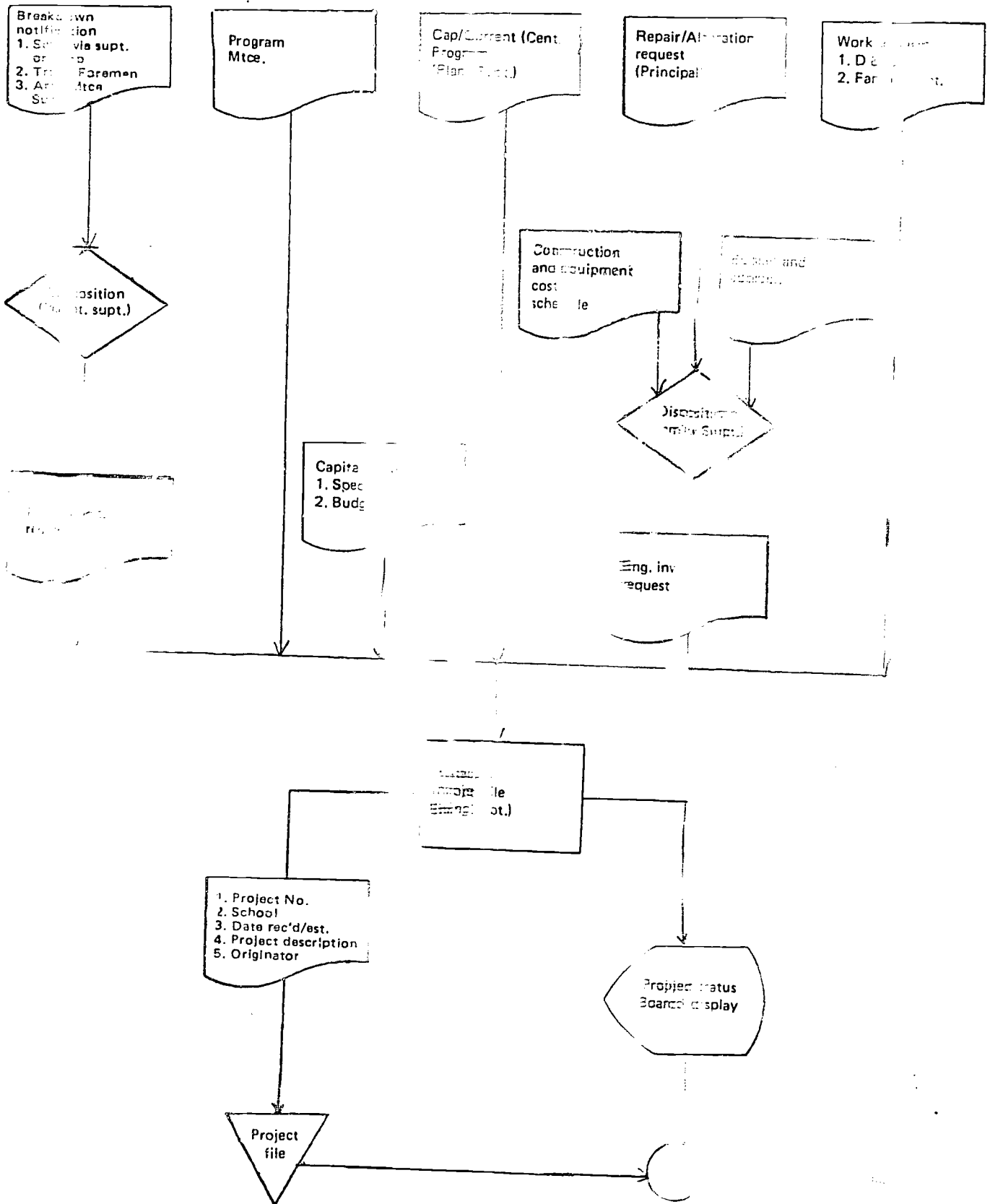
4.1.6 ACCOMMODATION SUPPLY: Capital Program – Design II (Working Drawings)



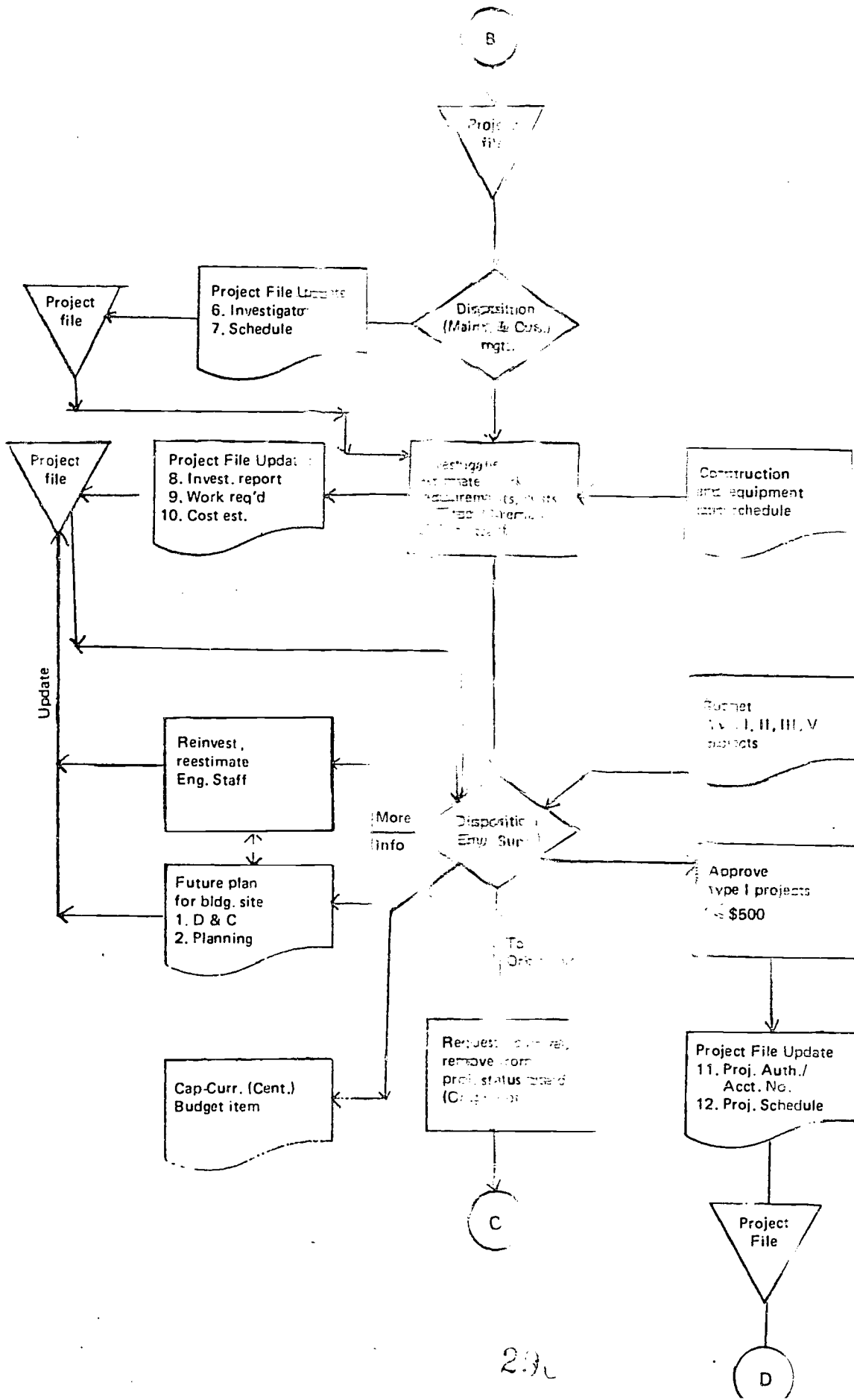
4.1.7 ACCOMMODATION SUPPLY: Capital Program – Final Project Approval



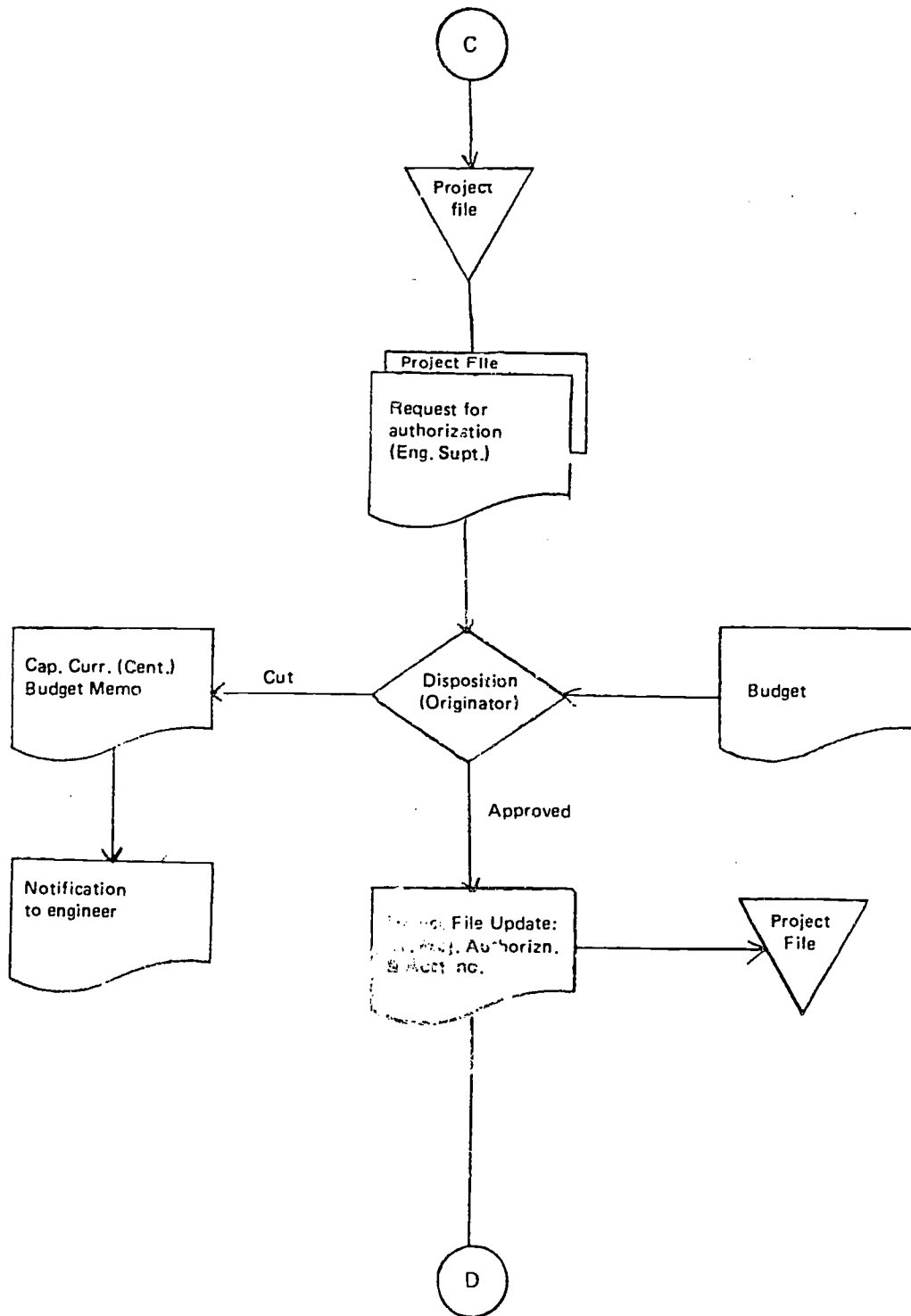
5.2.1 PLANT MAINTENANCE: Project Request



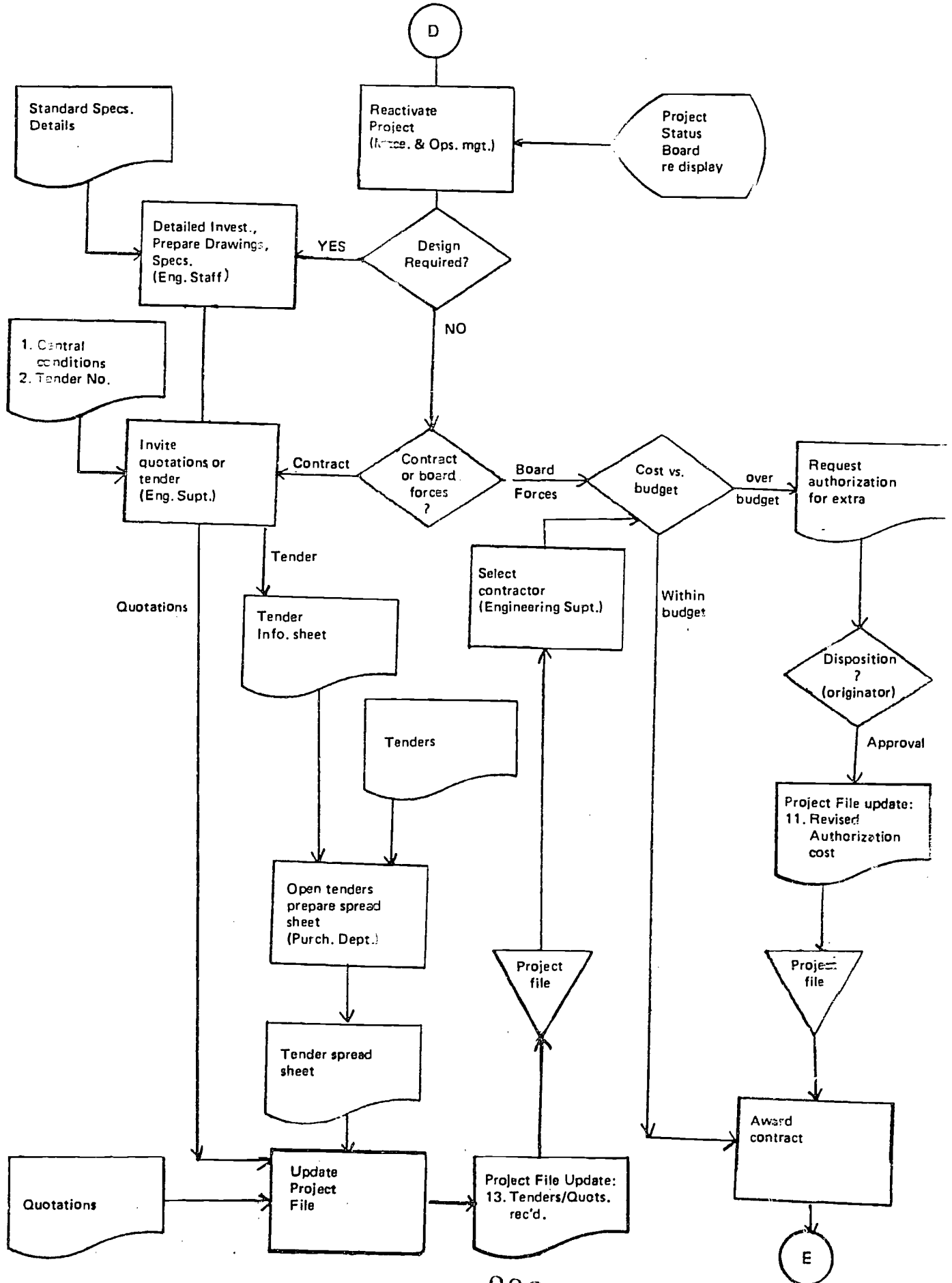
5.2.2 PLANT MAINTENANCE: Project Investigation



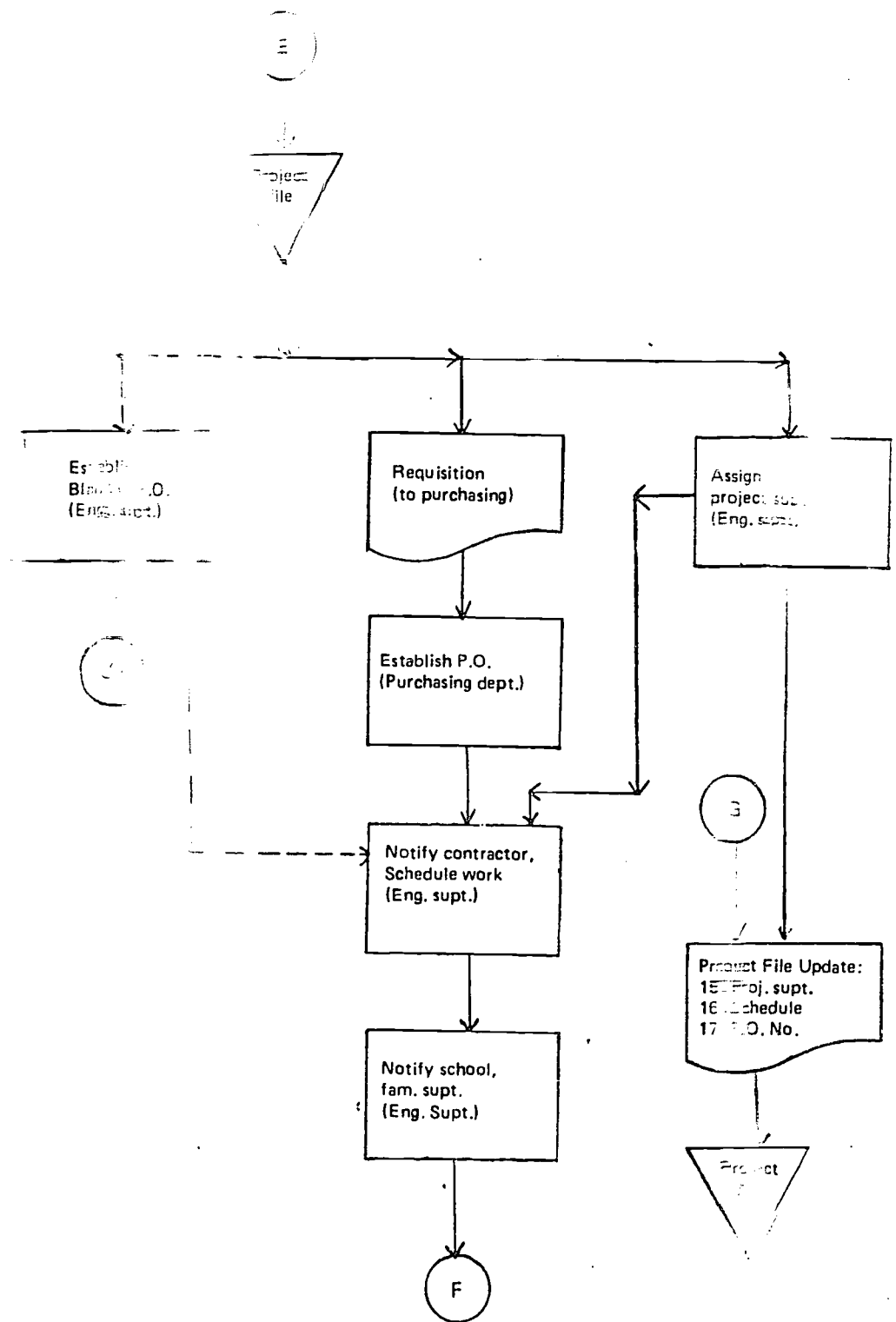
E.2.3 PLANT MAINTENANCE: Project Authorization



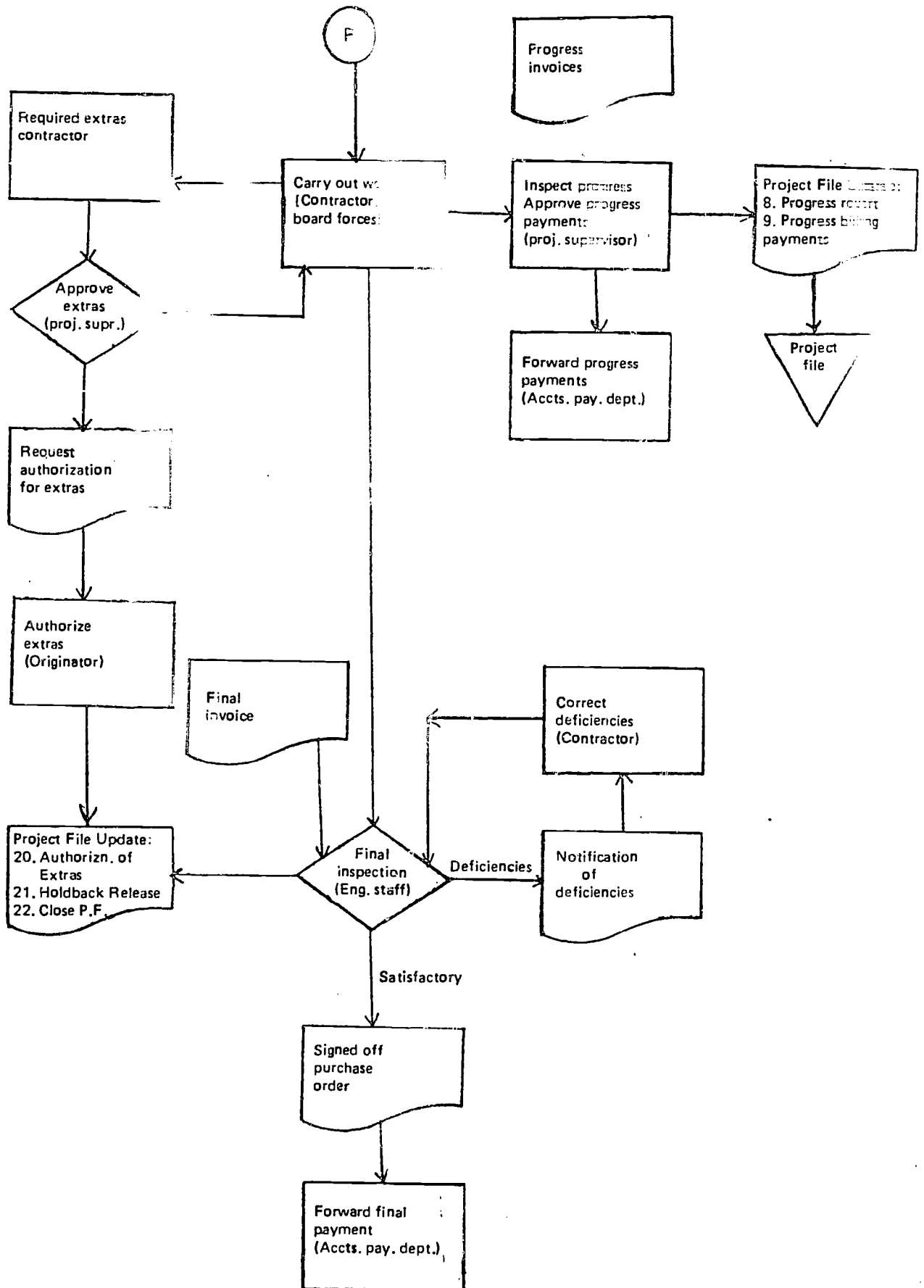
5.2.4 PLANT MAINTENANCE: Design, Contract



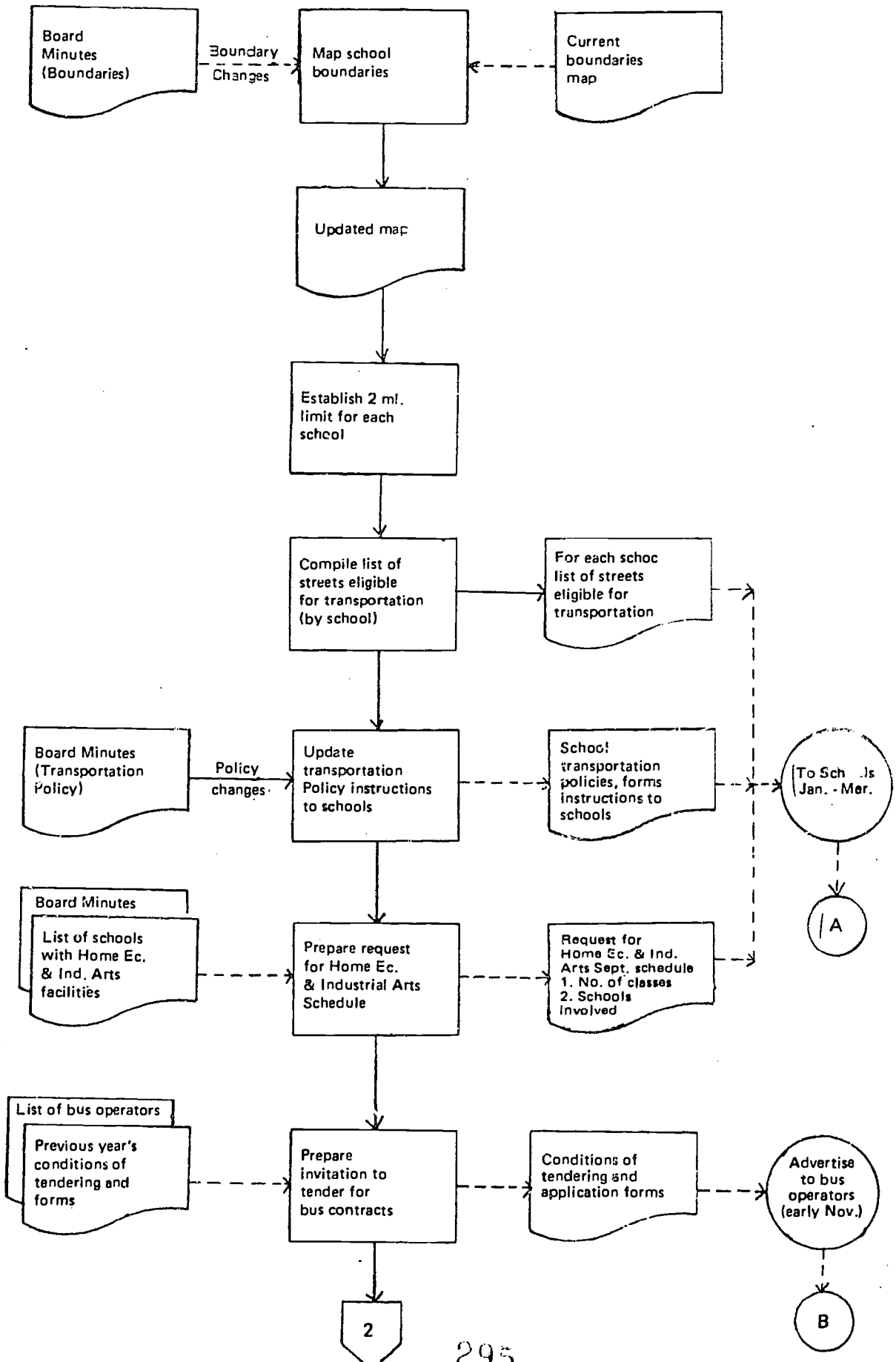
5.2.5 PLANT MAINTENANCE Project Supt.

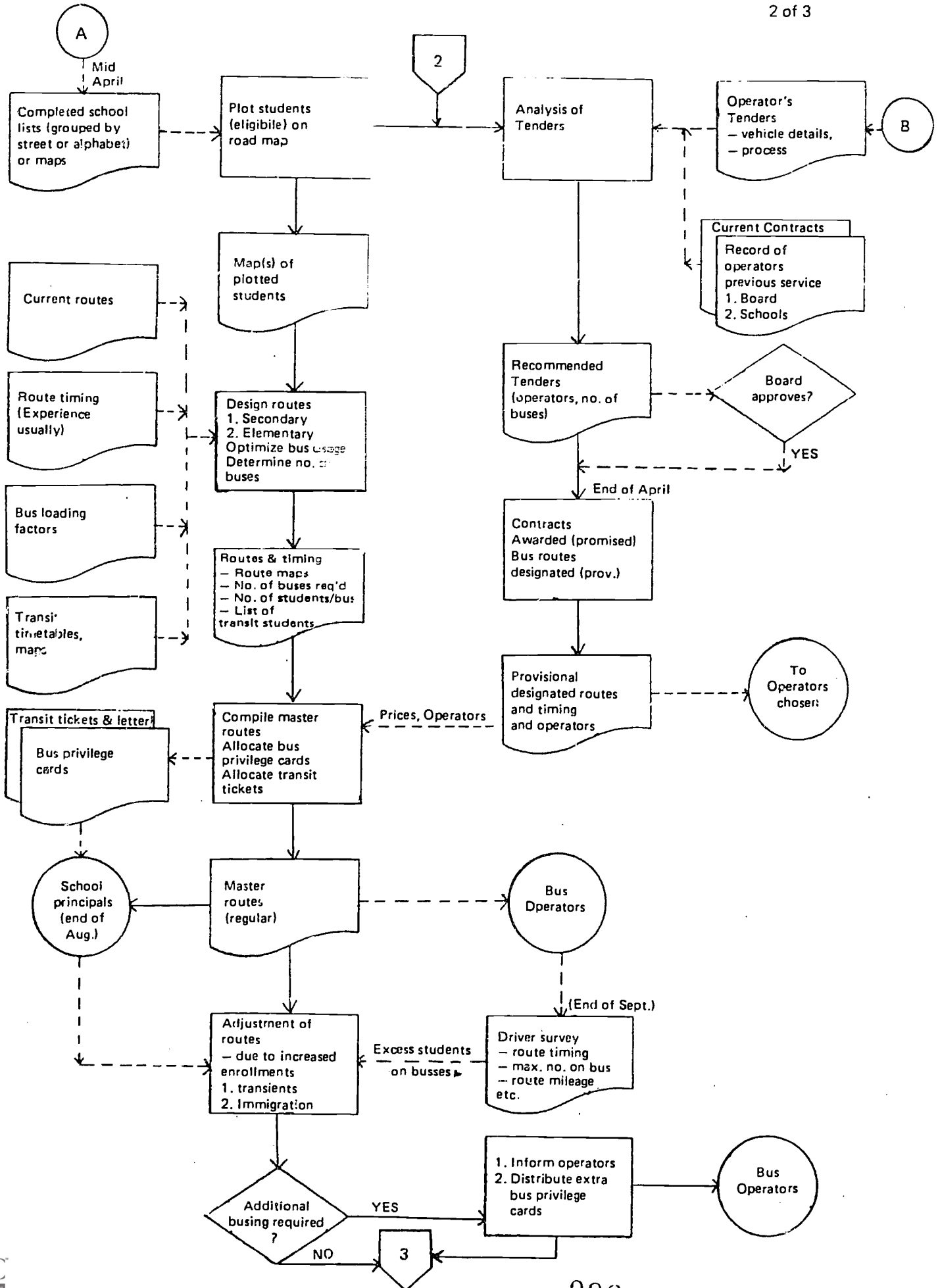


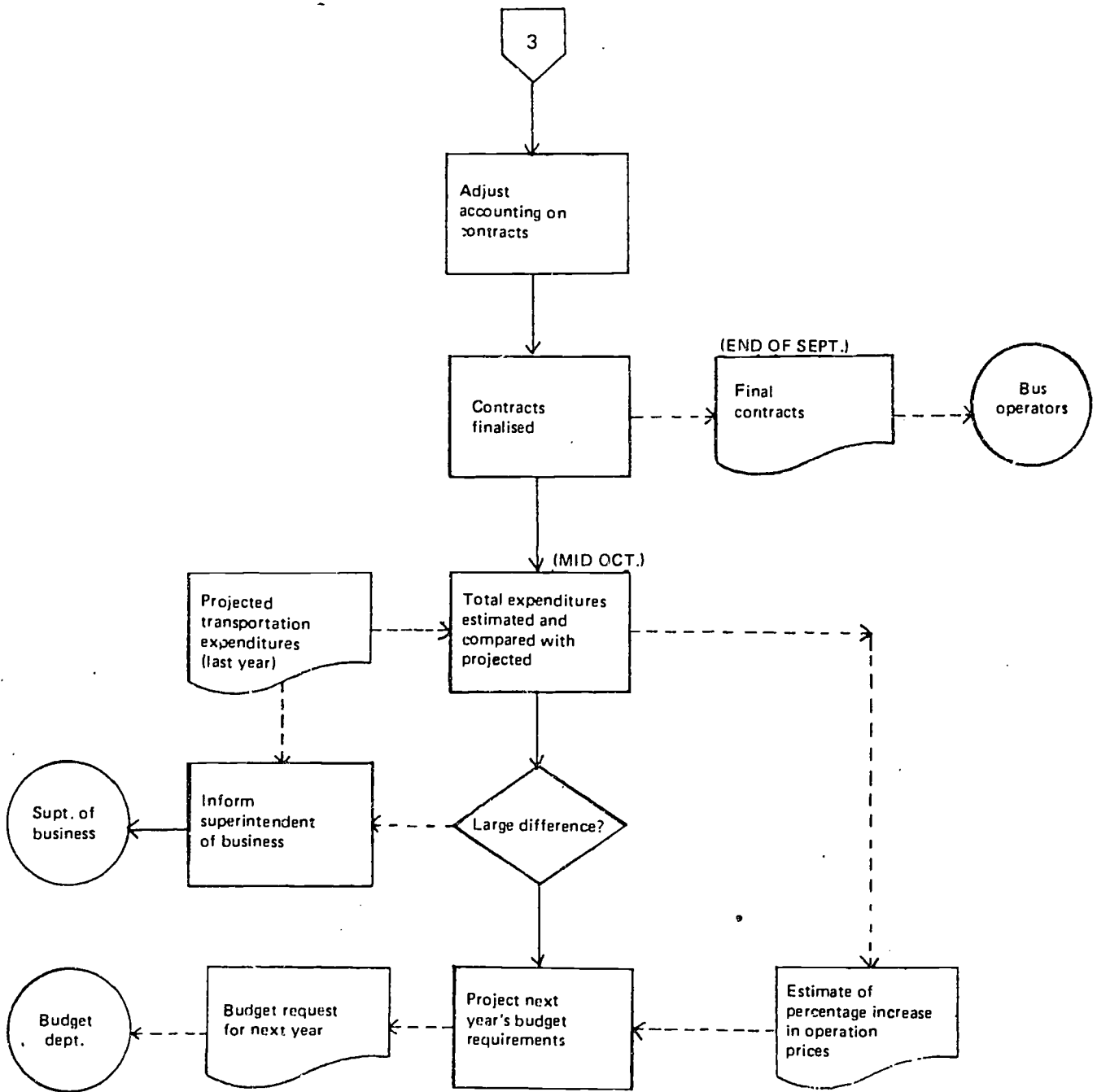
5.2.5 PLANT MAINTENANCE: Carry Out Work



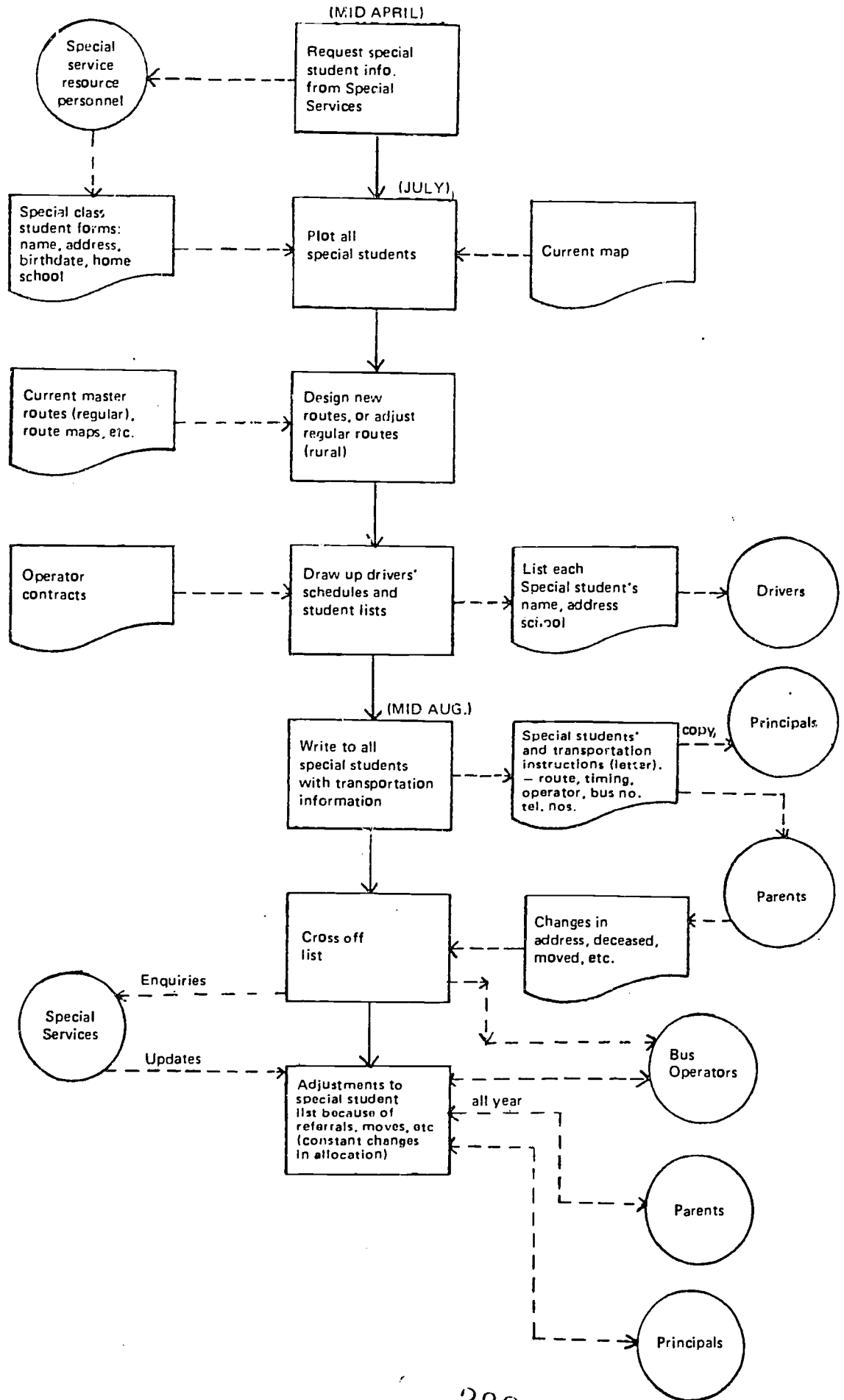
6.1.1, 6.1.2 & 6.1.3 TRANSPORTATION: Regular -- Route Design and Contract Negotiations



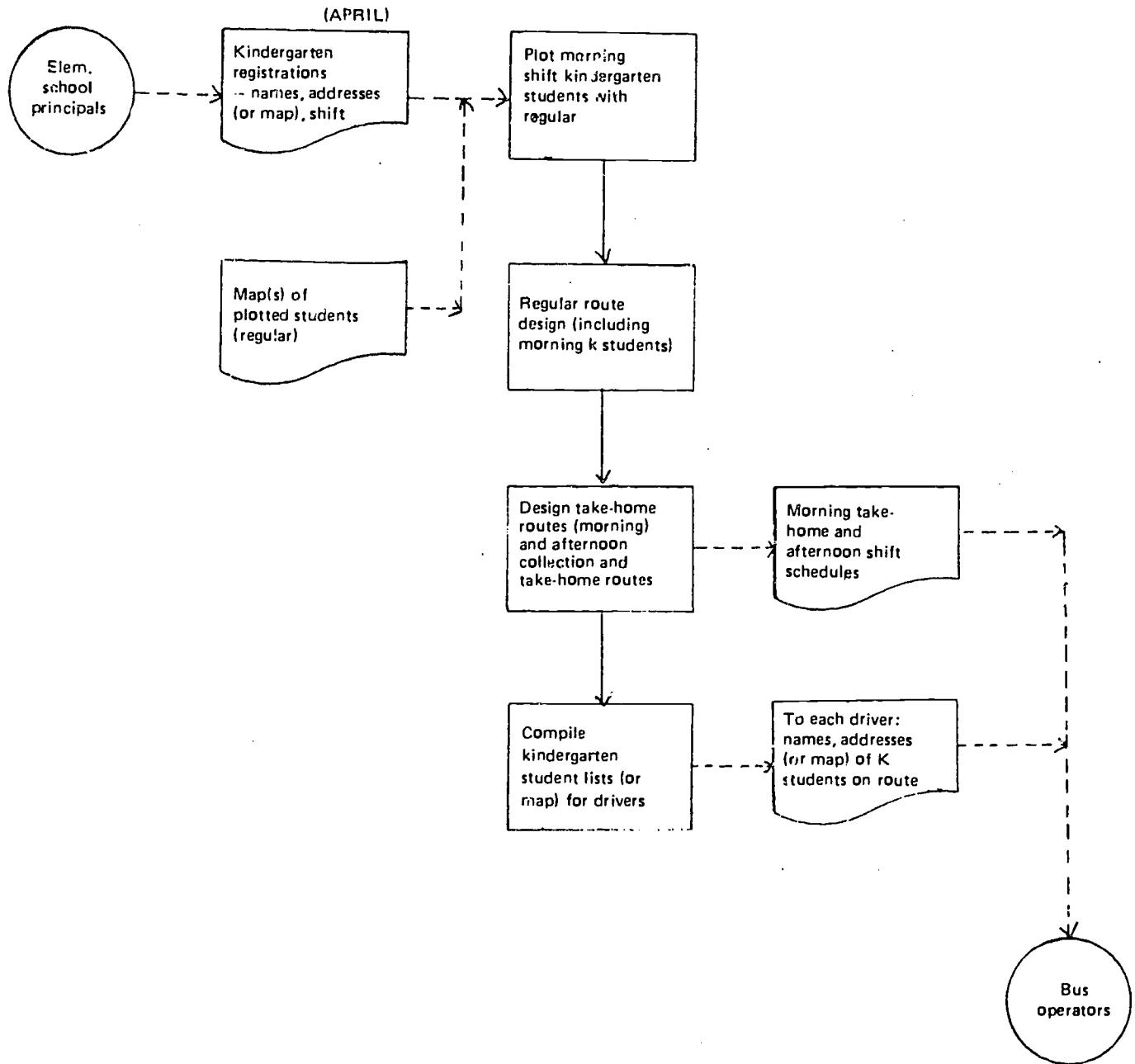




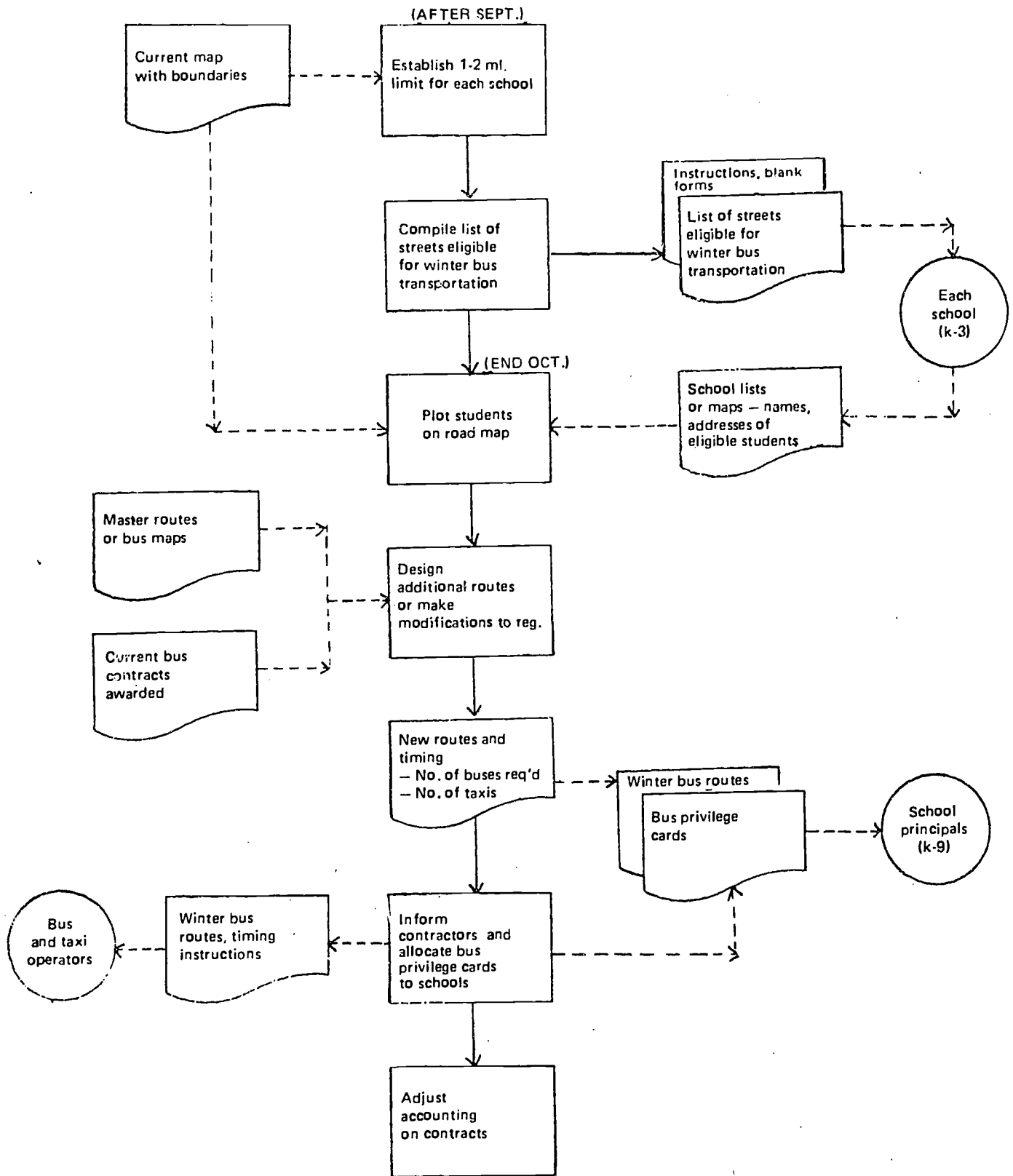
6.2 TRANSPORTATION: Special Students



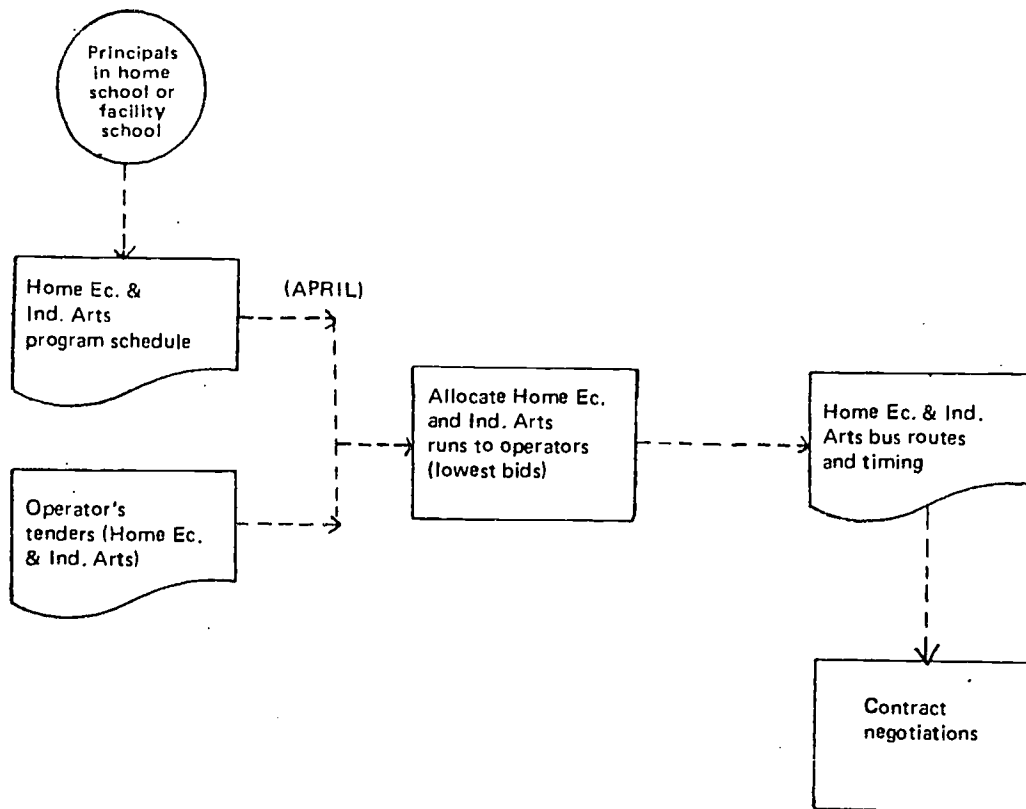
6.3 TRANSPORTATION: Kindergarten Busing



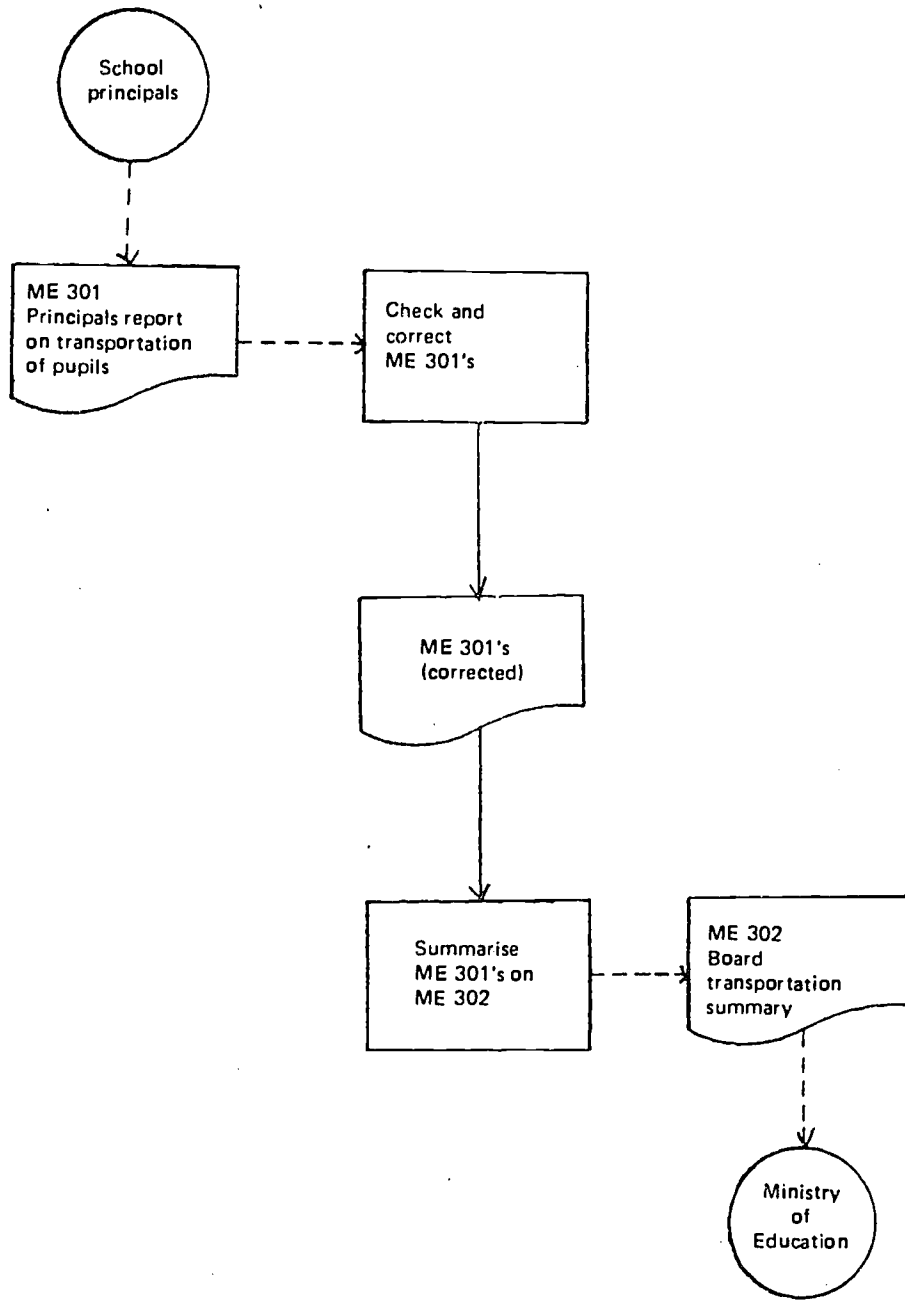
6.4 TRANSPORTATION: Winter Bus Scheduling



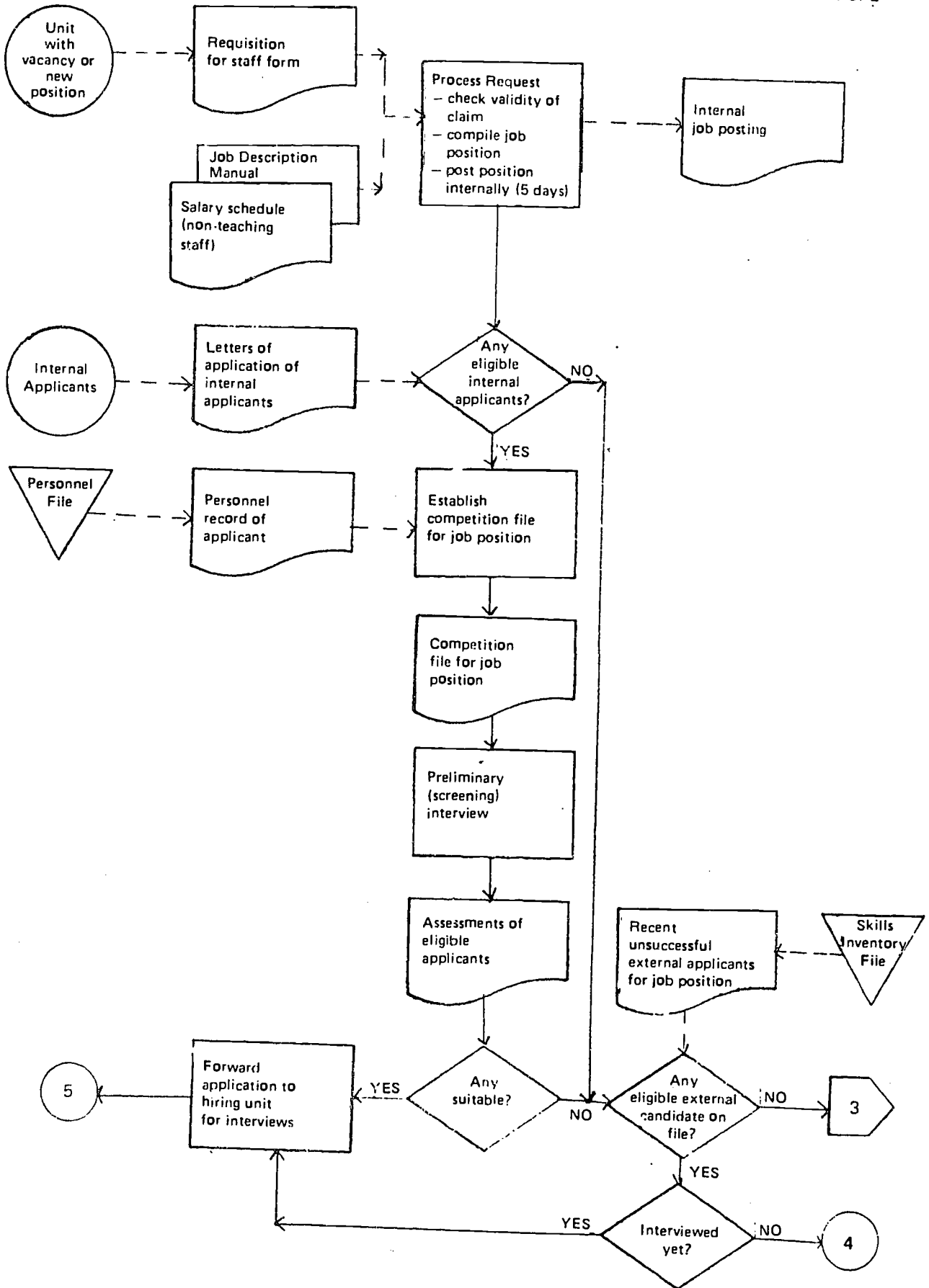
6.5 TRANSPORTATION: Home Economics and Industrial Arts

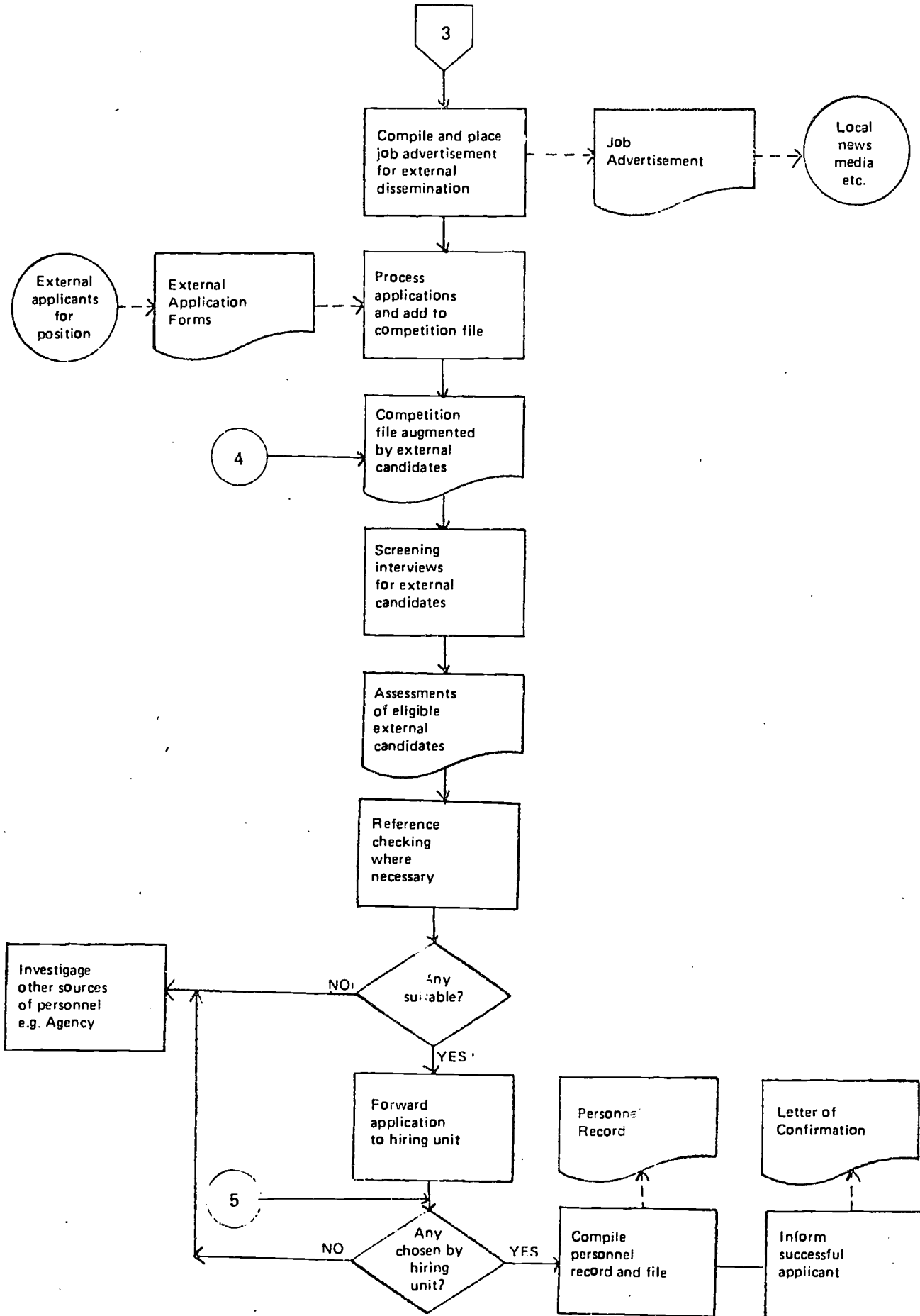


6.6 TRANSPORTATION: Ministry Reports

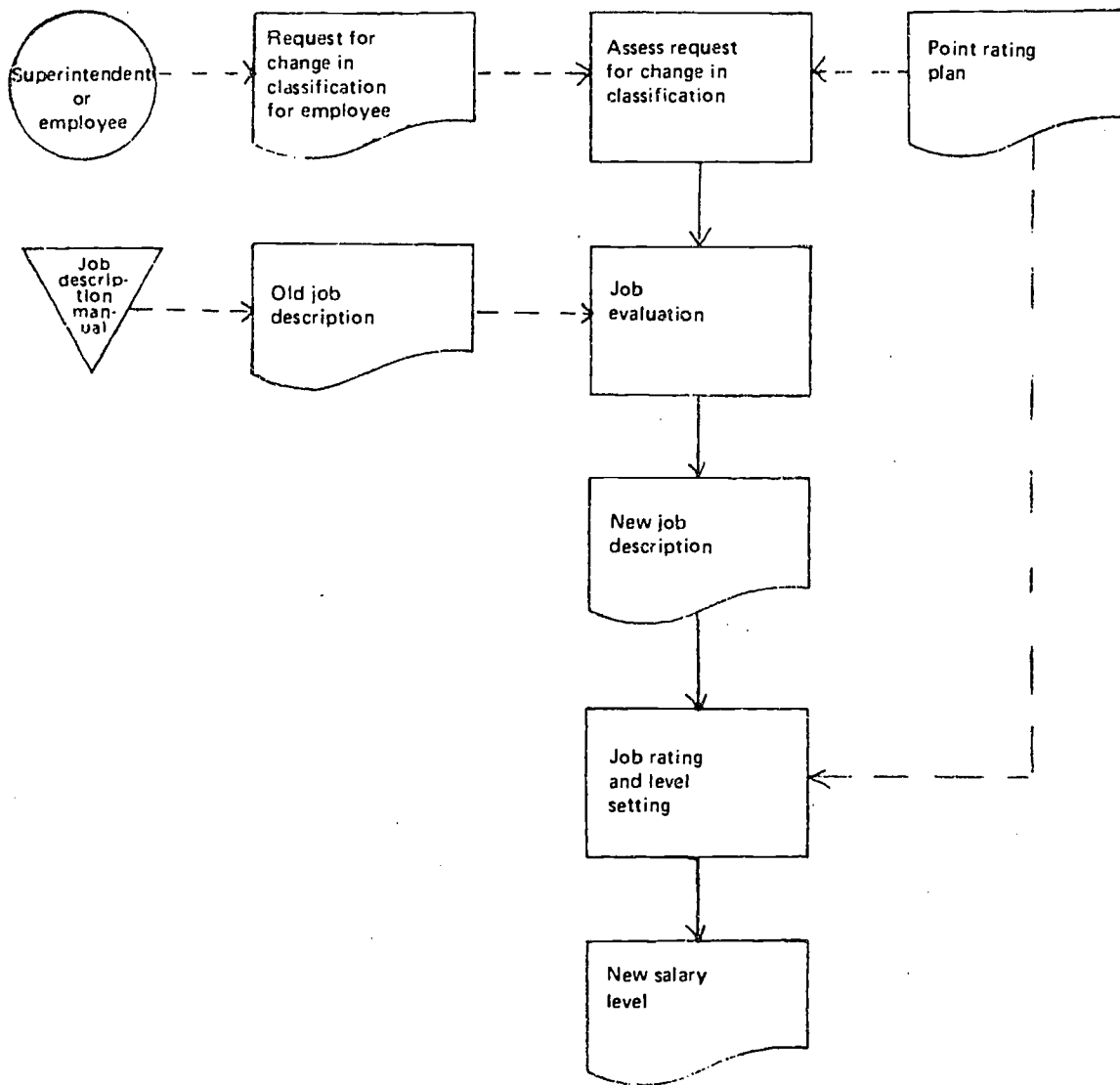


7.1.1 PERSONNEL ADMINISTRATION: Non-Teaching Staff Recruitment

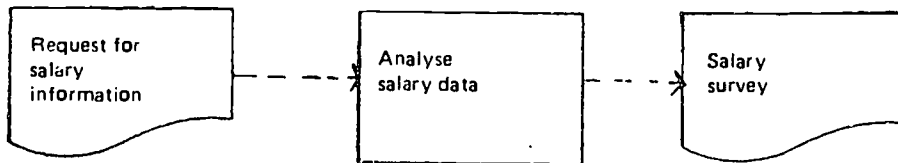




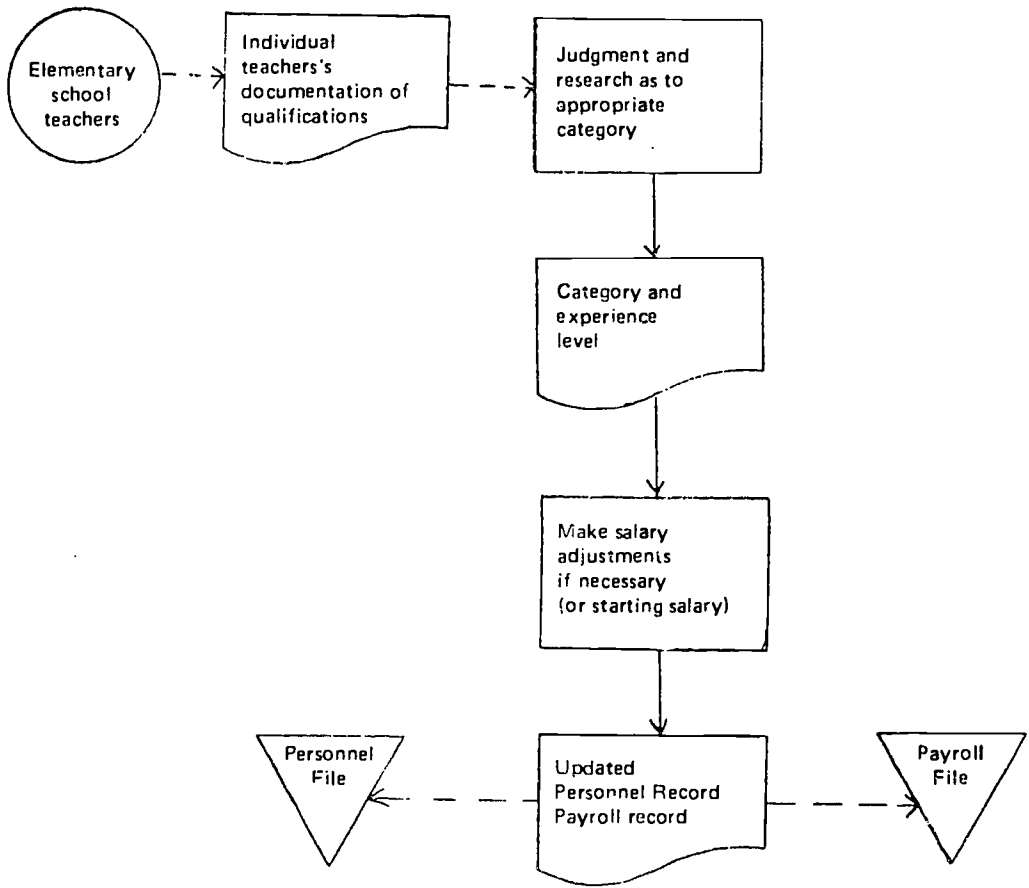
7.1.2.1 PERSONNEL ADMINISTRATION: Salary Administration – Job Evaluation



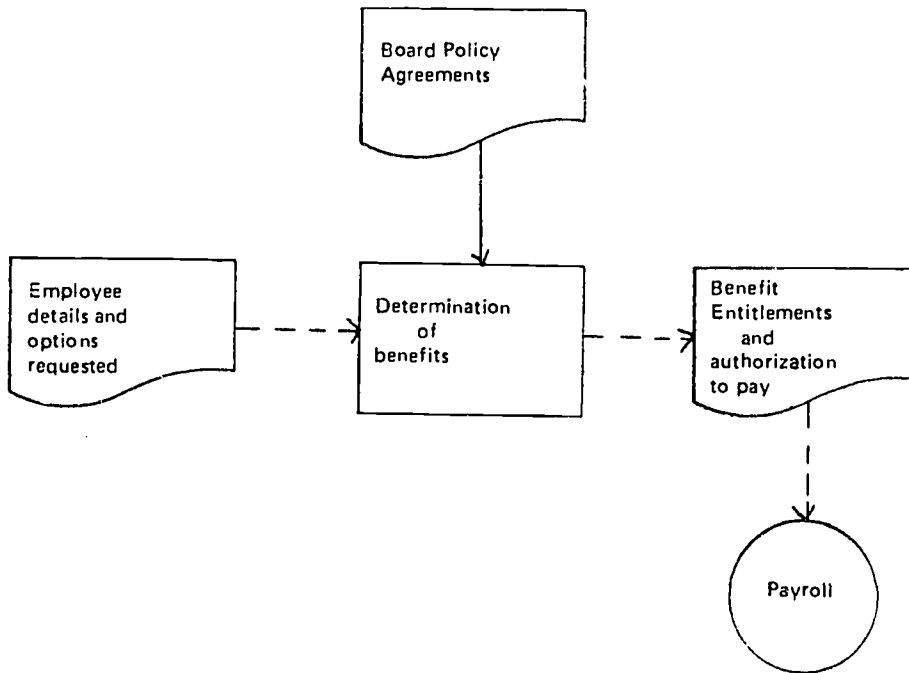
7.1.2.2 PERSONNEL ADMINISTRATION: Salary Administration – Salary Surveys



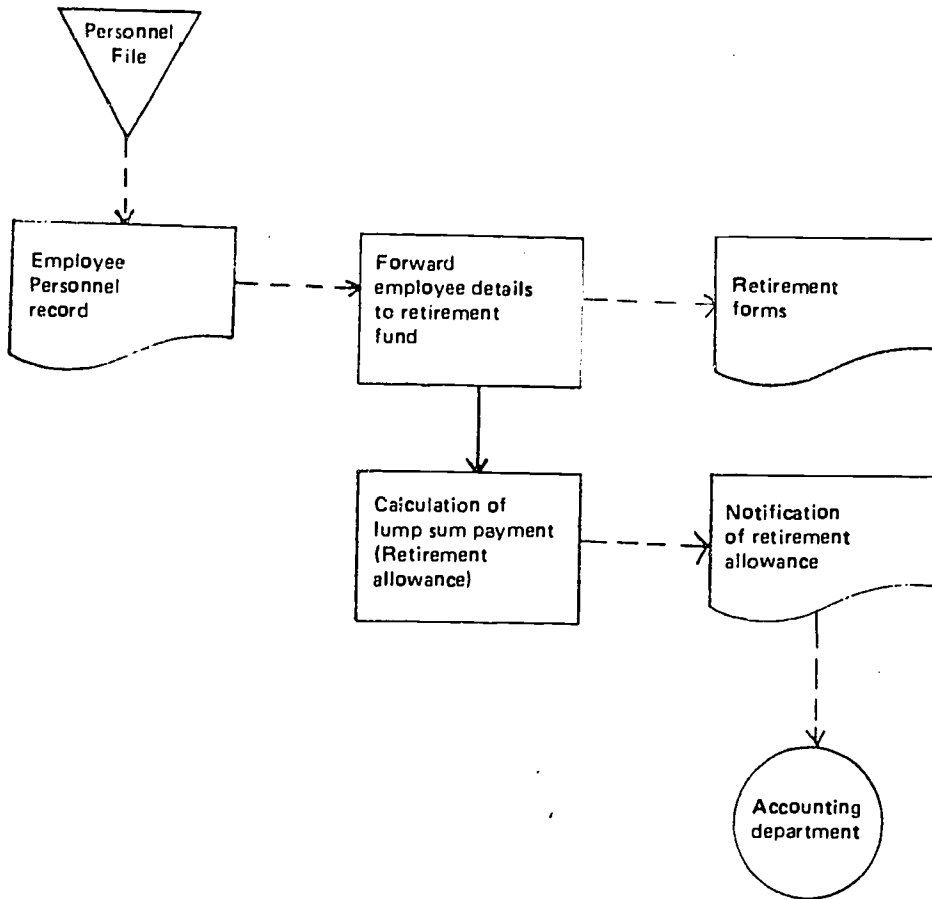
7.1.2.3 PERSONNEL ADMINISTRATION: Salary Administration – Interpretation of Salary Schedules



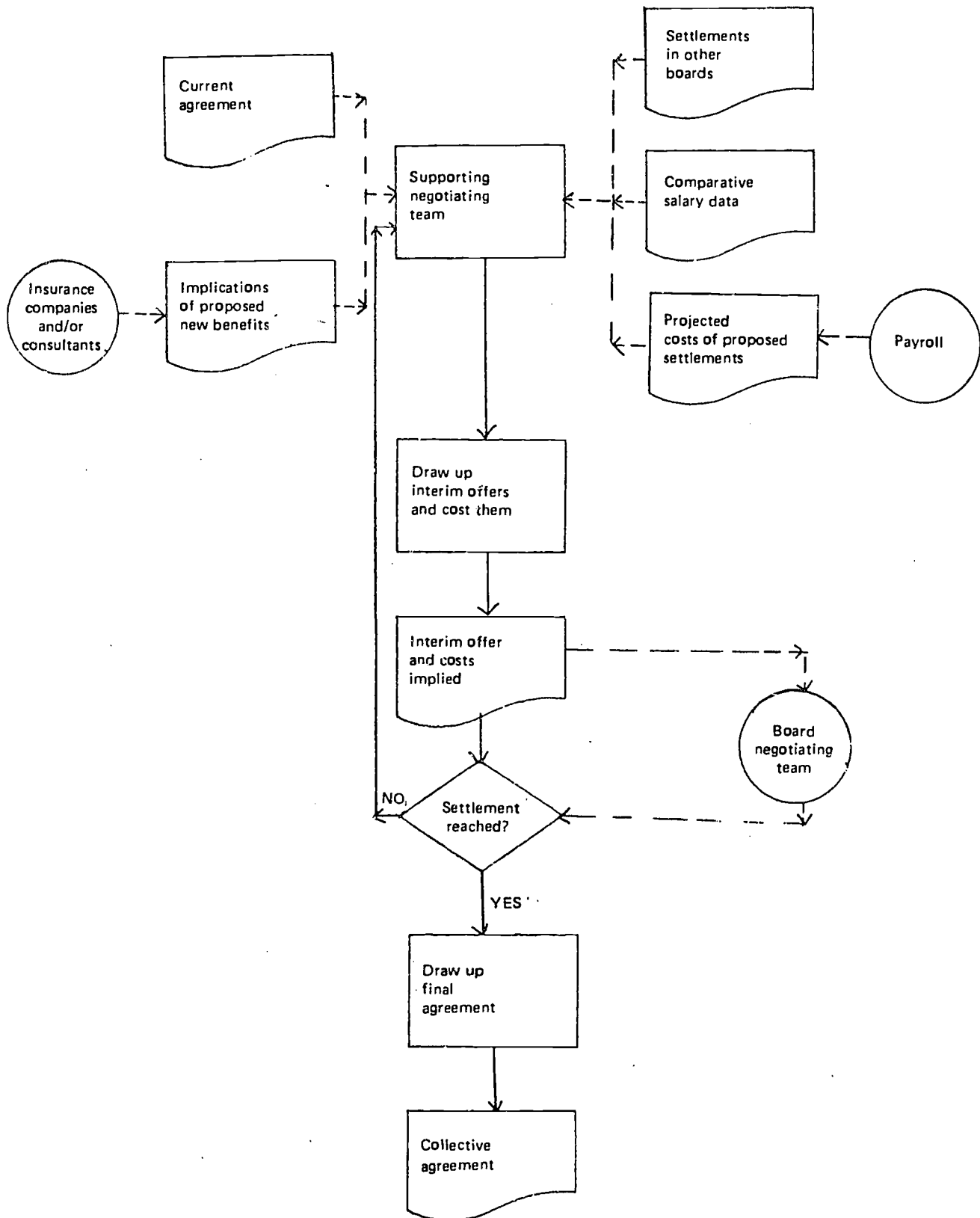
7.1.3.1 PERSONNEL DEPARTMENT: Employee Benefits -- New Employees



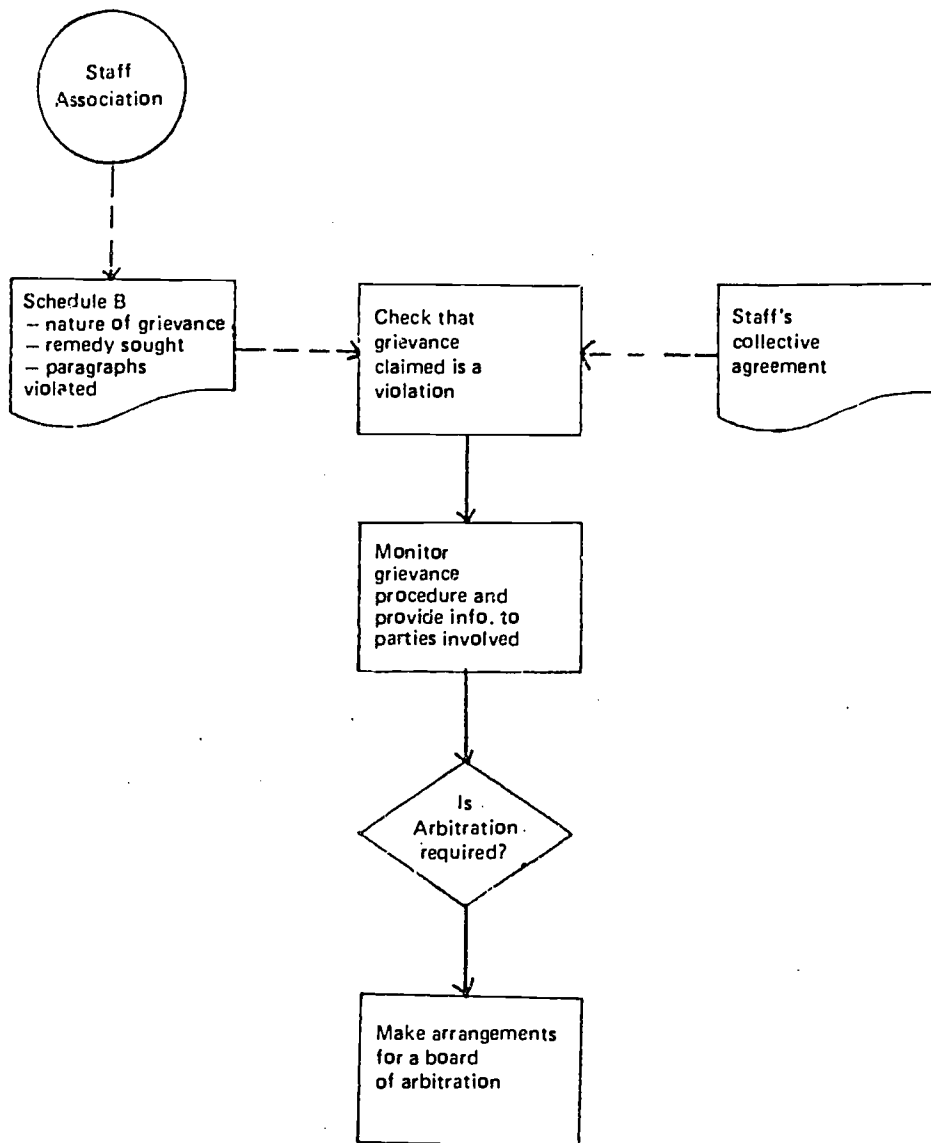
7.1.3.3 PERSONNEL ADMINISTRATION: Employee Benefits – Terminating/Retiring Employee



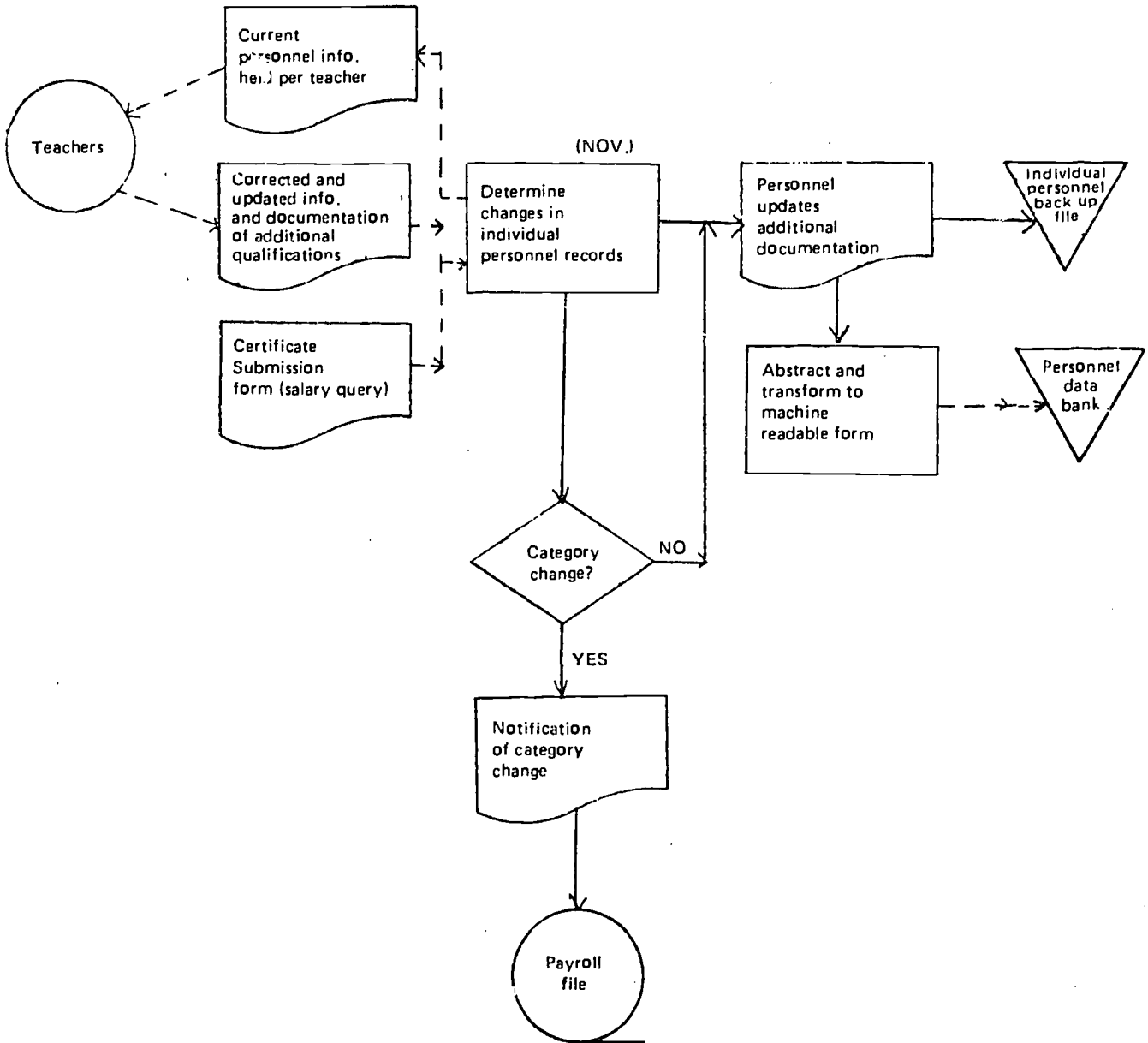
7.1.4 PERSONNEL ADMINISTRATION: Negotiations

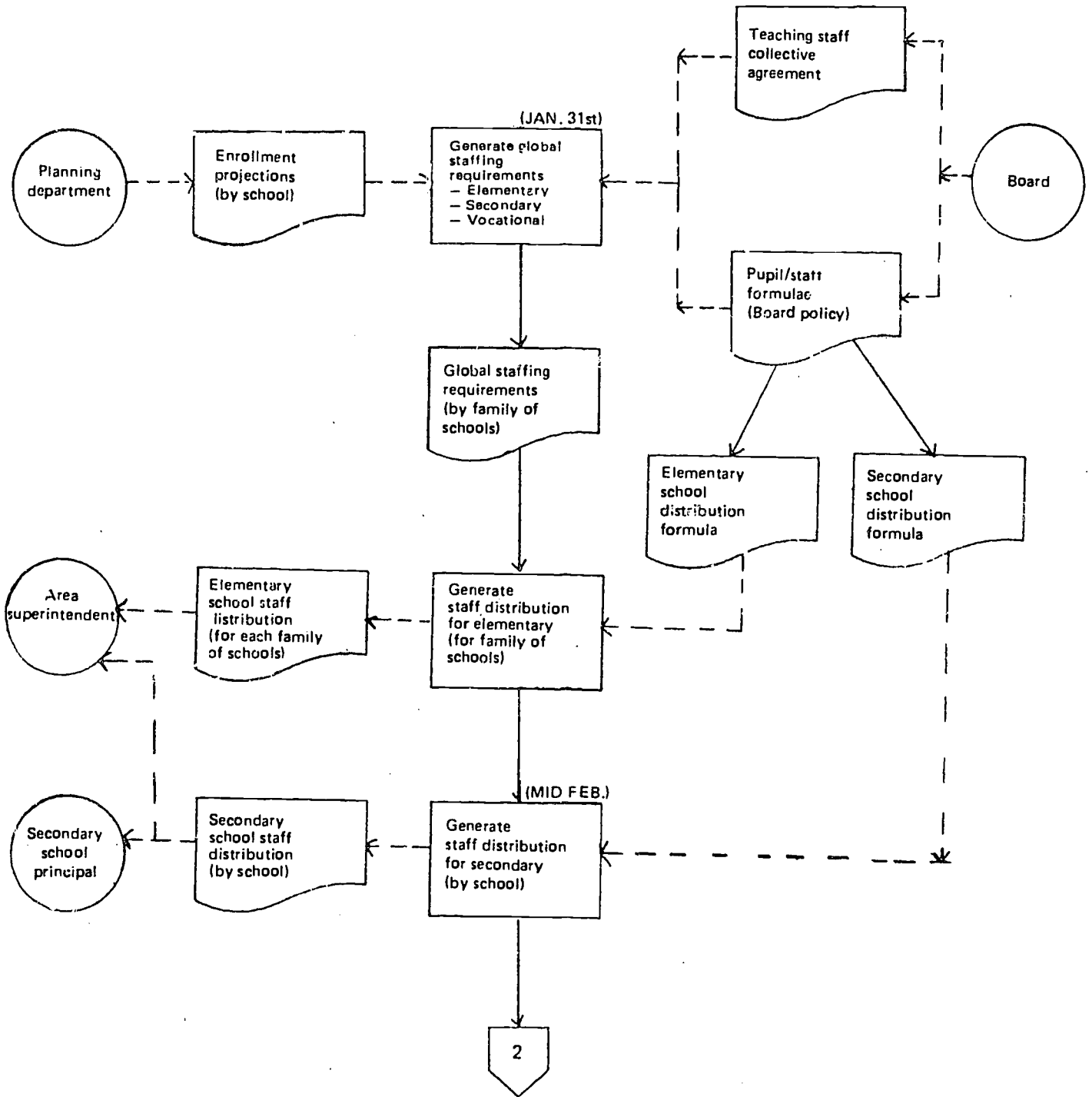


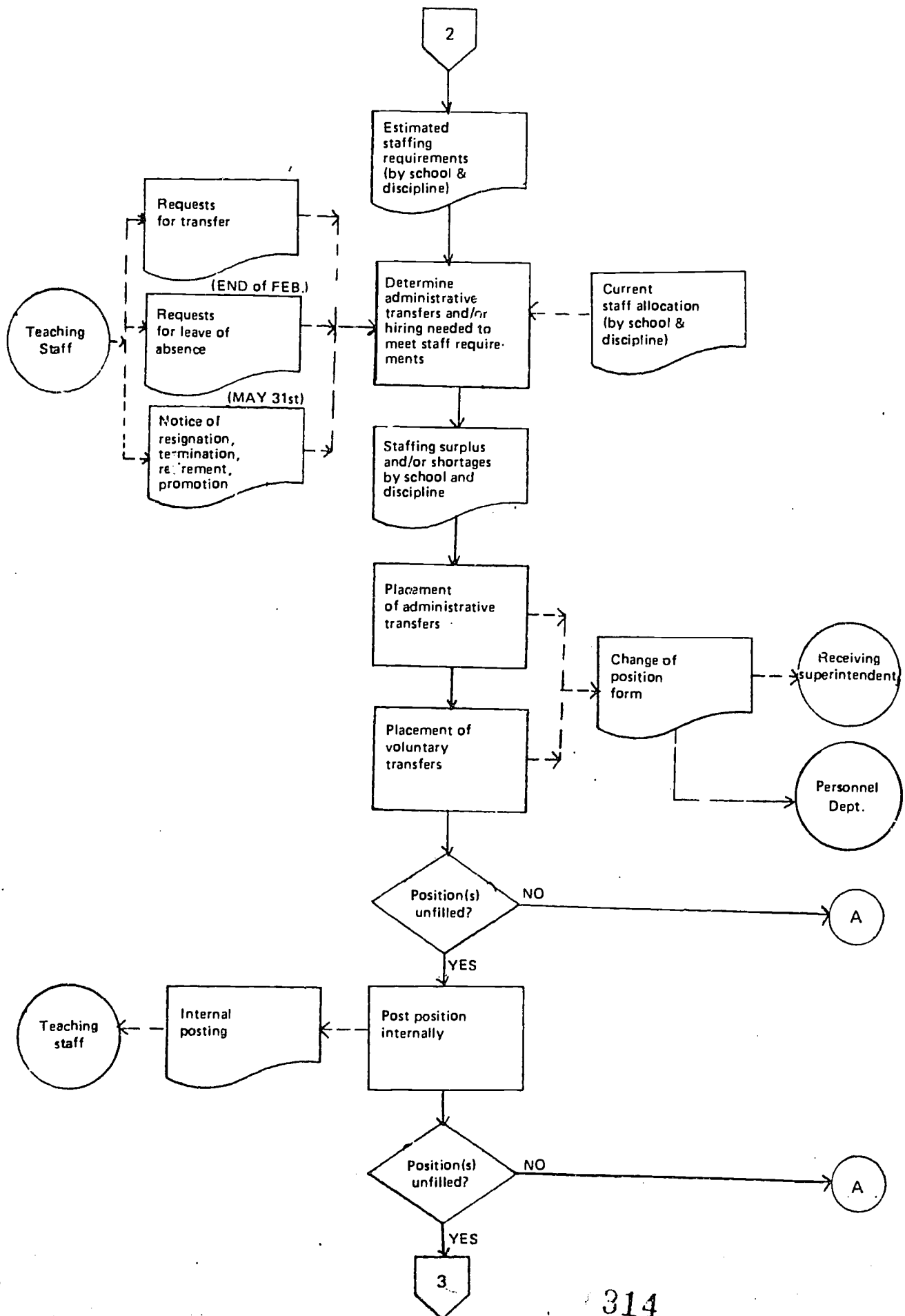
7.1.5 PERSONNEL ADMINISTRATION: Collective Agreement Violations

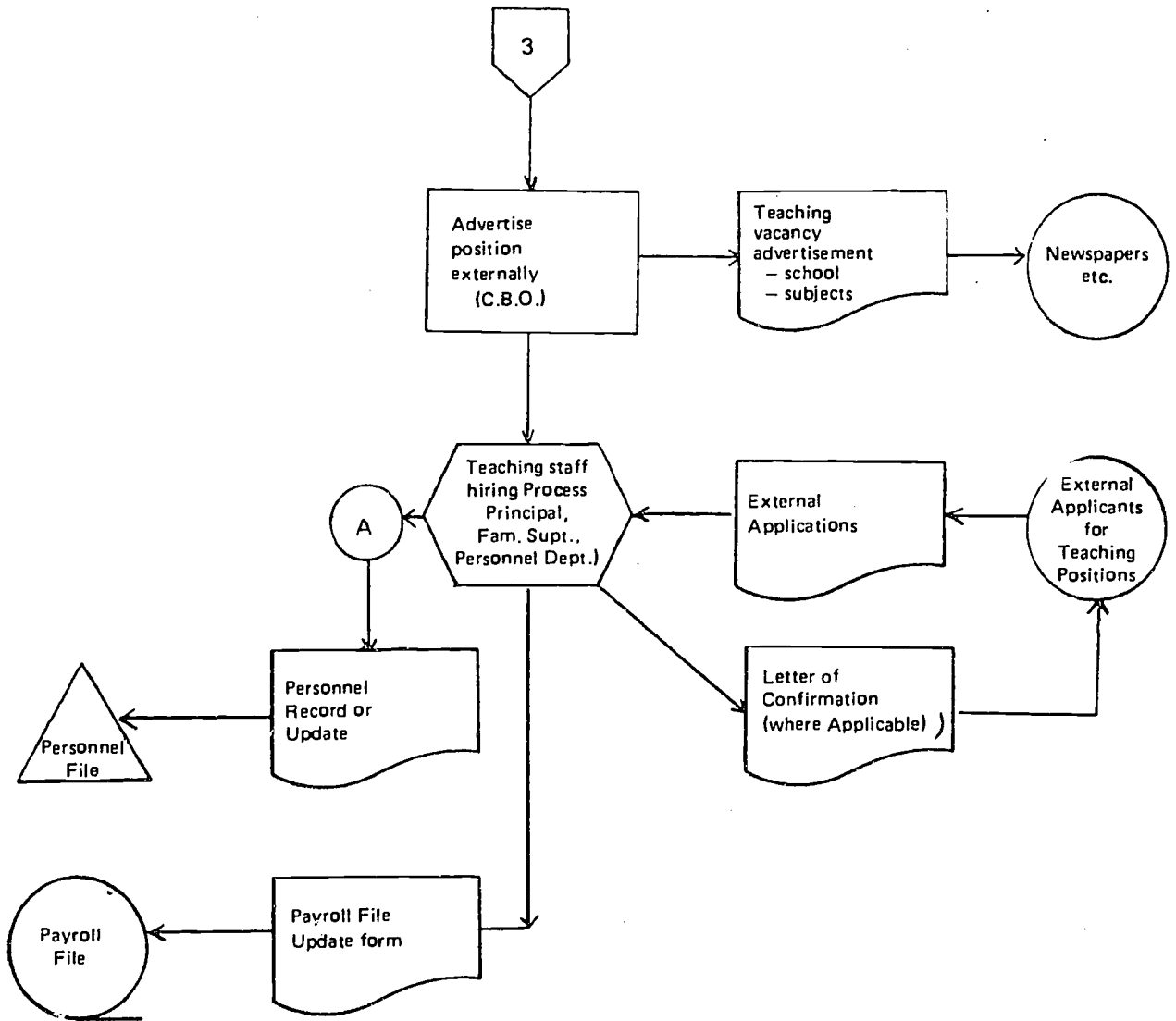


7.1.8 PERSONNEL ADMINISTRATION: Personnel Records



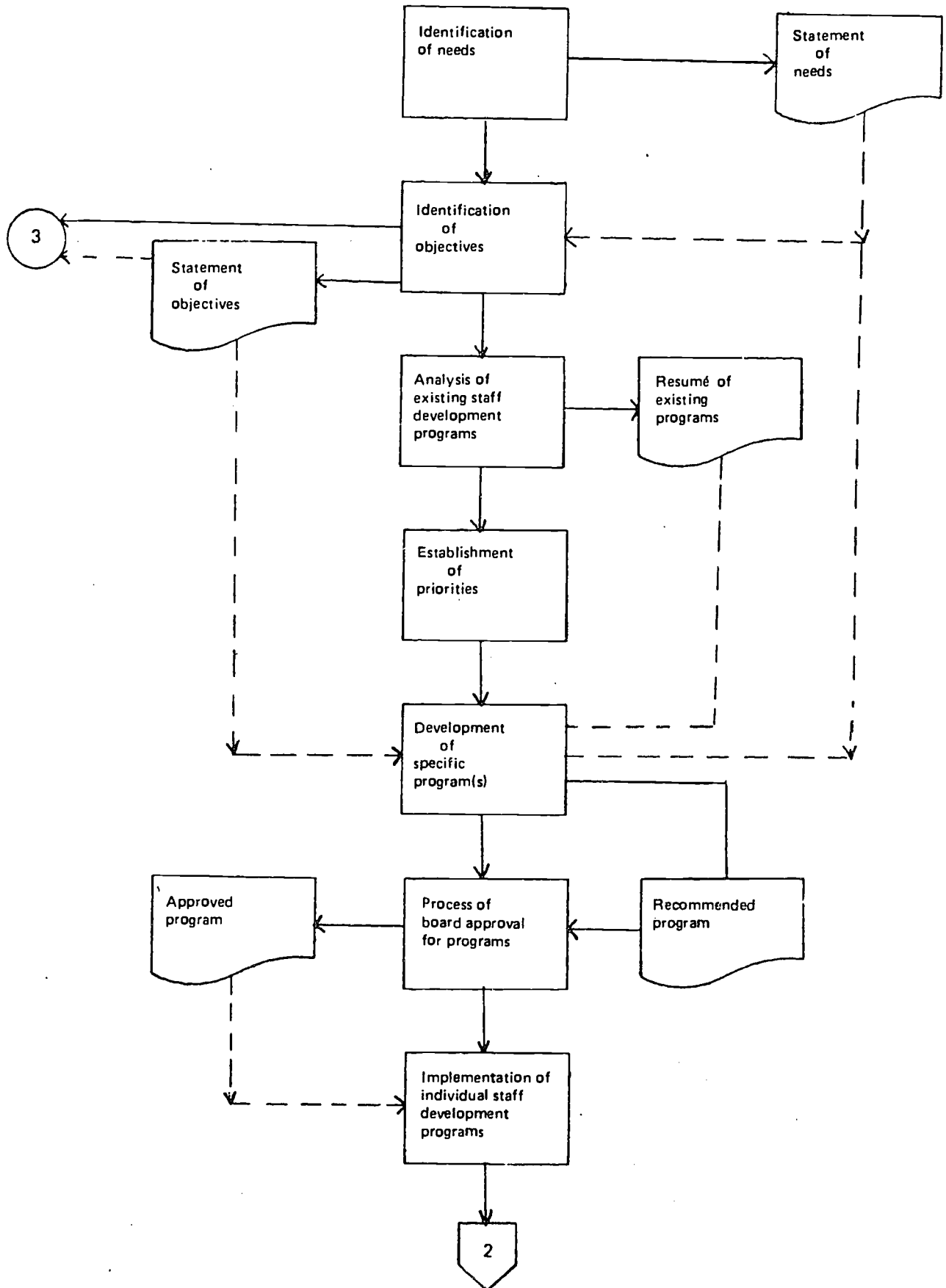


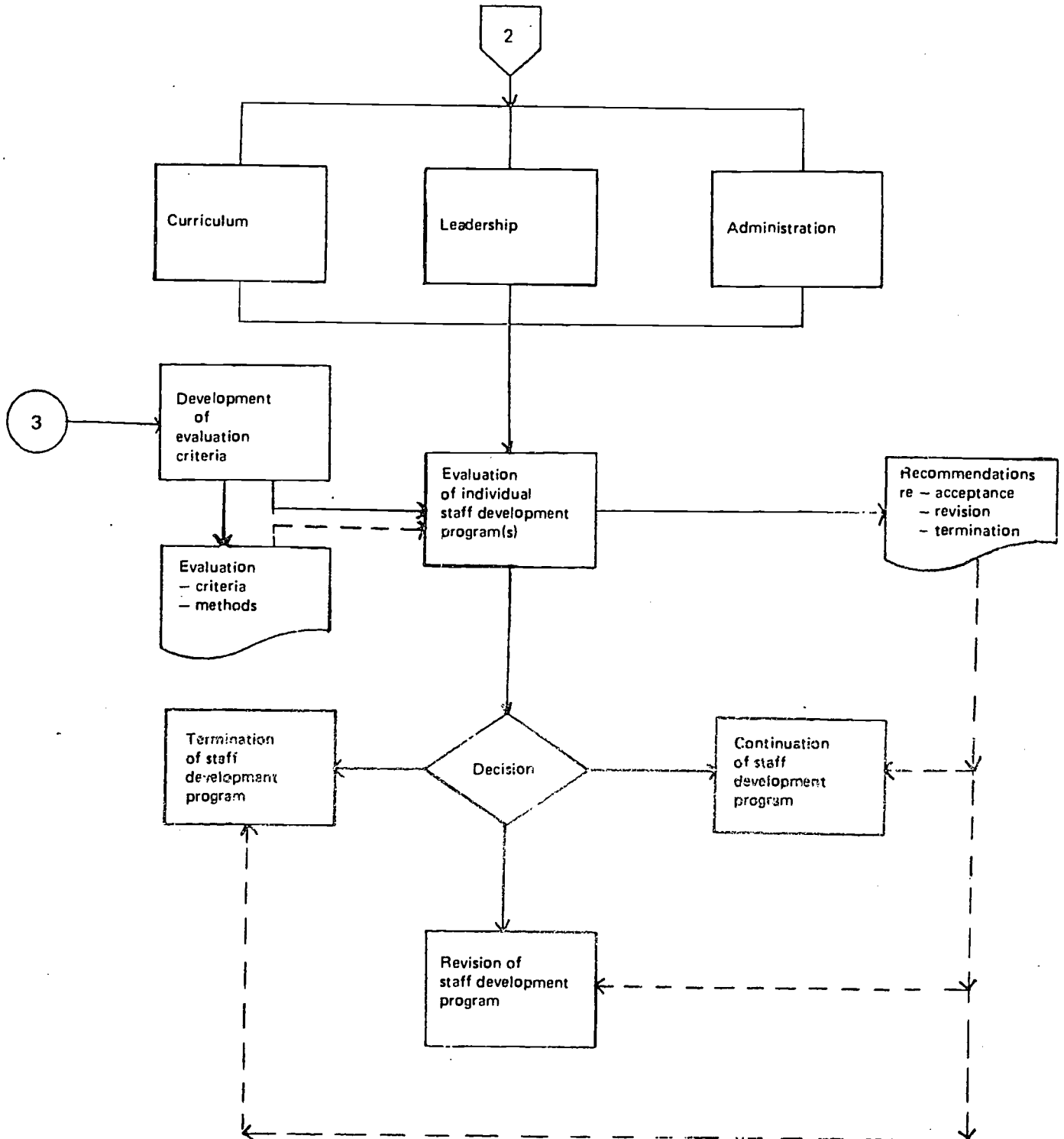




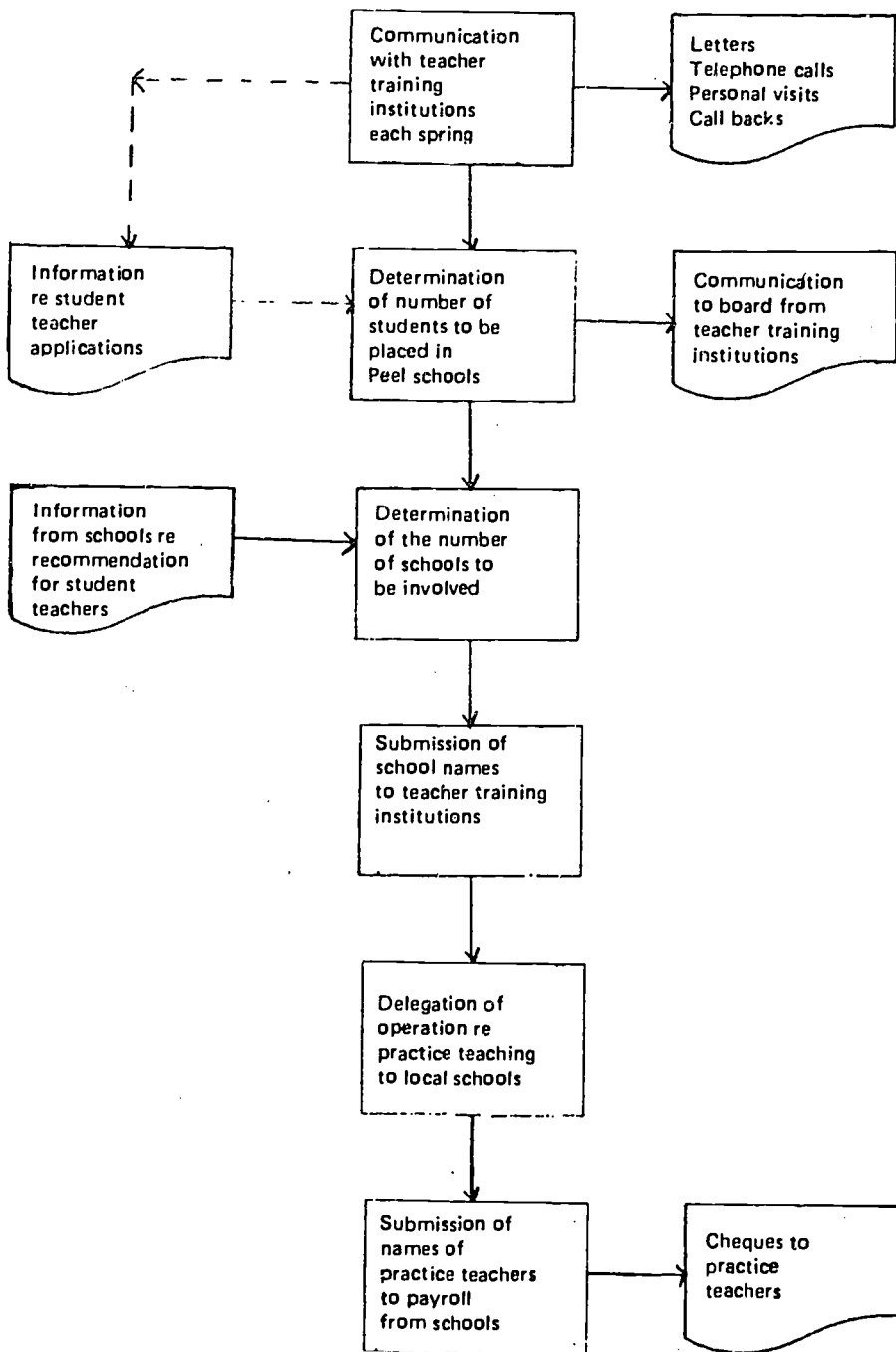
8.1 STAFF DEVELOPMENT AND RELATIONS – Staff Development

1 of 2

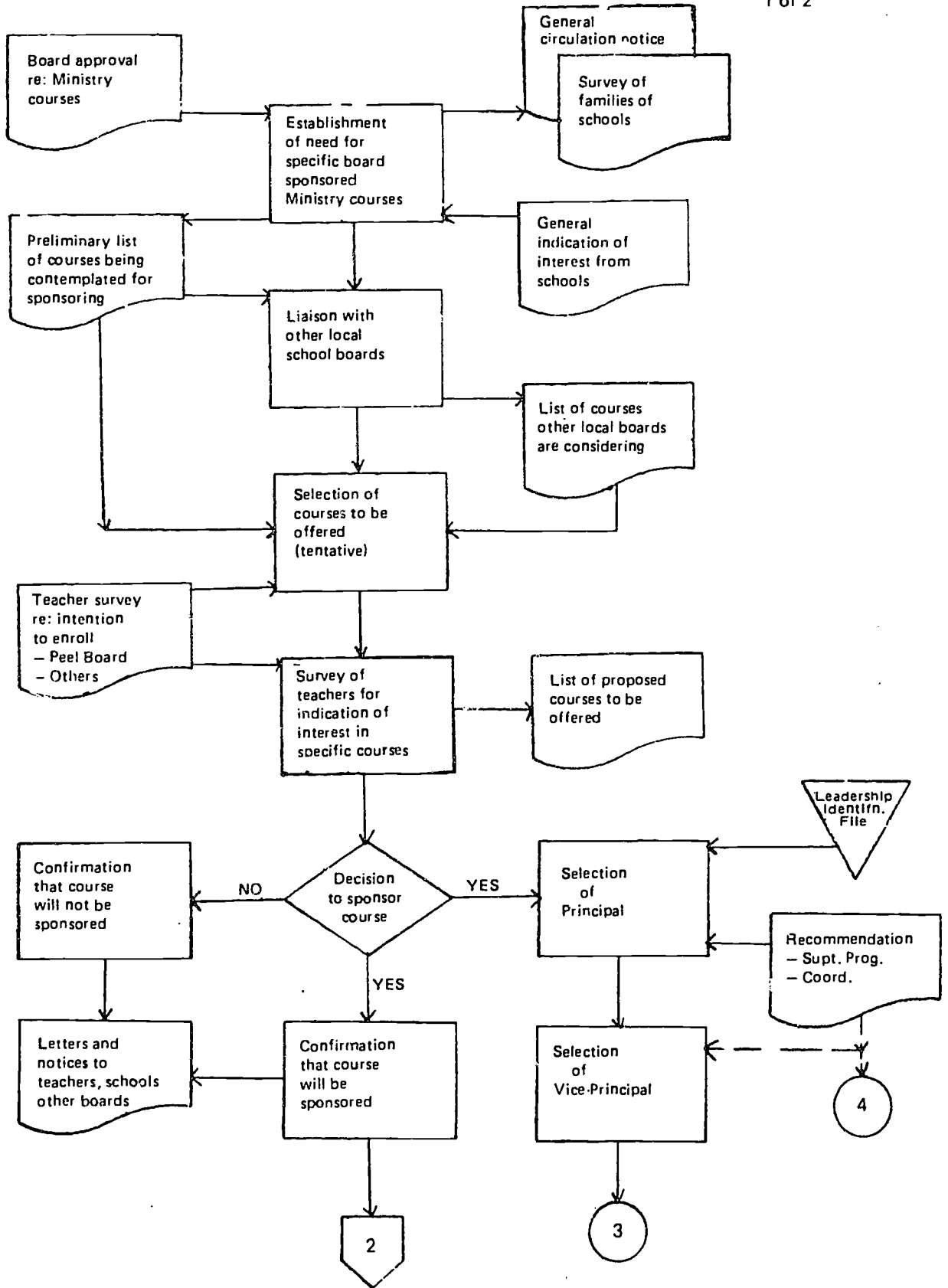


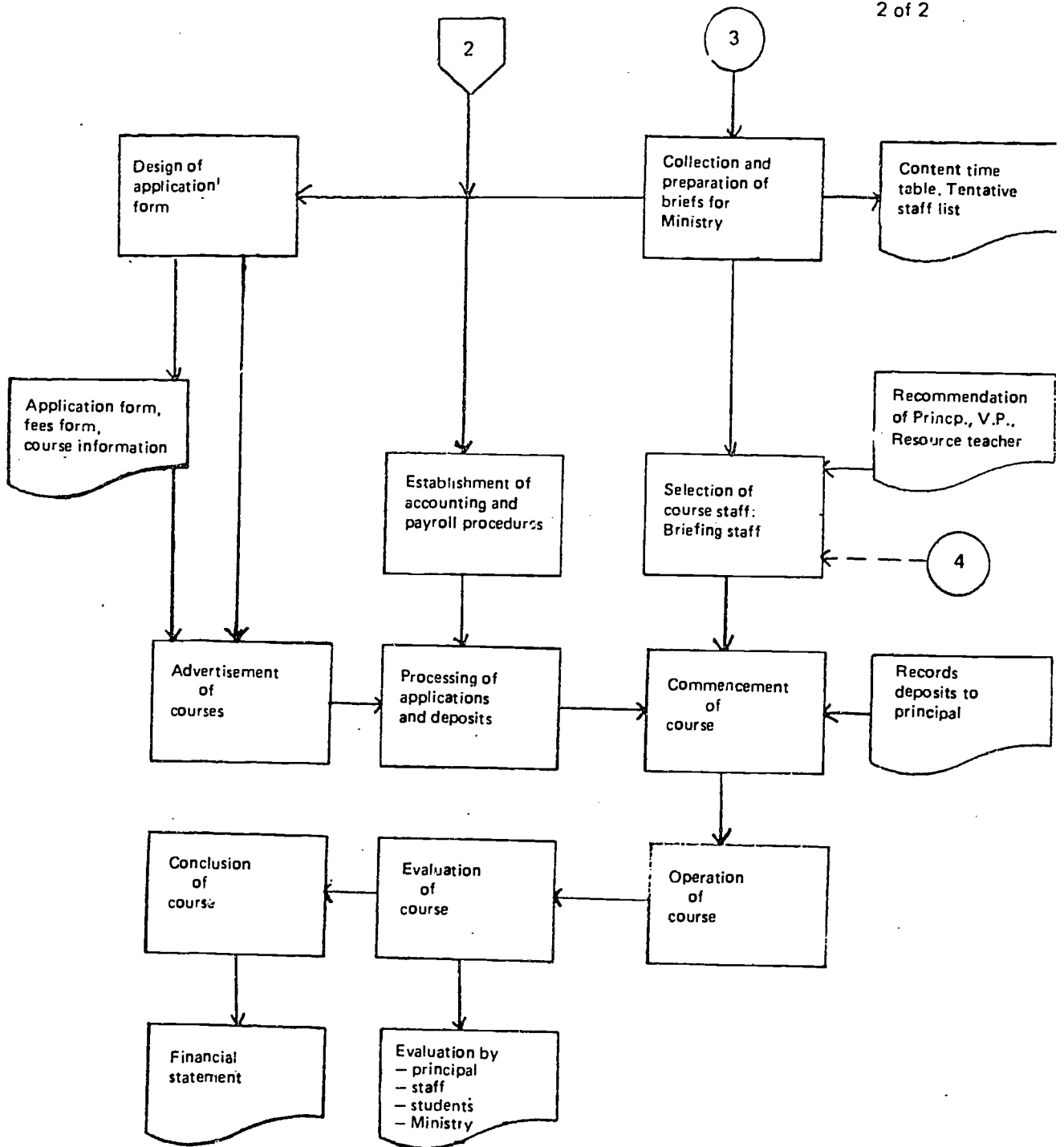


8.1.1 STAFF DEVELOPMENT AND RELATIONS: DEVELOPMENT – Liaison with Teacher Training Institutions

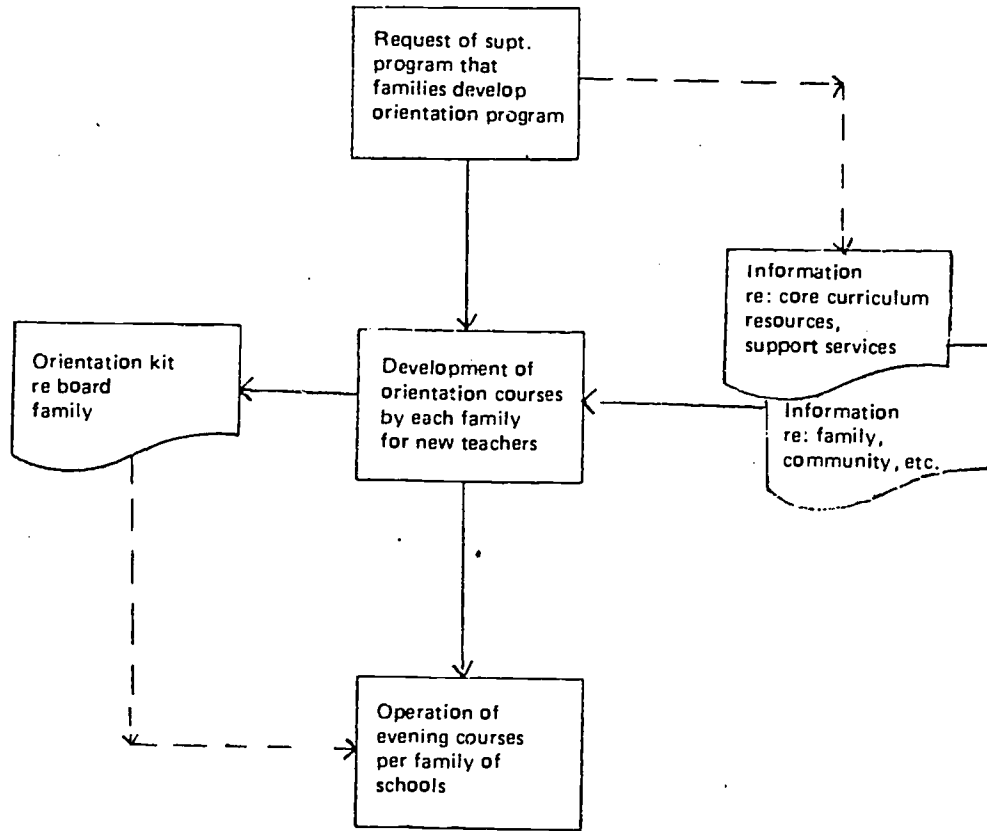


8.1.2 STAFF DEVELOPMENT: Board Sponsored Ministry Courses

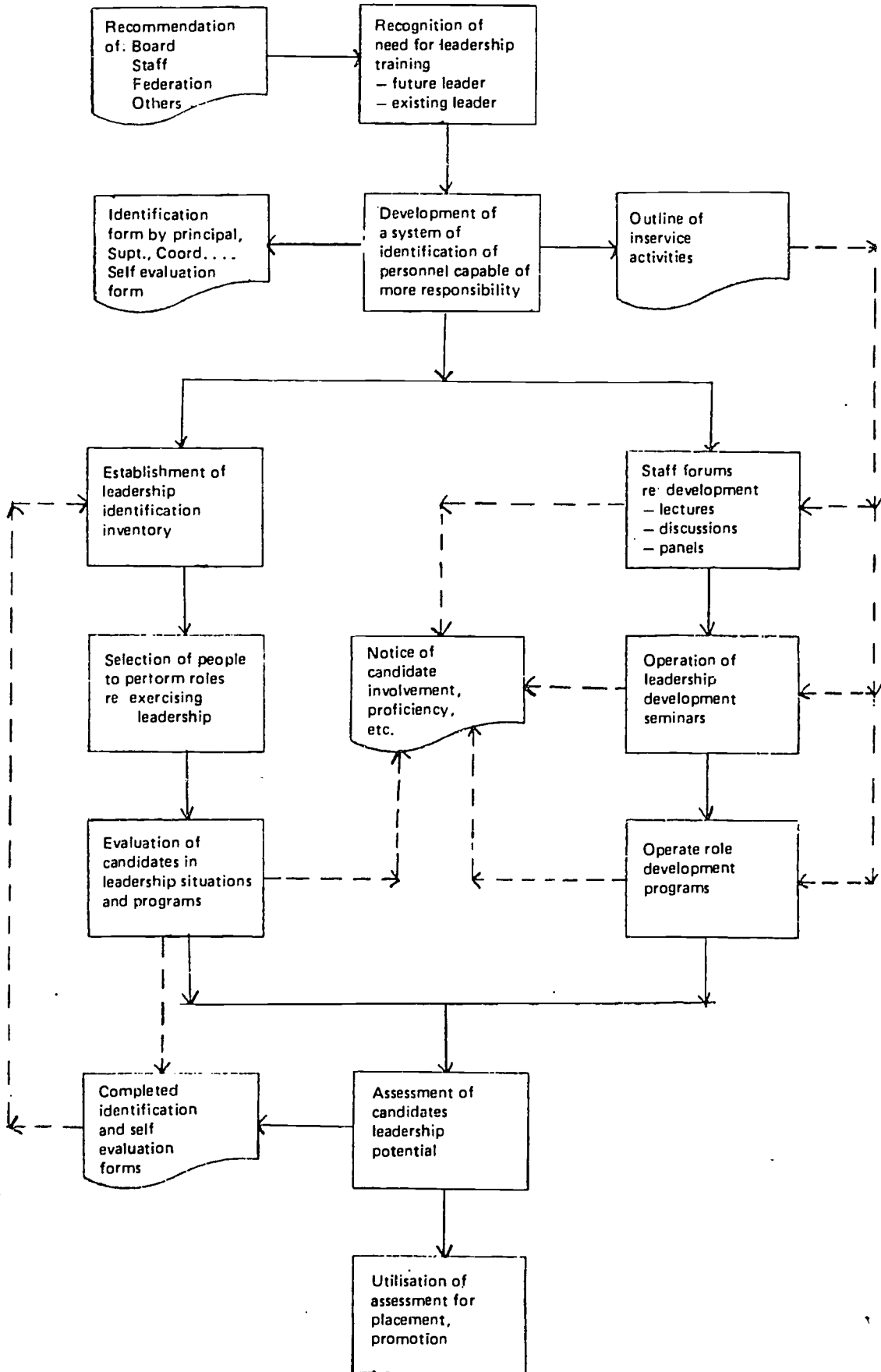




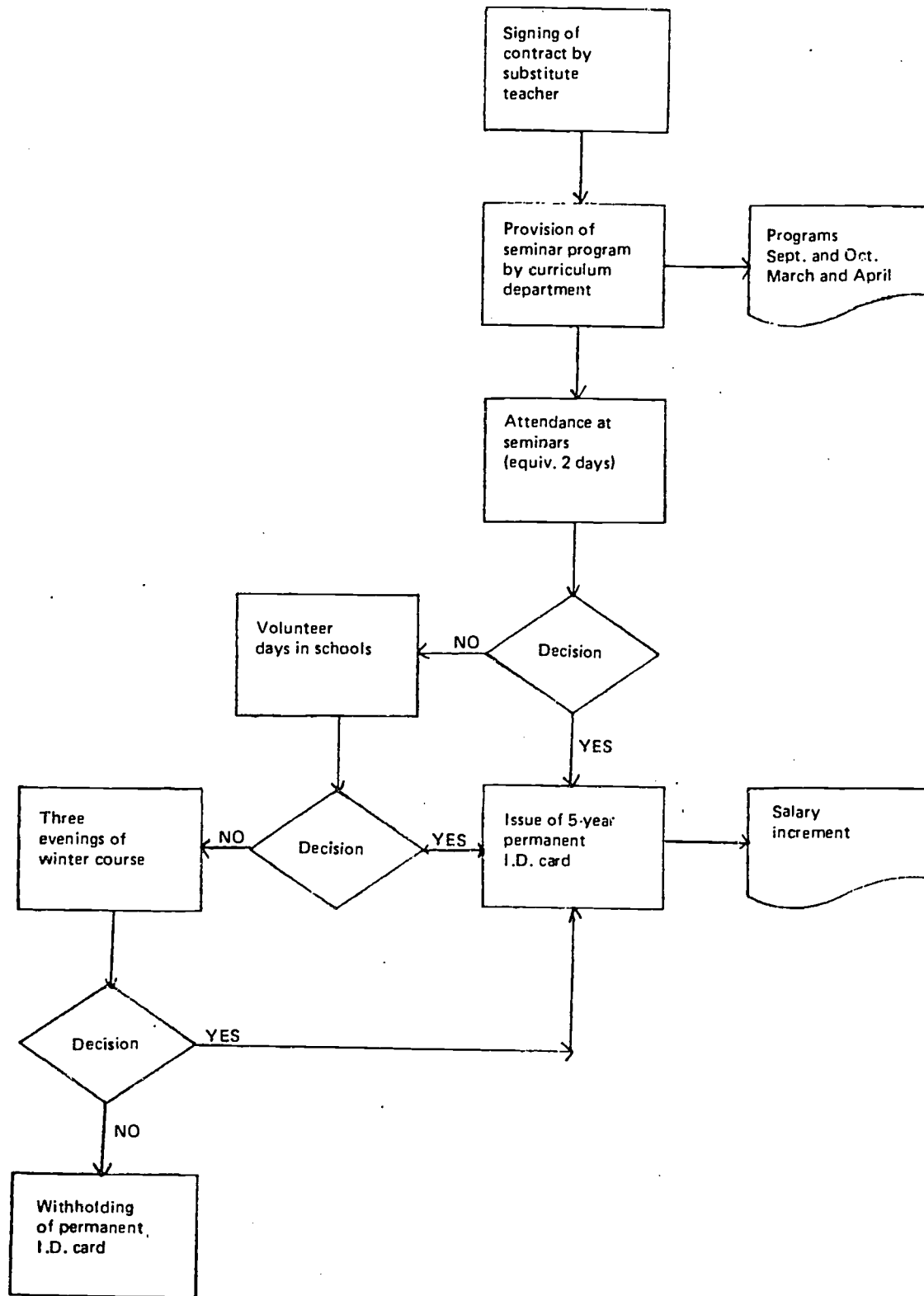
8.1.3.1 STAFF DEVELOPMENT: Credit and Non Credit Courses – New Teachers



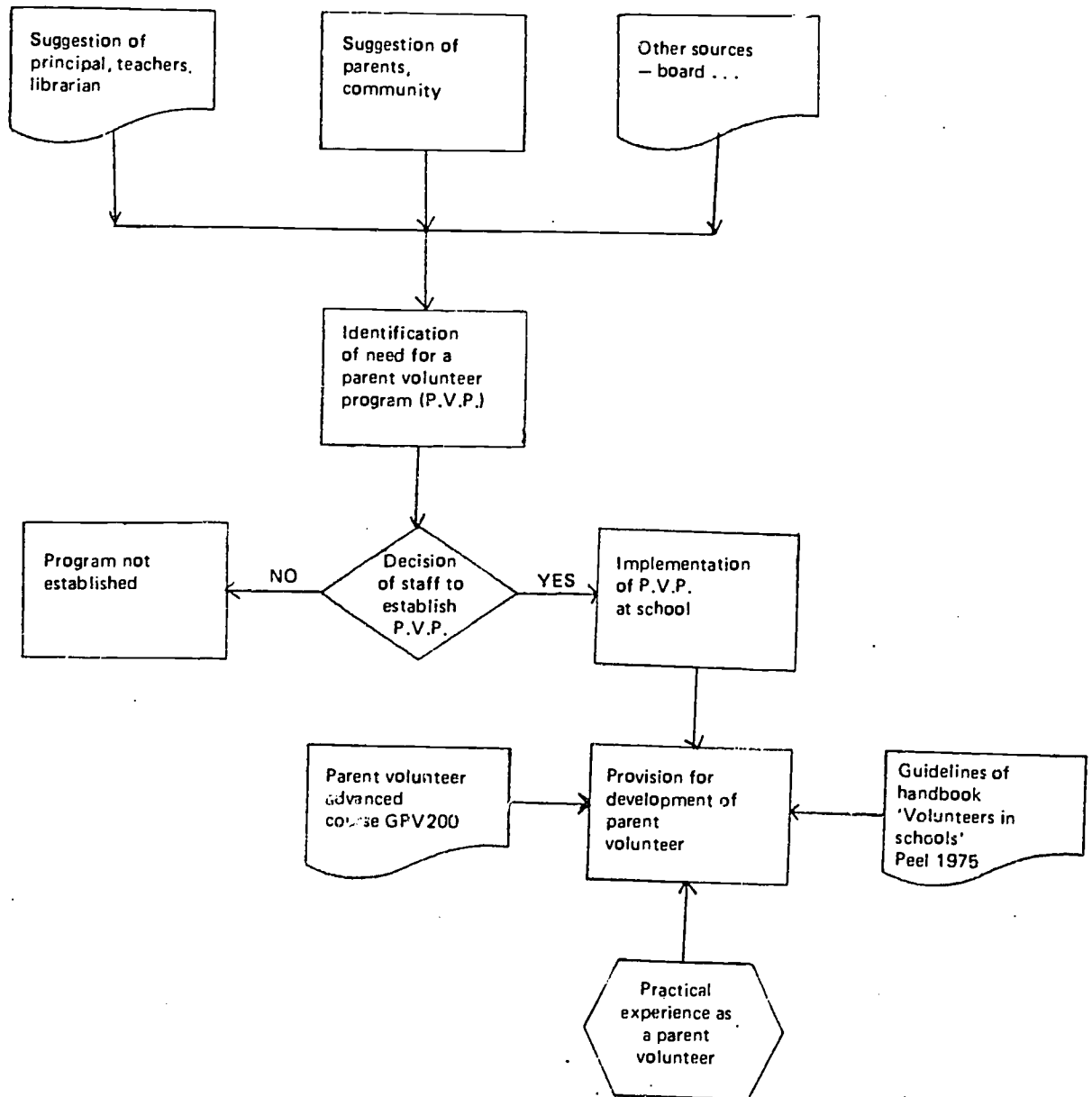
8.1.3.3 STAFF DEVELOPMENT: Credit and Non-credit Courses – Leadership Development



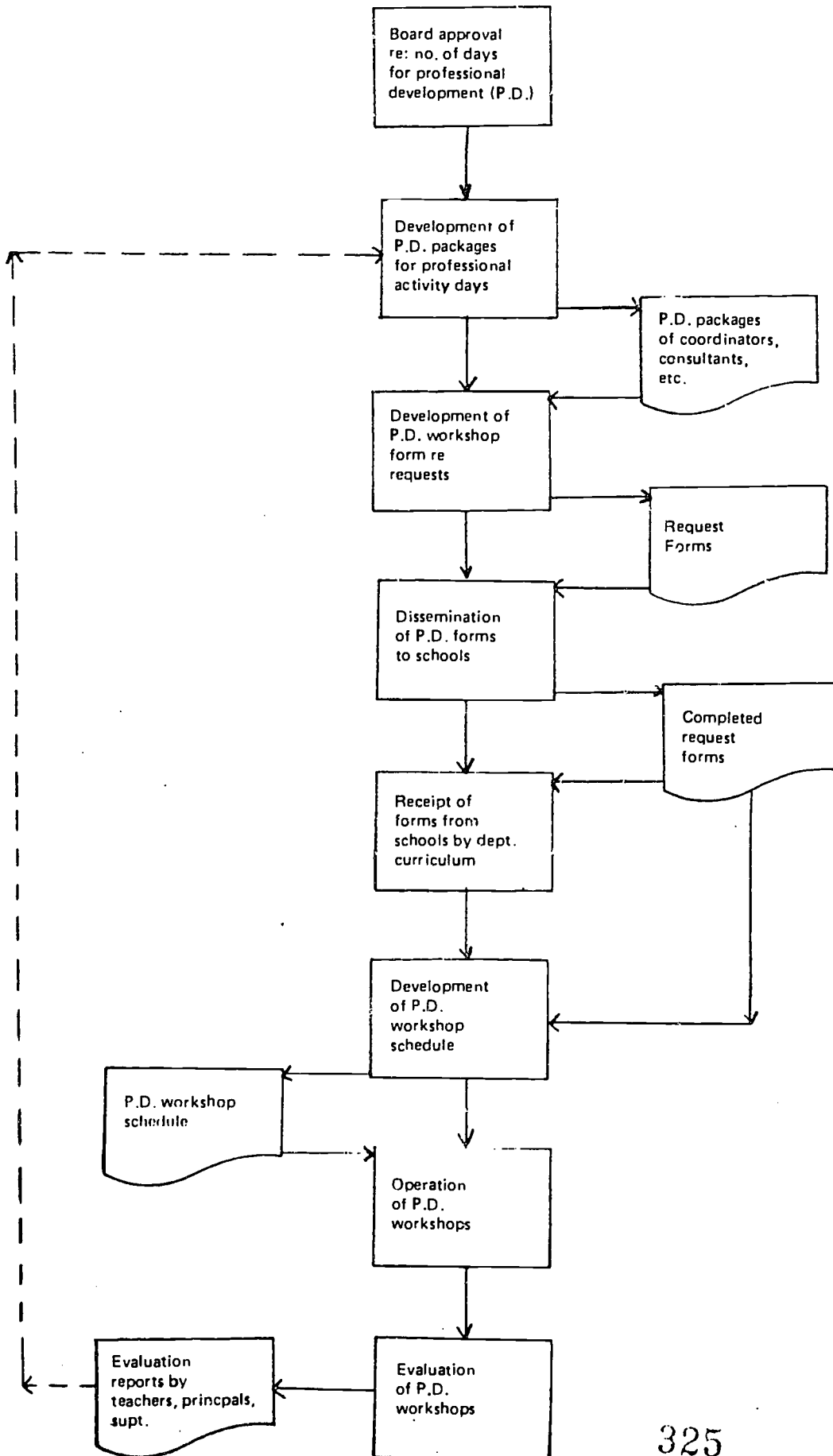
8.1.3.4 STAFF DEVELOPMENT: Credit and Non-credit Courses – Substitute Teachers



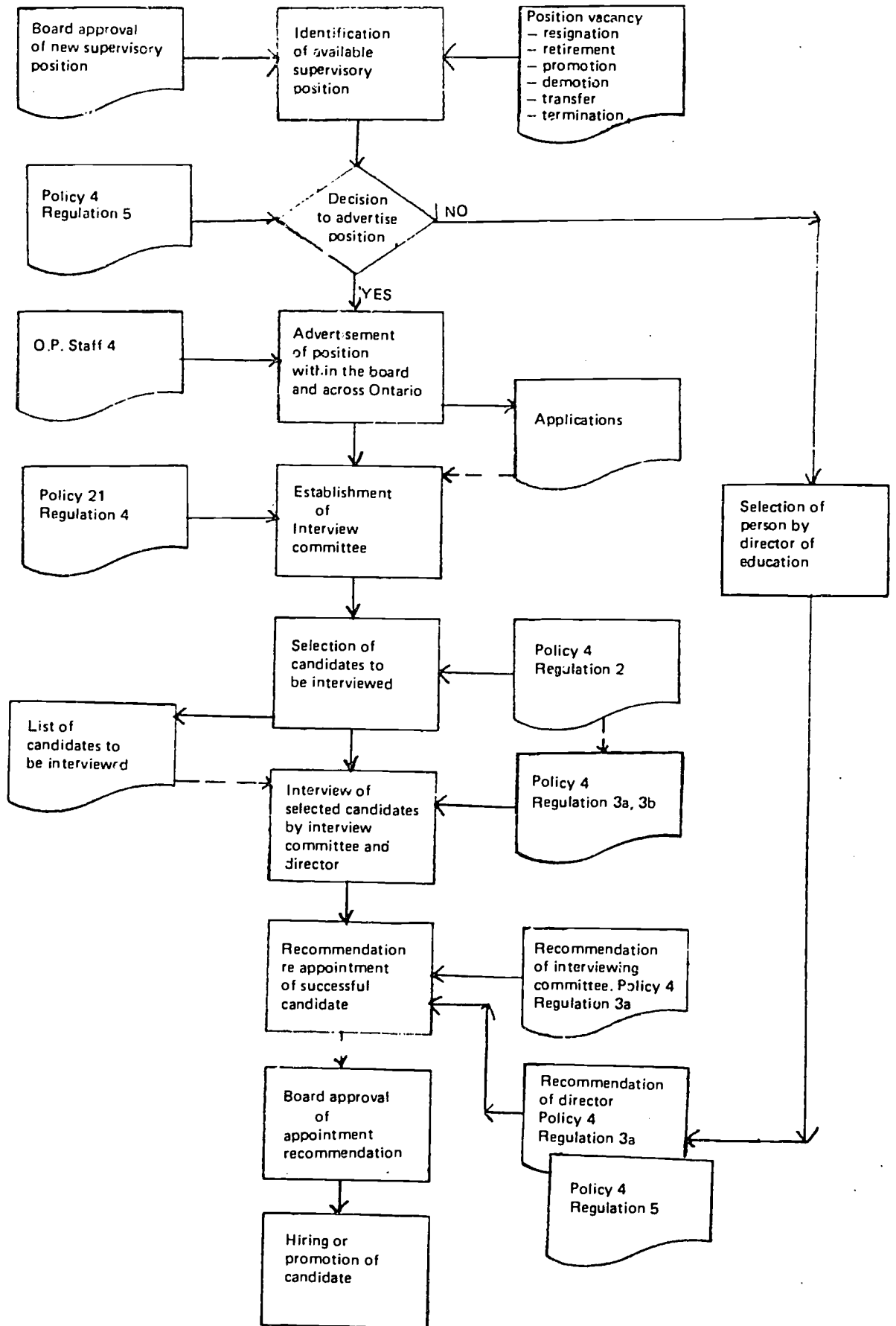
8.1.3.5 STAFF DEVELOPMENT: Credit and Non-credit Courses – Parent Volunteers



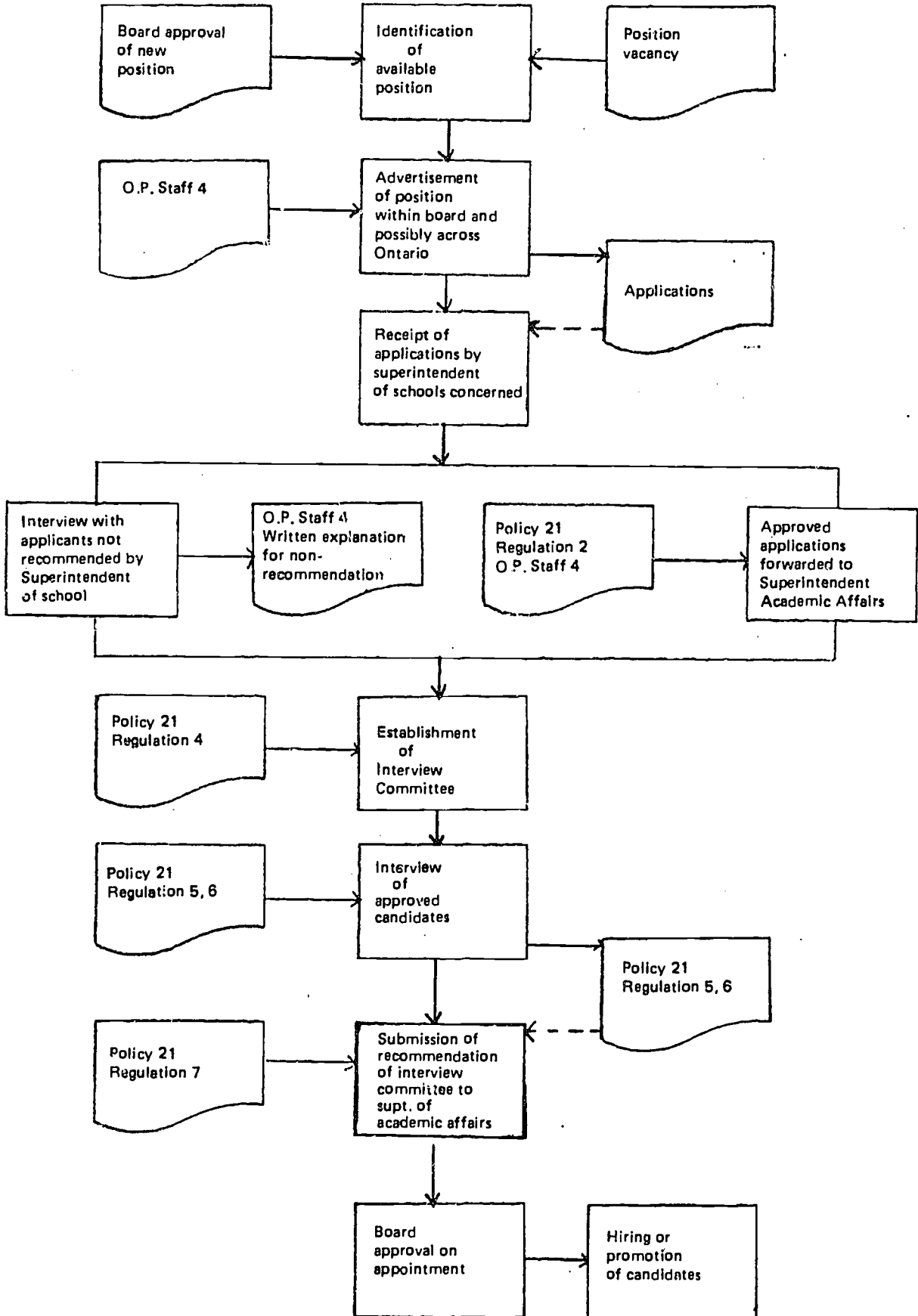
8.1.9 STAFF DEVELOPMENT: Professional Activity Days



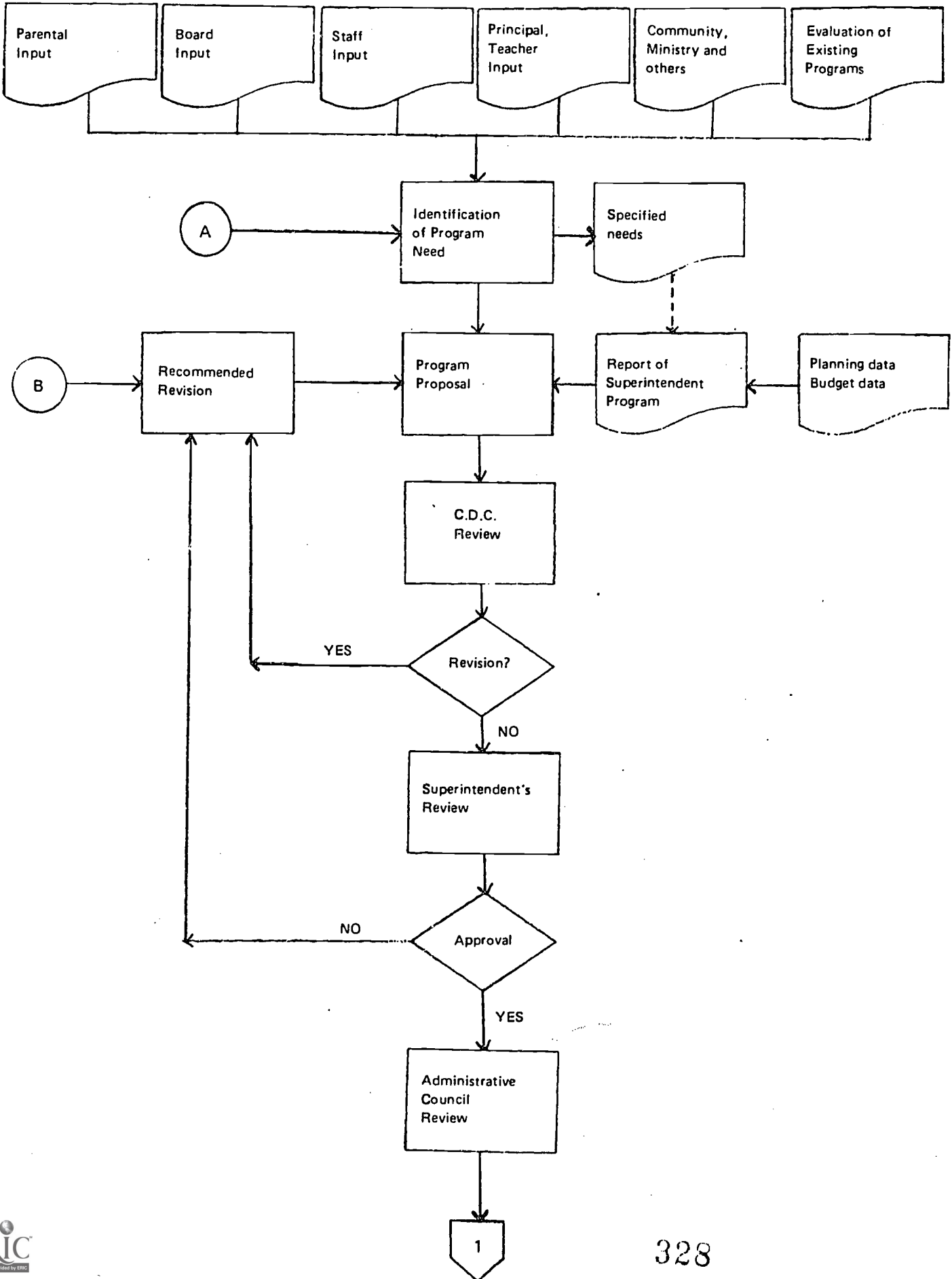
8.2.2 STAFF RELATIONS: Appointment of Administrative and Supervisory Personnel

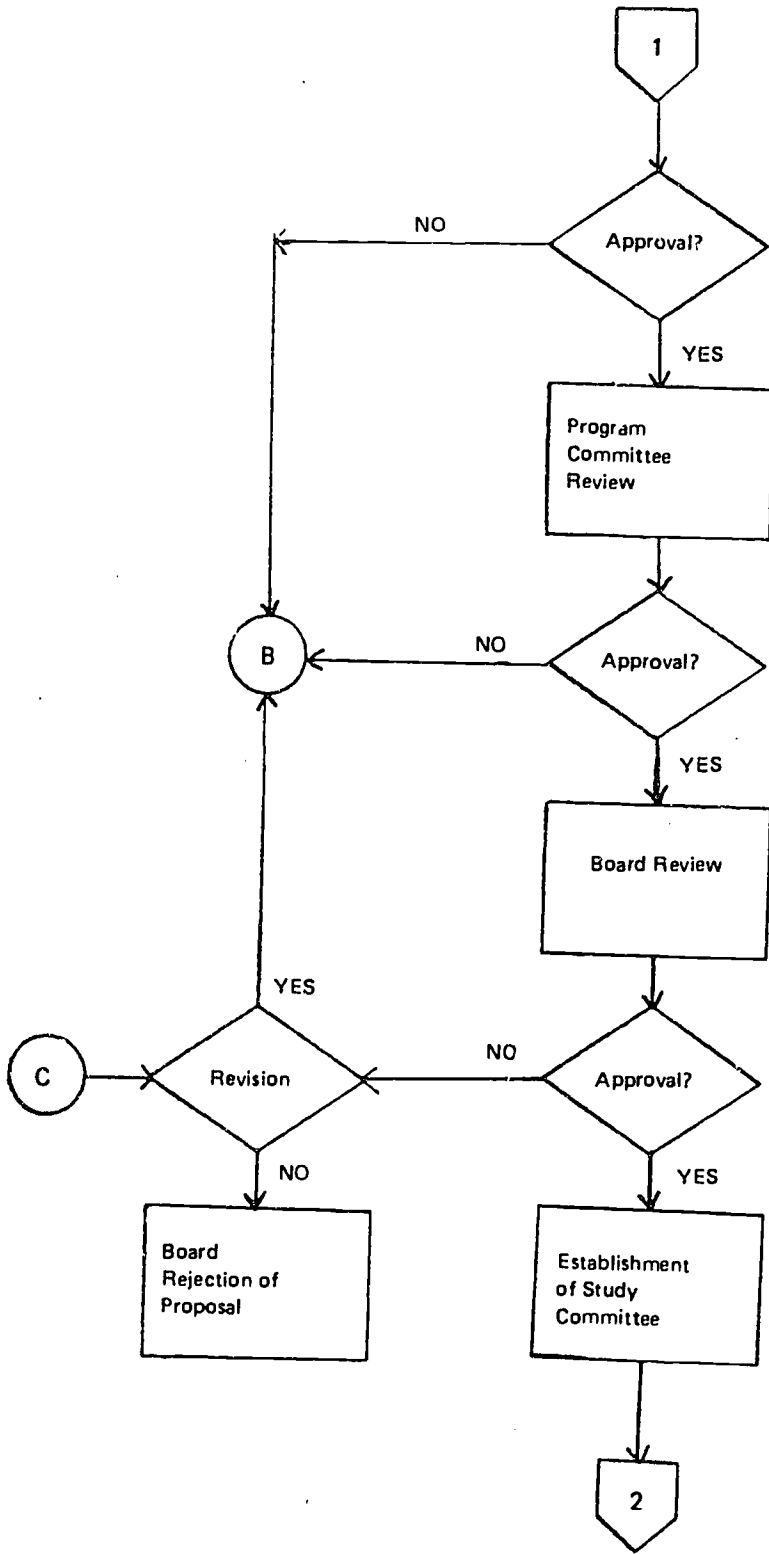


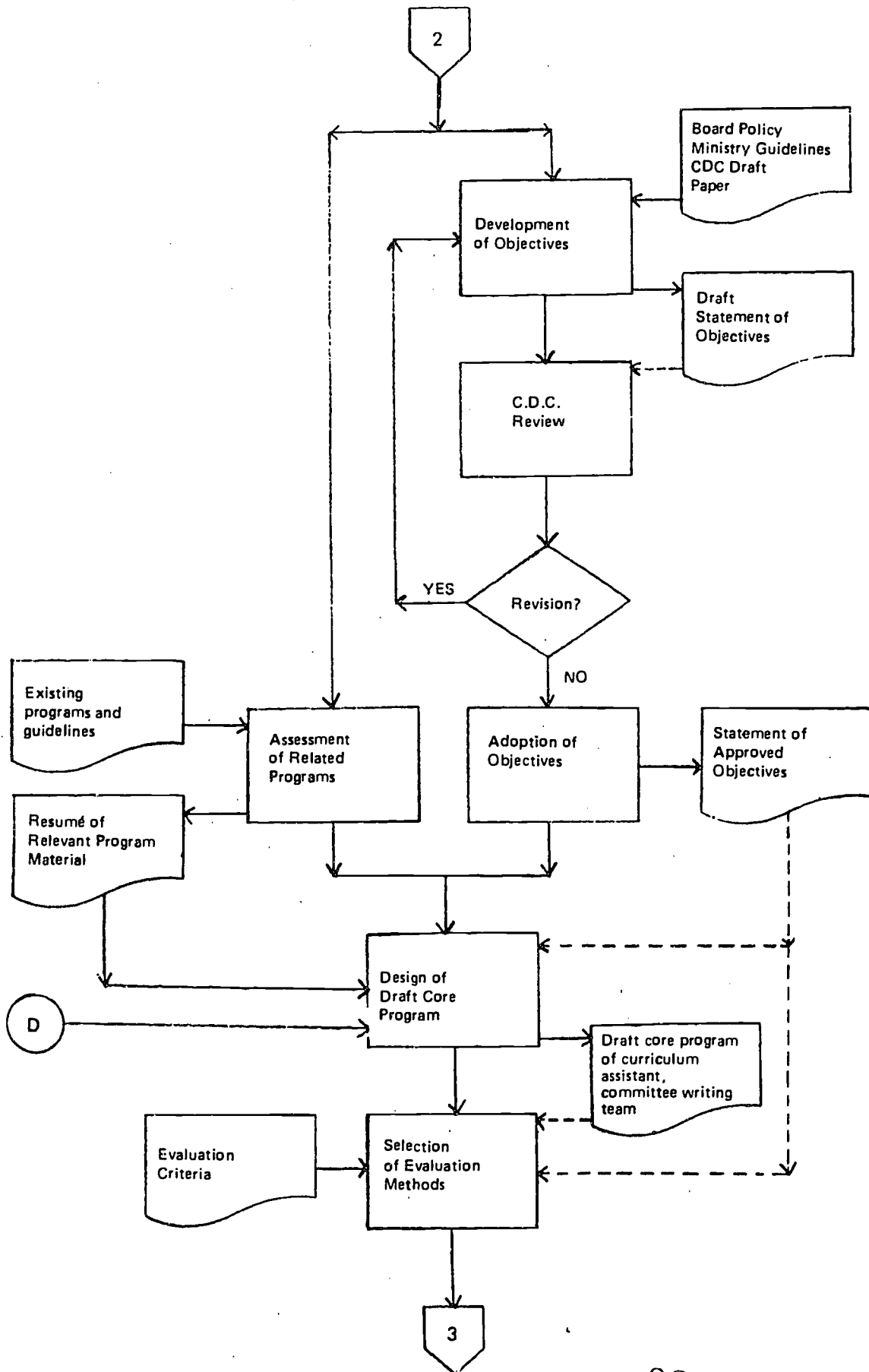
8.2.3 STAFF RELATIONS: Appointment of Principals, Vice-Principals, etc.

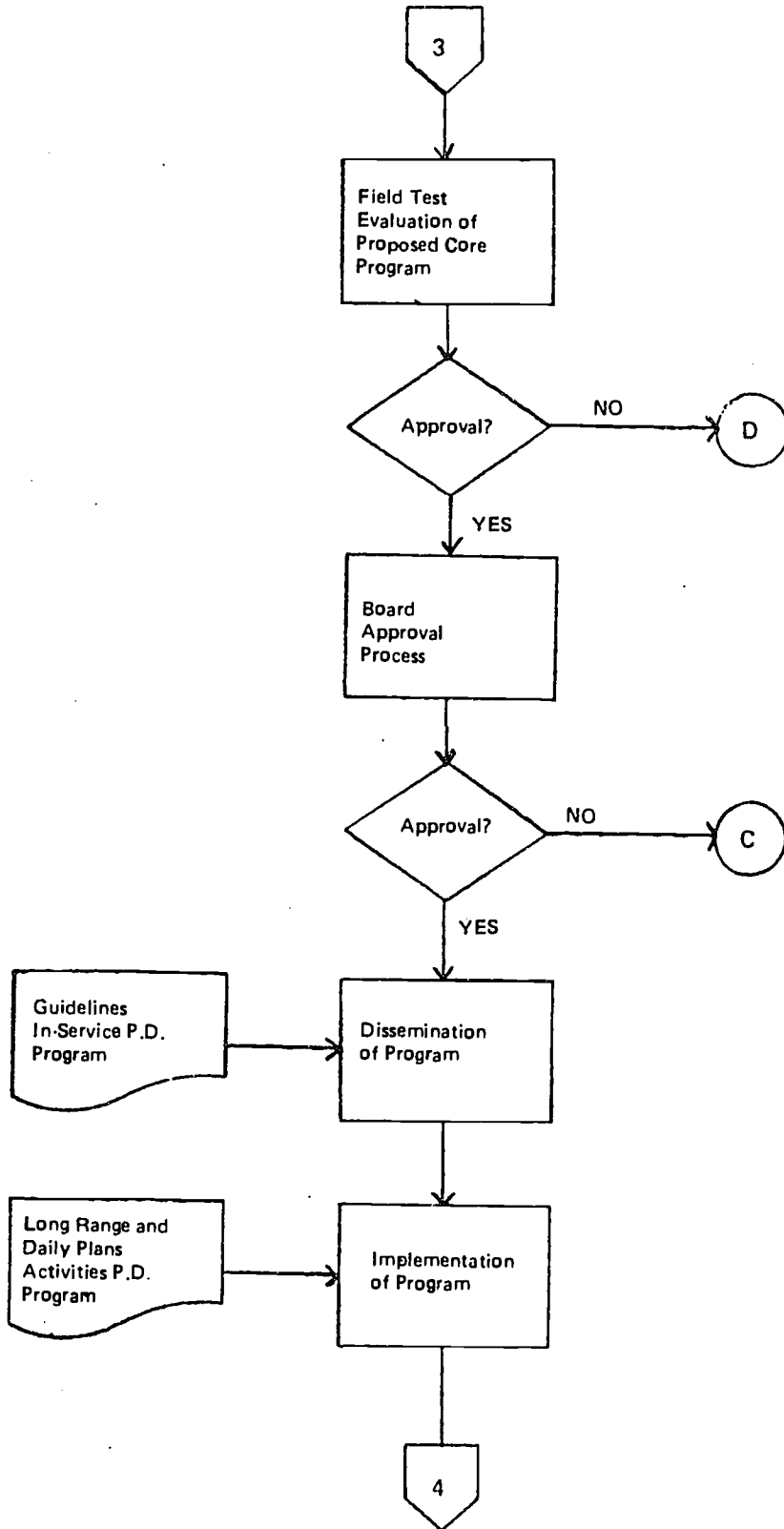


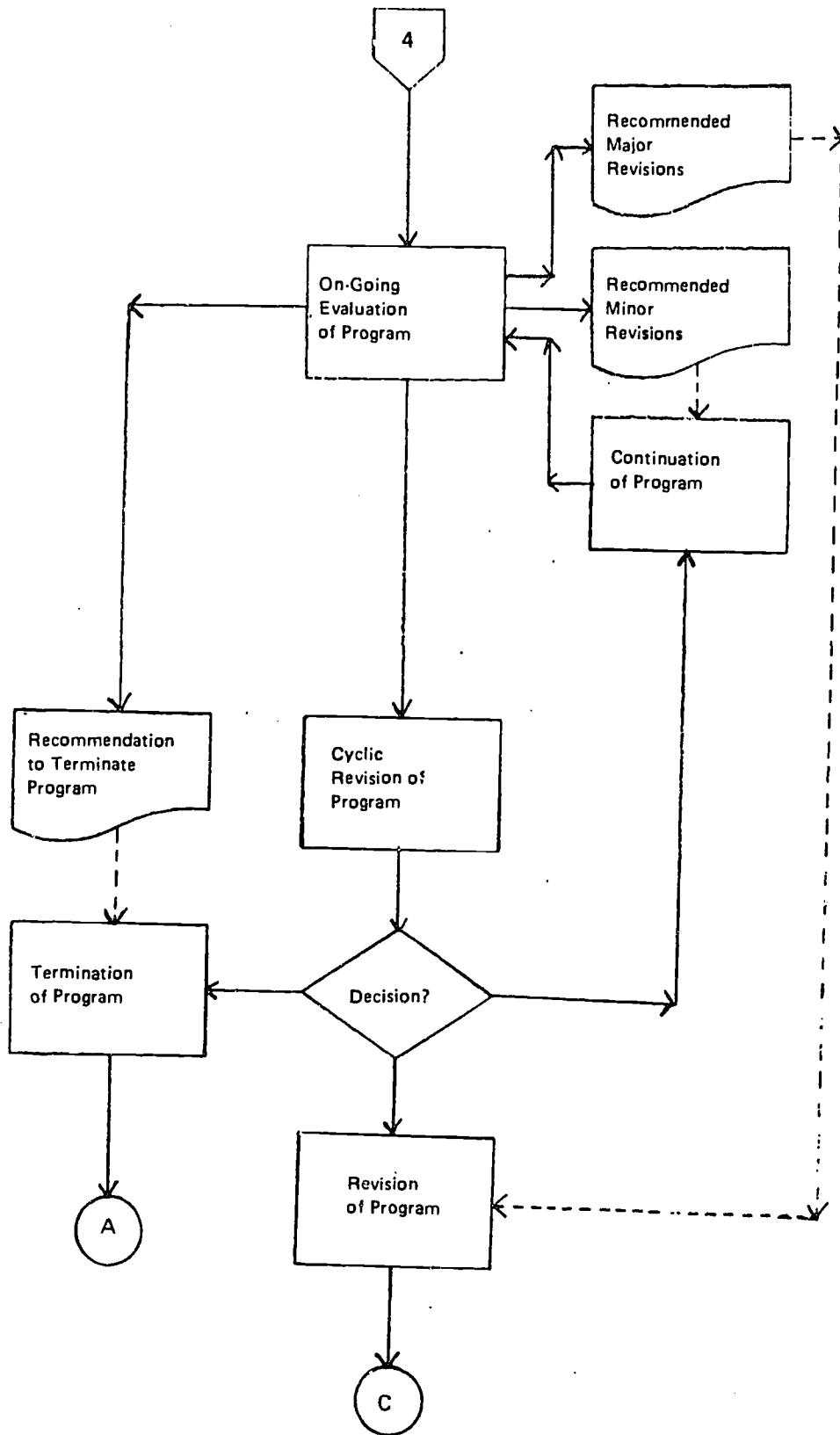
9.0 SCHOOL CURRICULUM (PROGRAM)



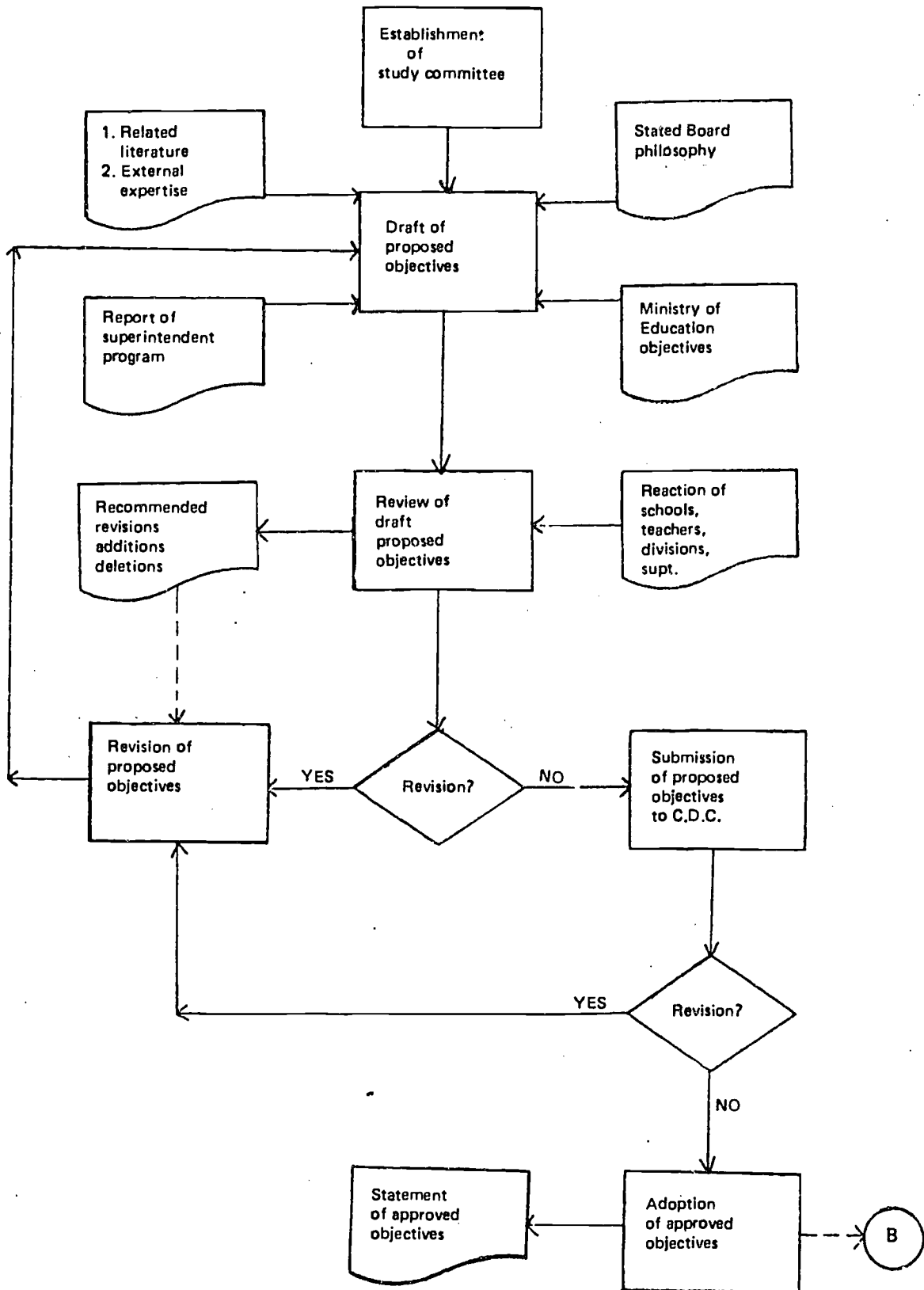




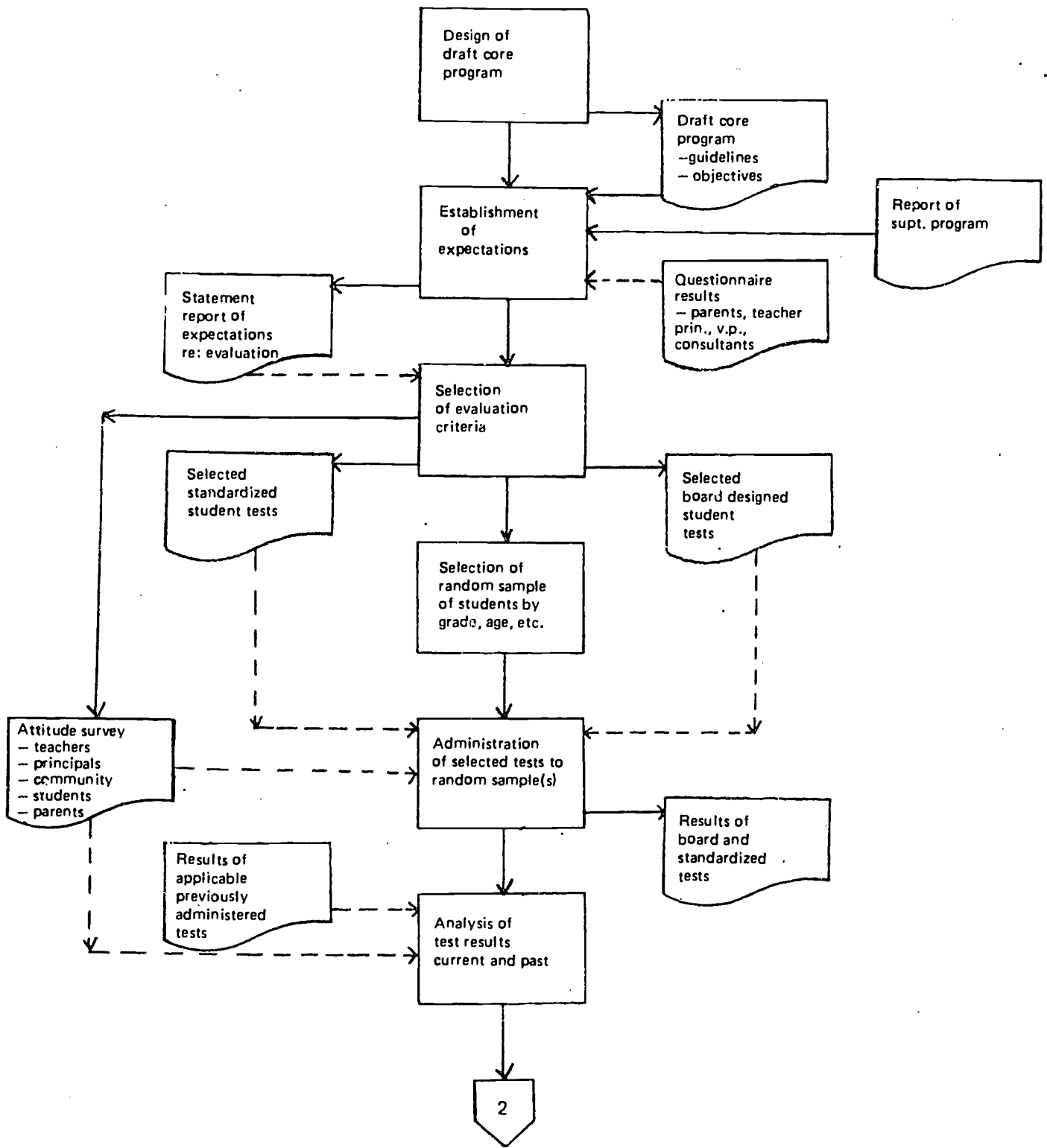




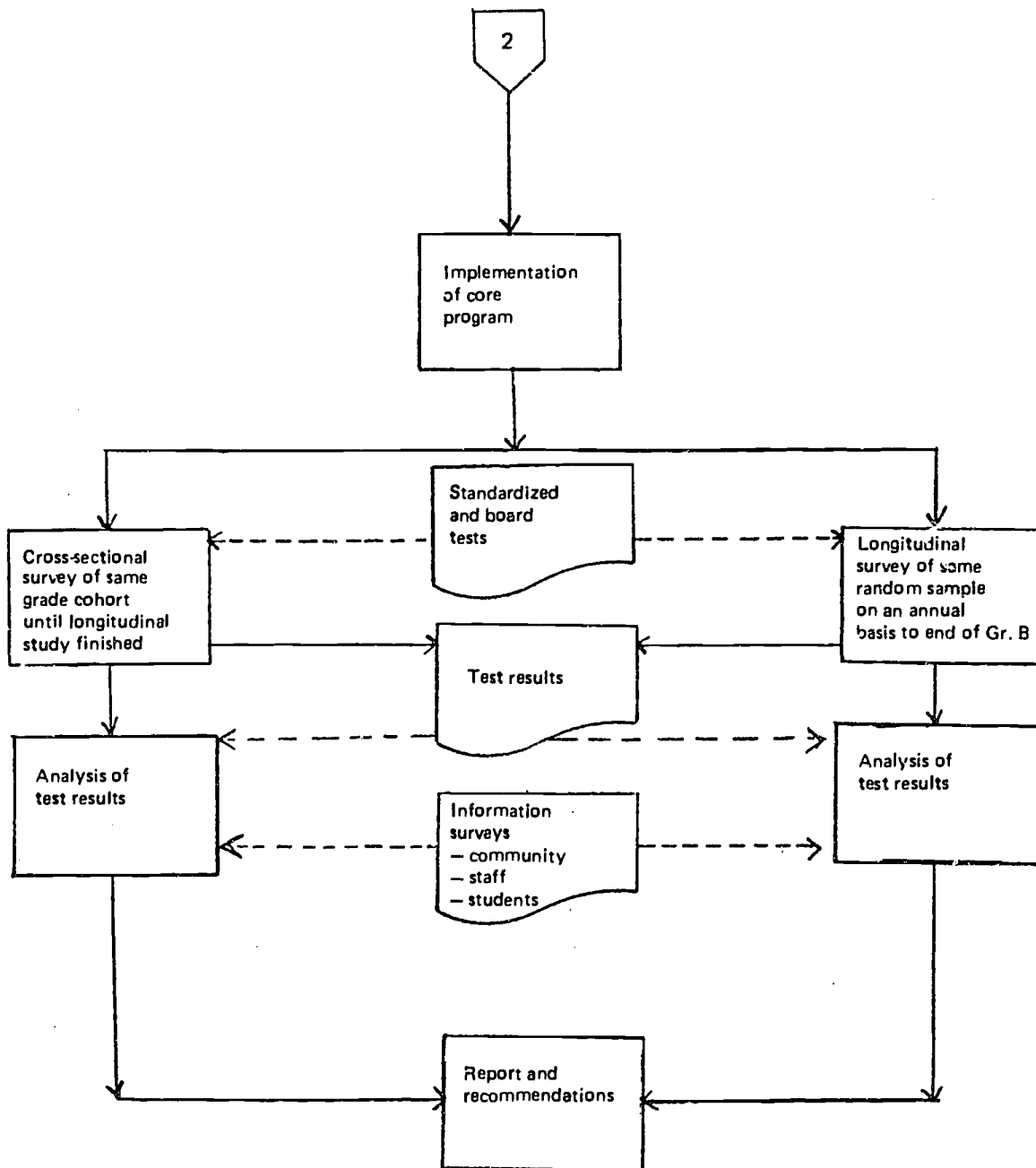
9.1.1 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation
 - Development of Objectives



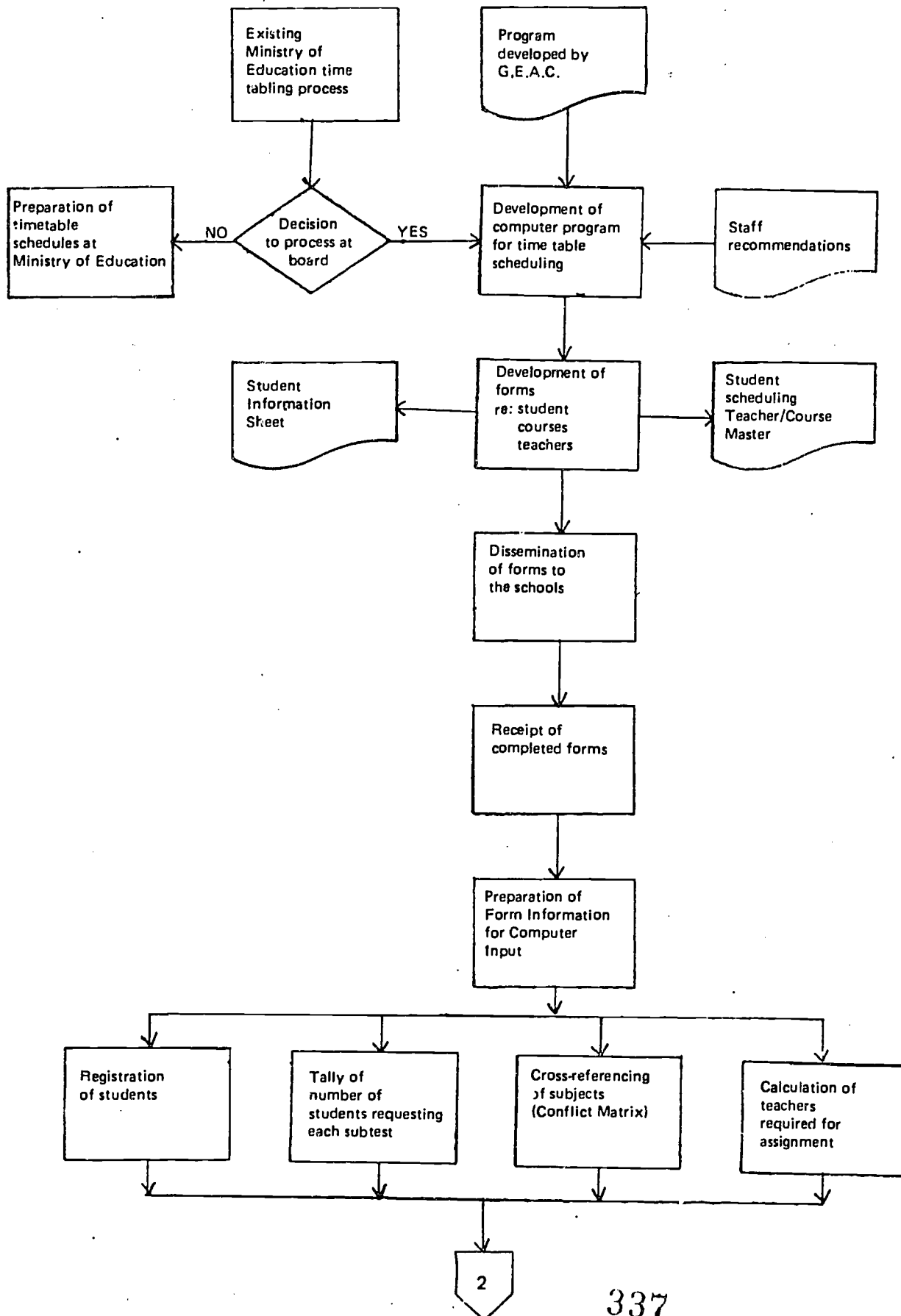
9.1.3 SCHOOL CURRICULUM (PROGRAM): Program Development and Evaluation
- Evaluation of Program

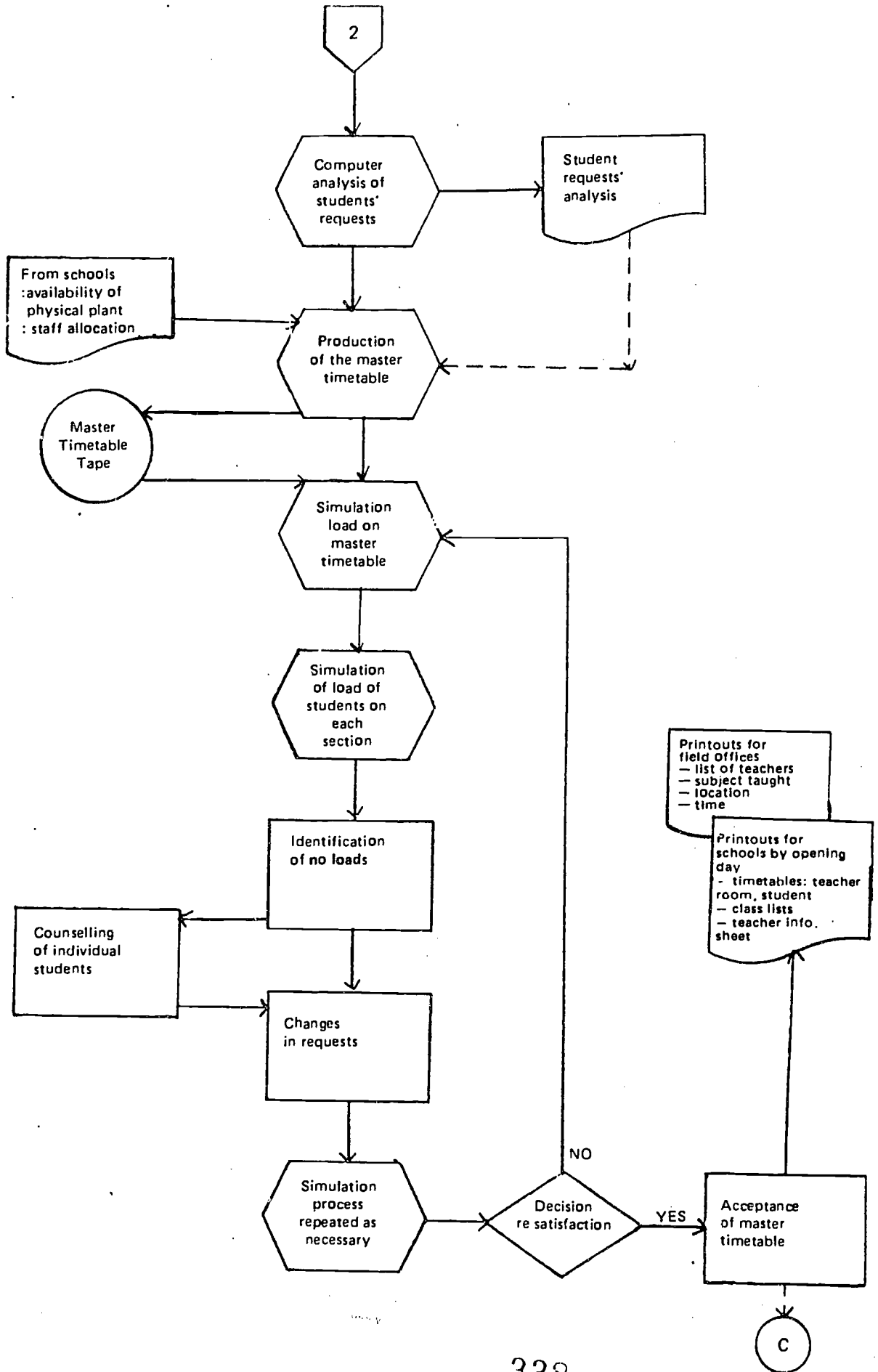


9.1.3 (cont'd)

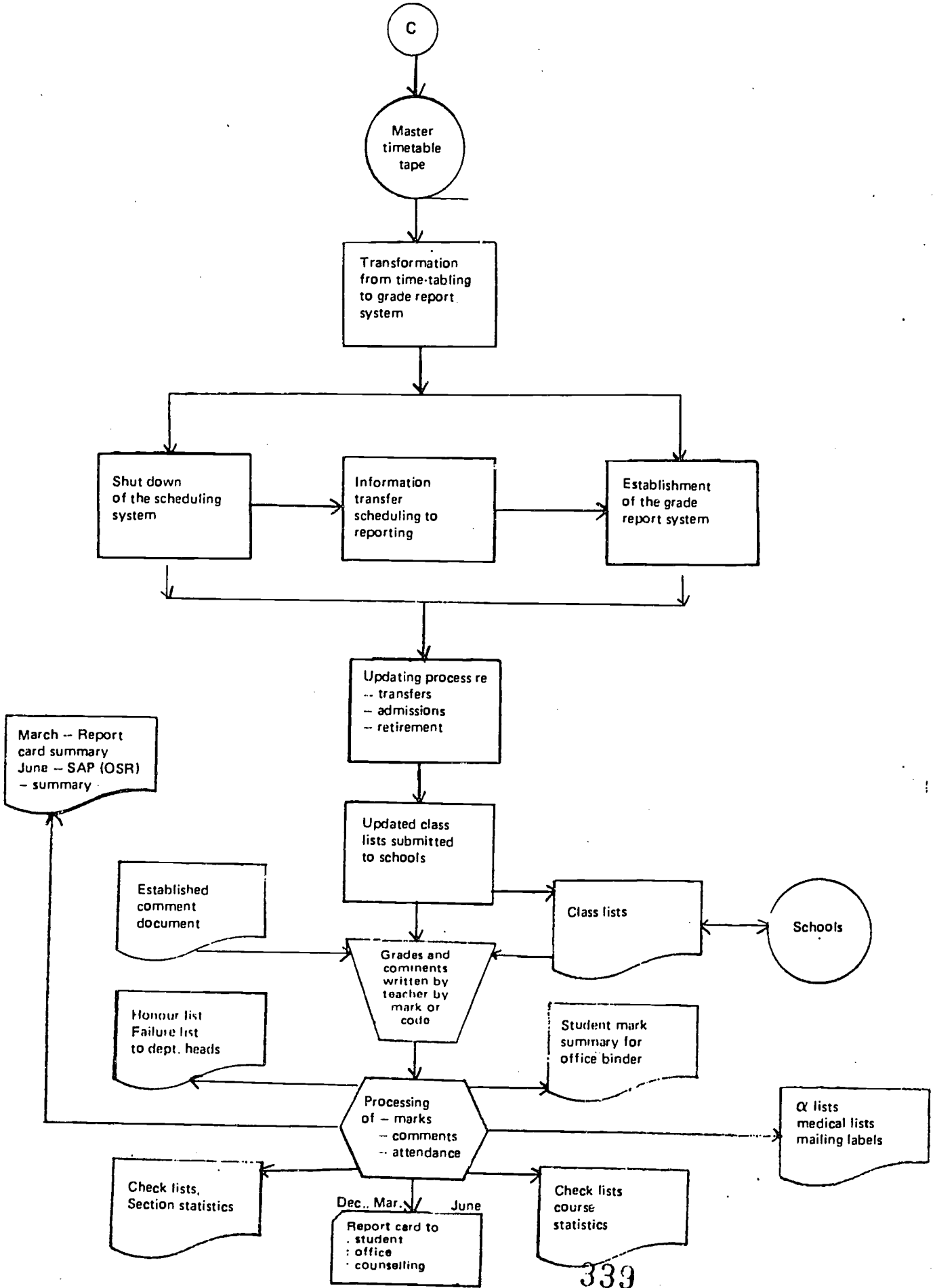


9.2.1 SCHOOL CURRICULUM (PROGRAM): Operations – Timetabling

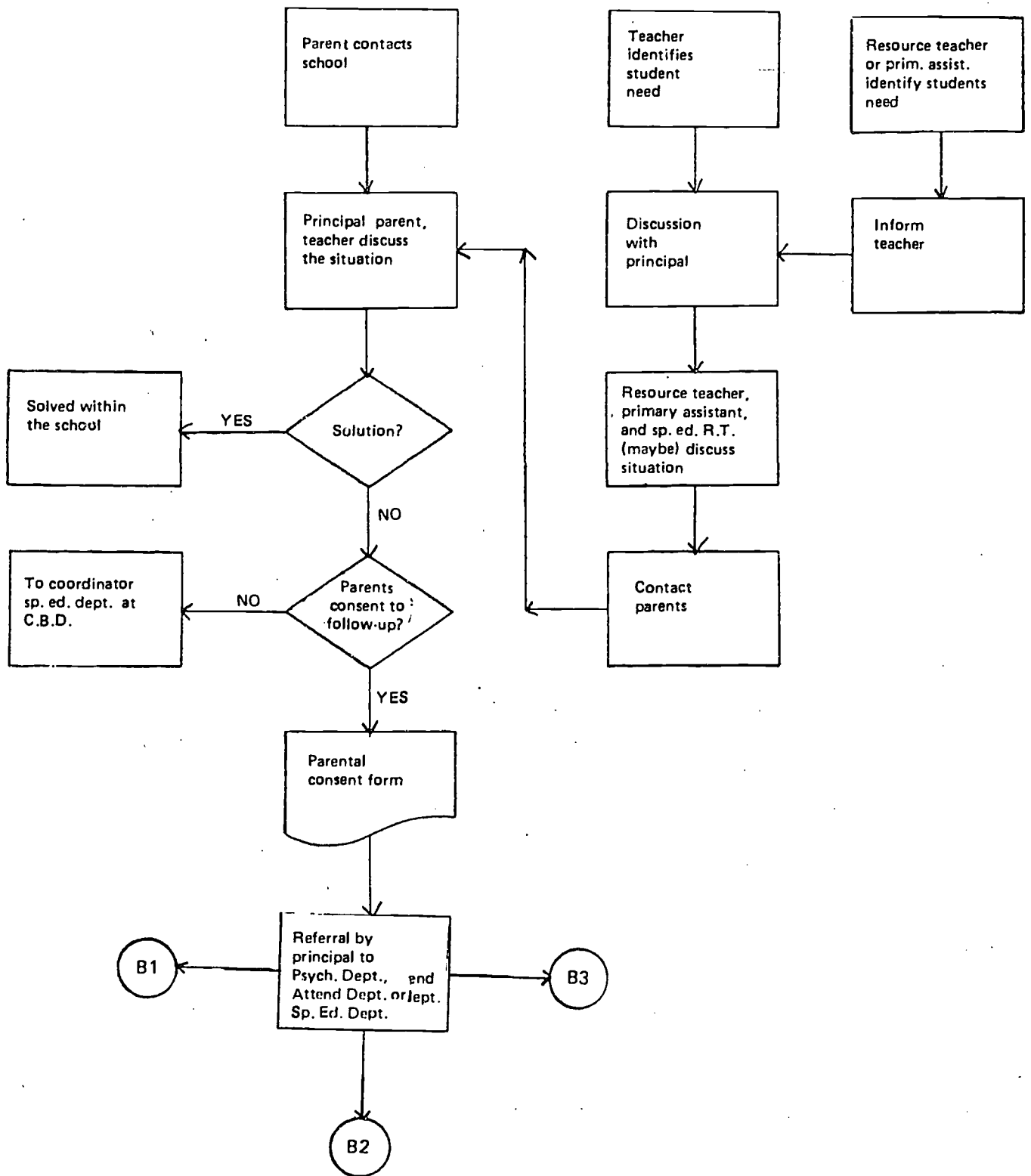




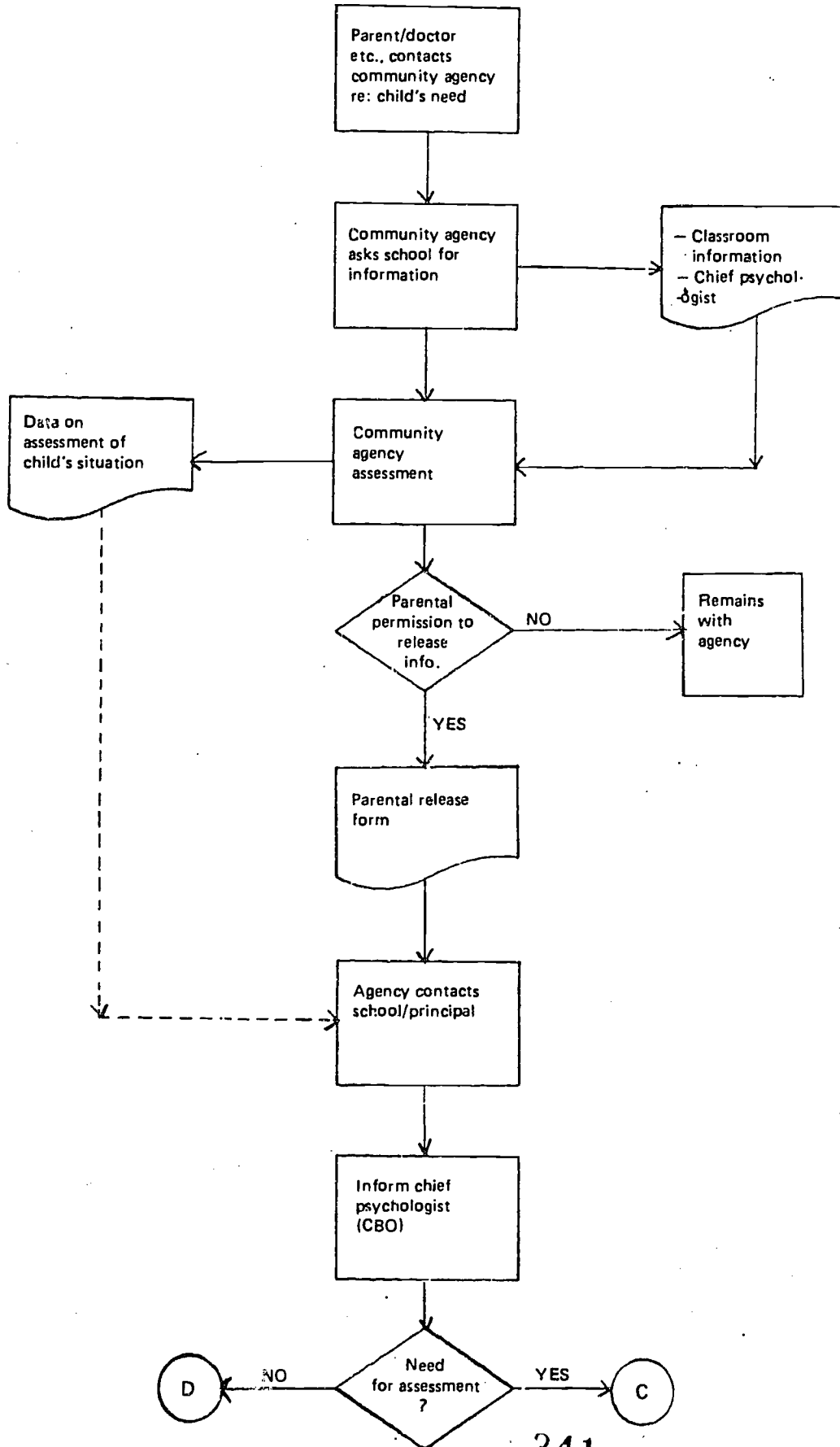
9.2.2 SCHOOL CURRICULUM (PROGRAM): Operations – Grade Reporting



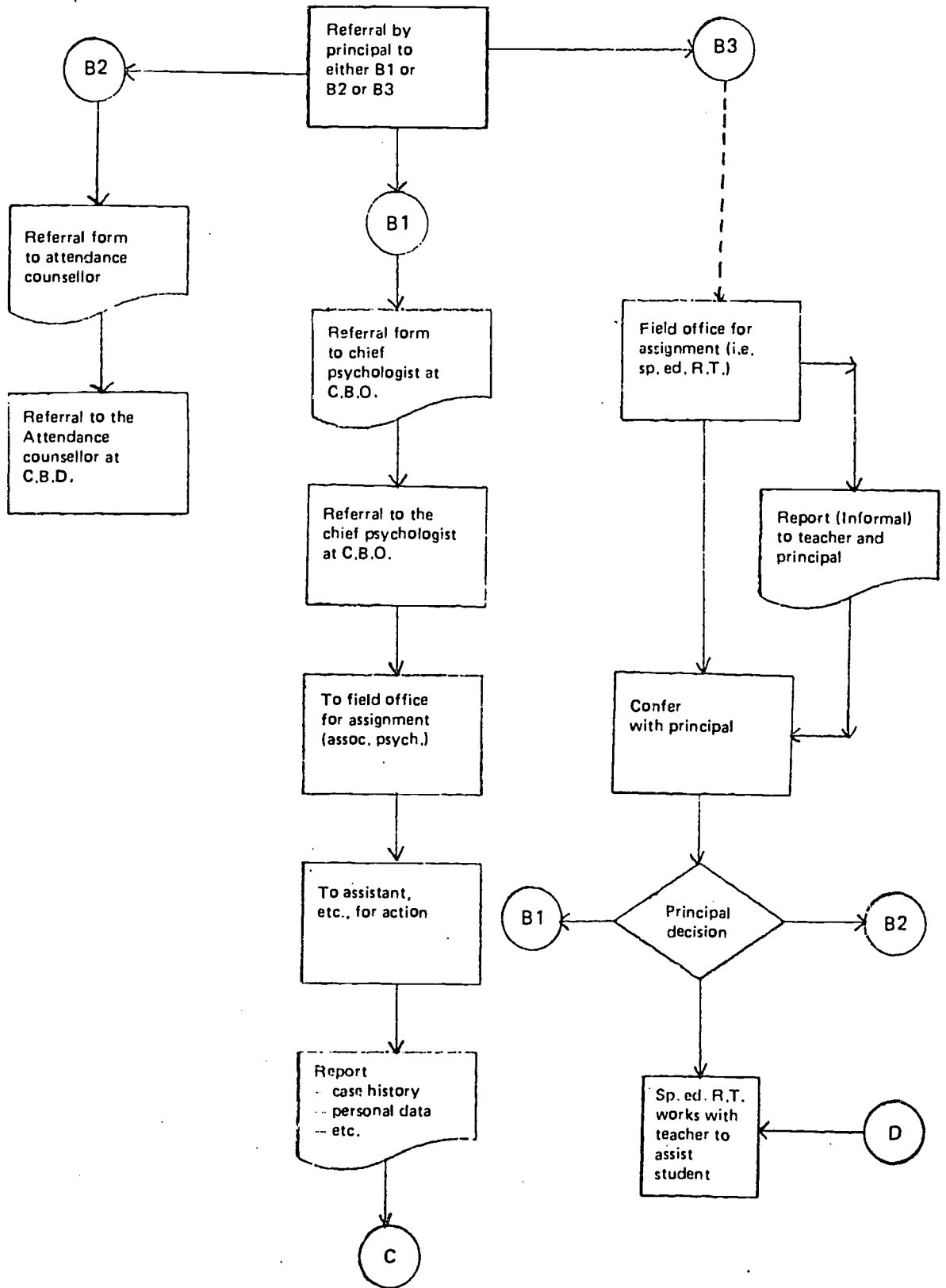
10.1.1.1 SPECIAL STUDENT SERVICES: Identification of Student Need
a) INTERNAL



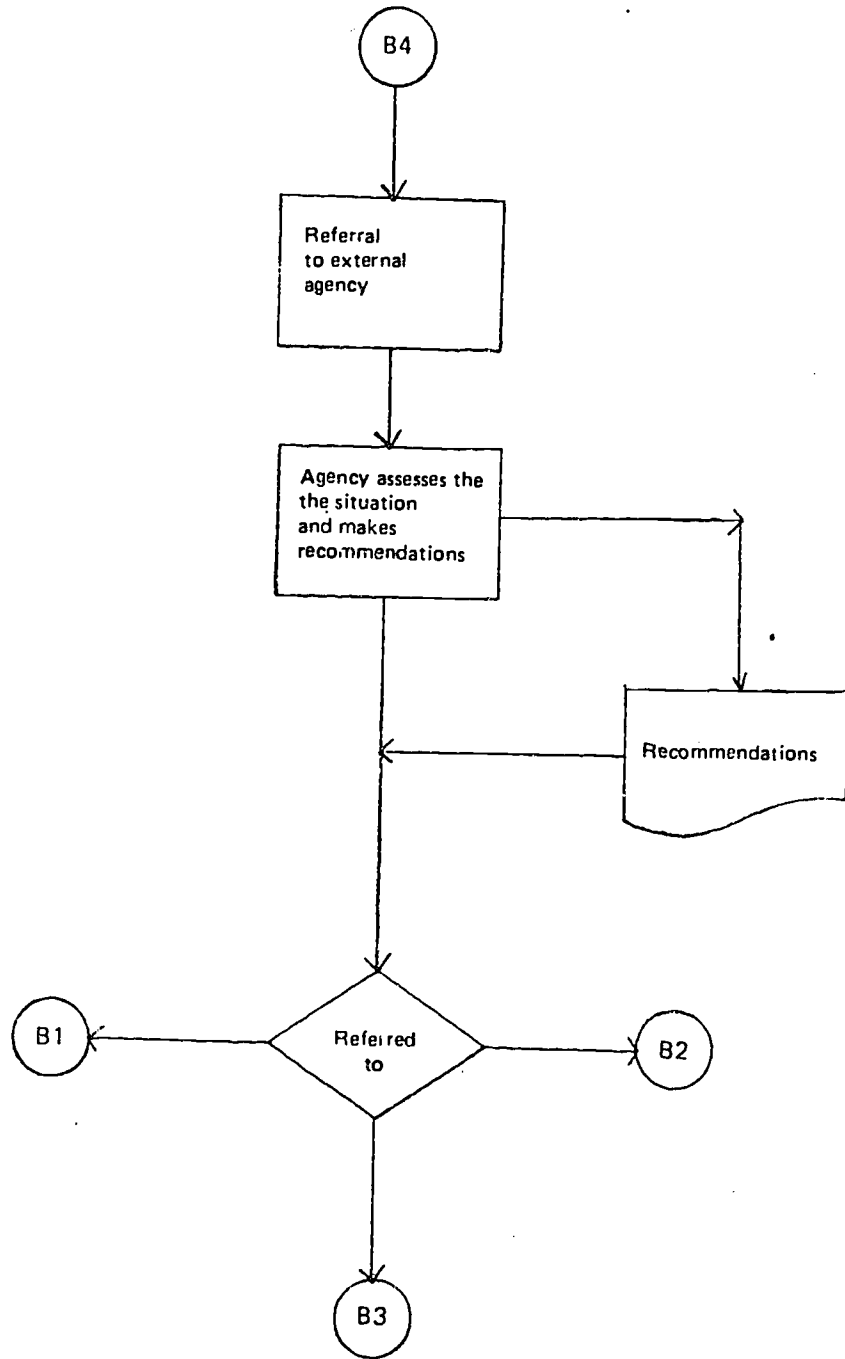
10.1.1.2 SPECIAL STUDENT SERVICES: Identification of Student Need
b) EXTERNAL

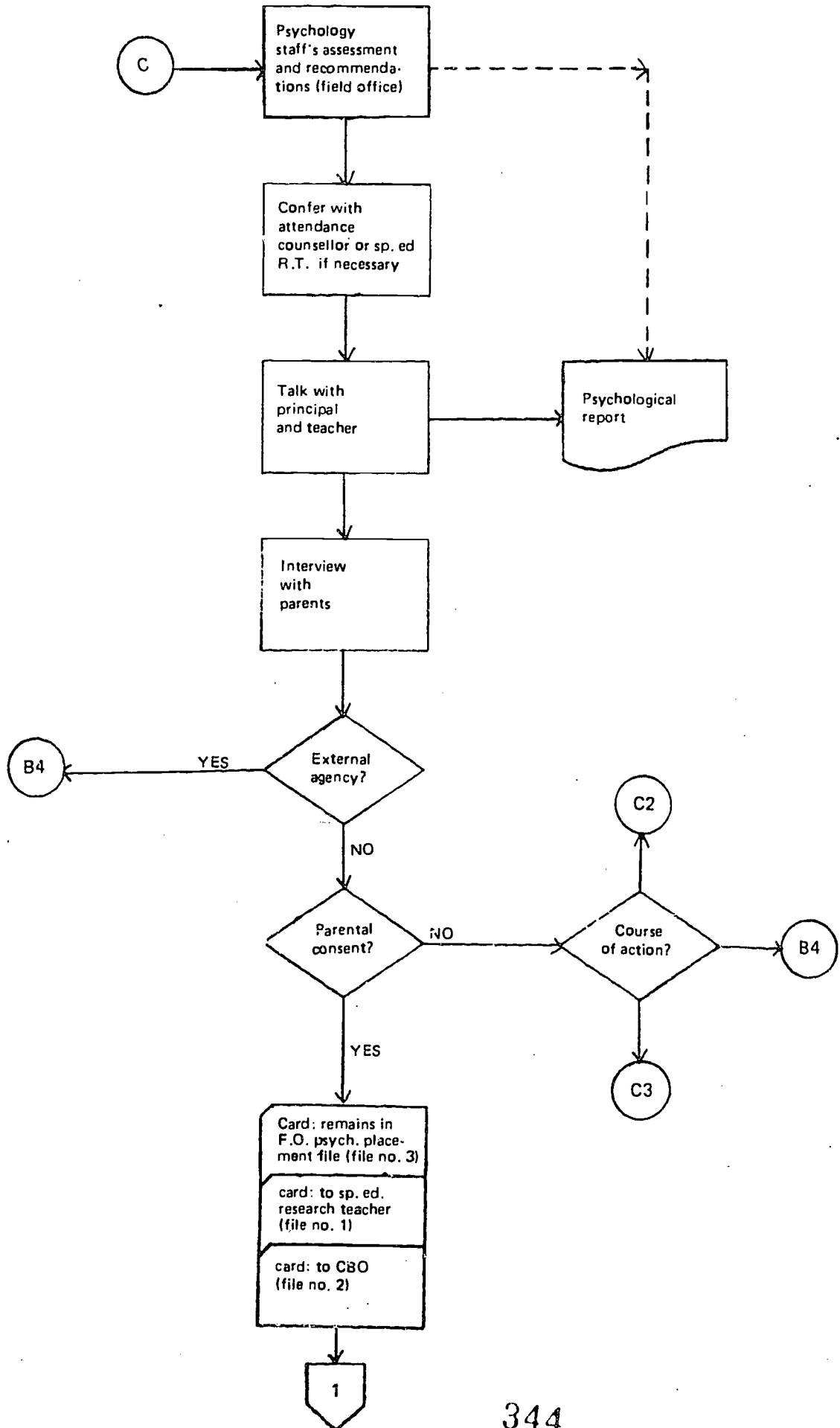


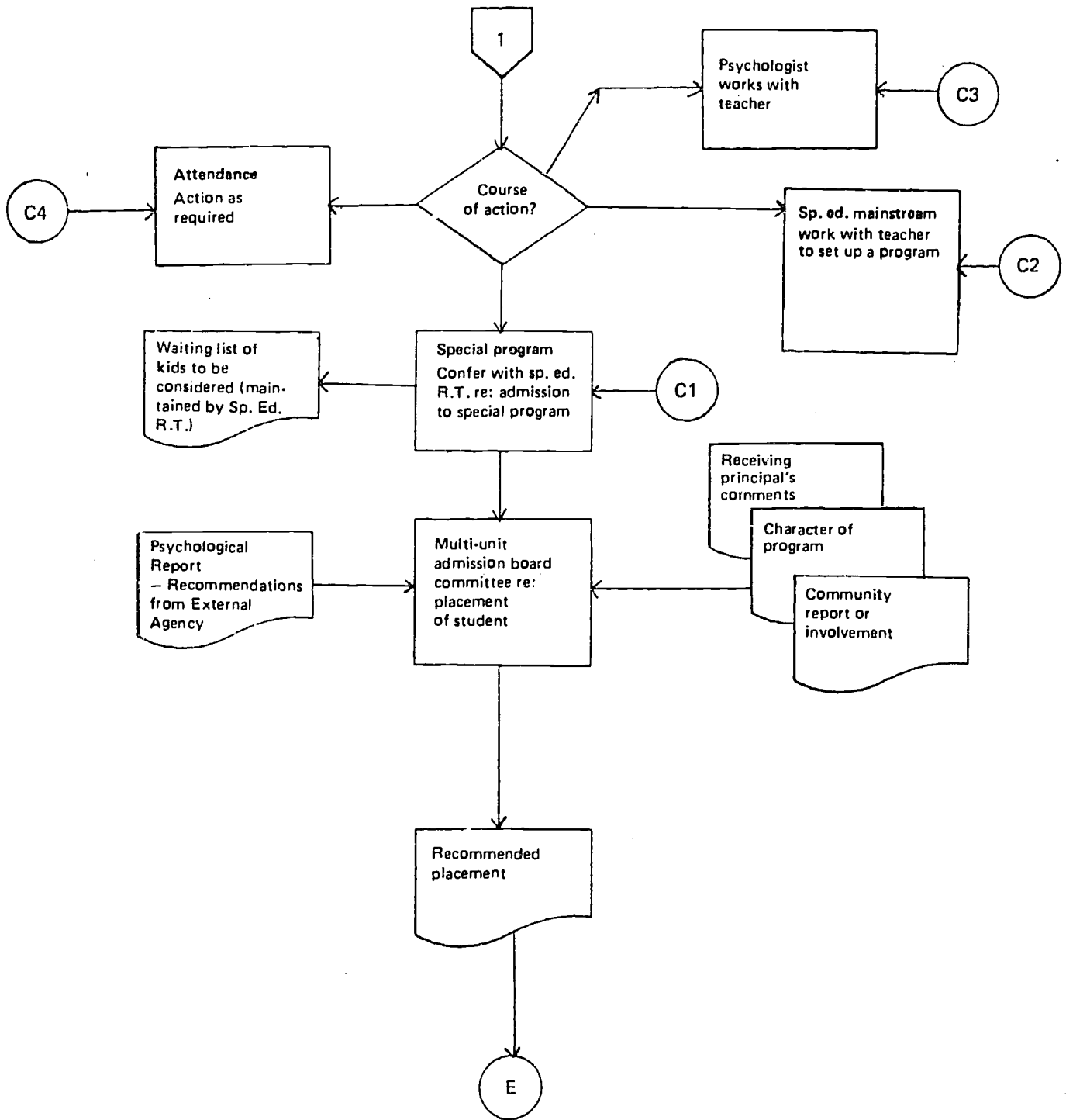
10.1.2.1 SPECIAL STUDENT SERVICES: Assessment of Student
a) Internal

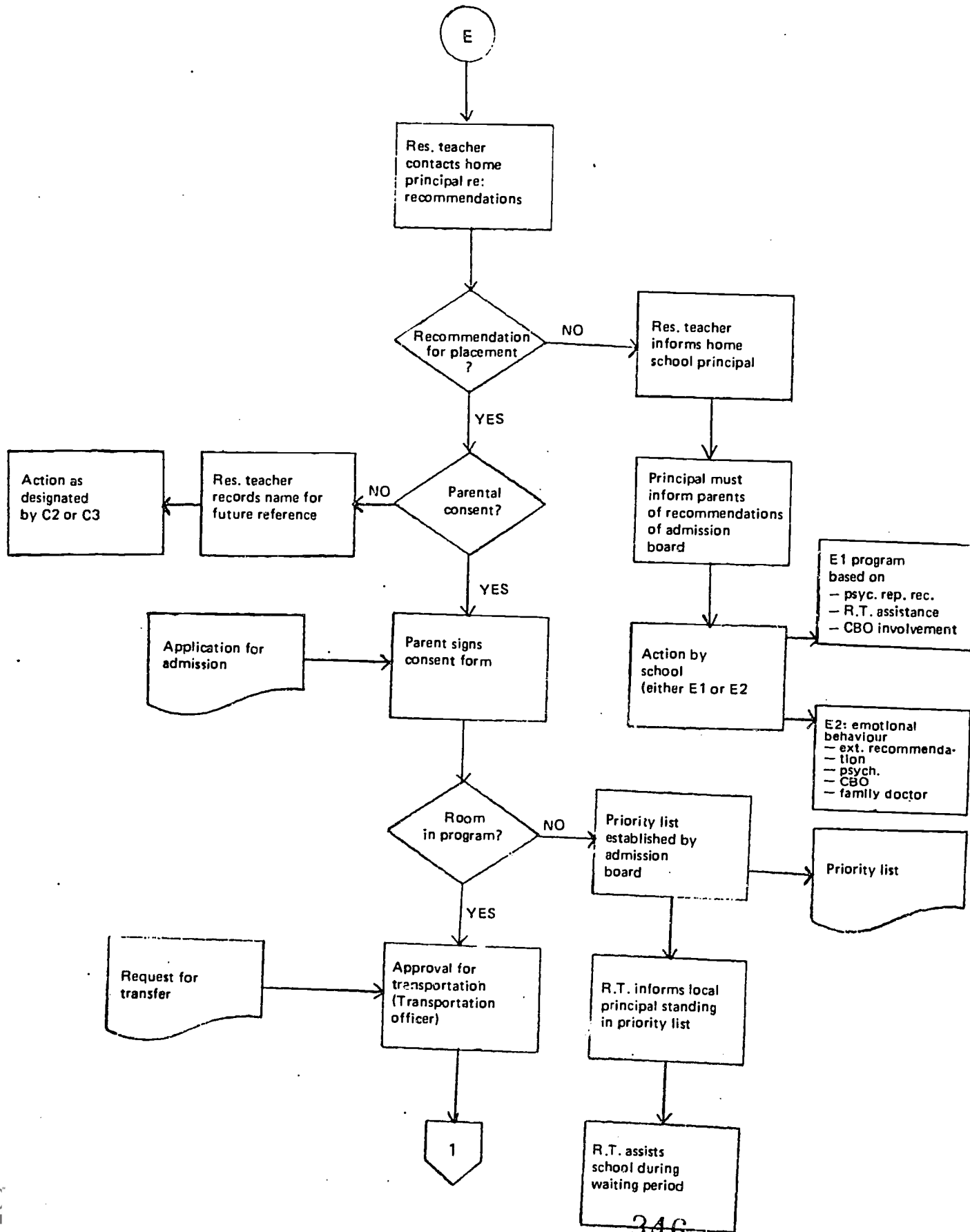


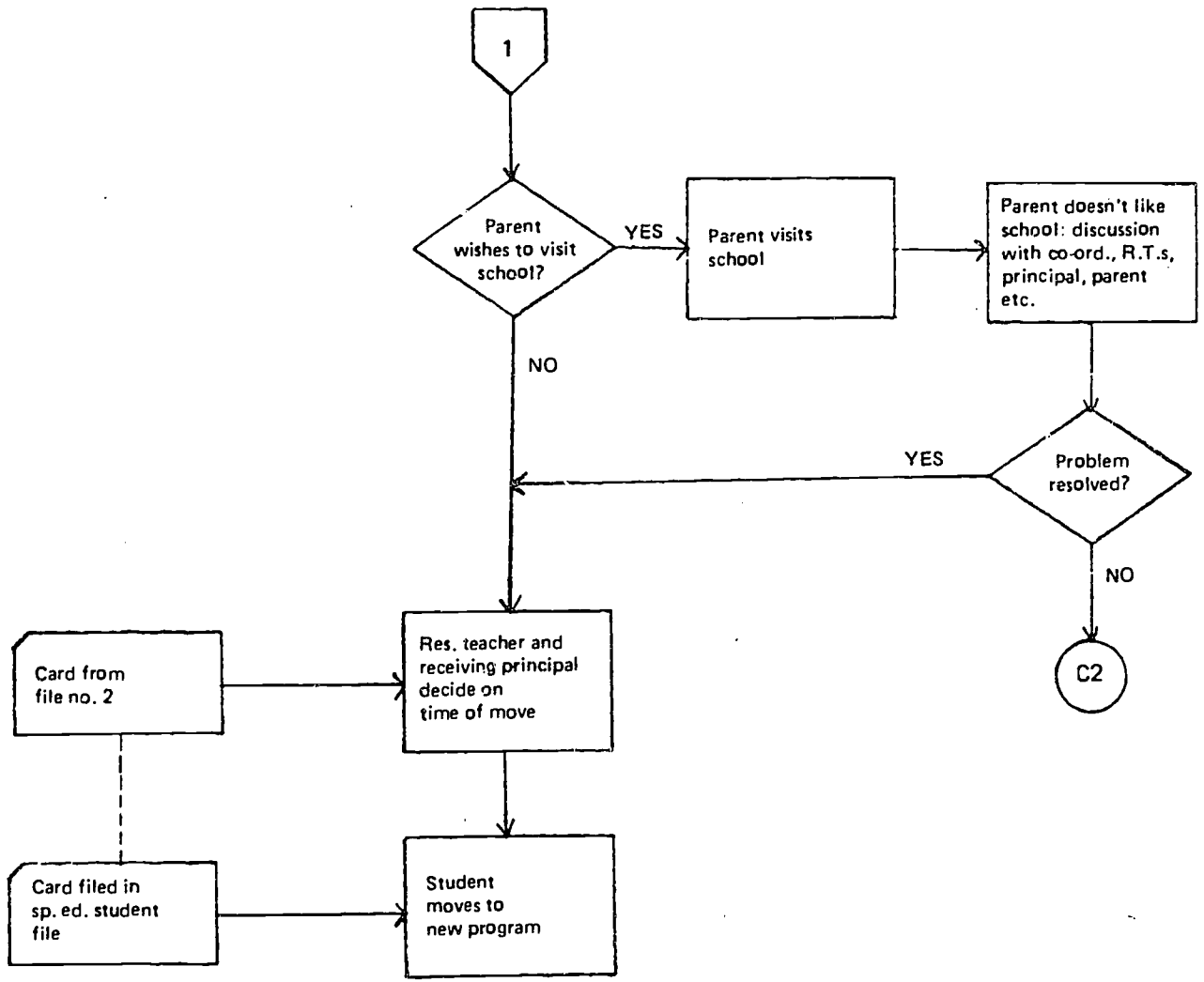
10.1.2.2 SPECIAL STUDENT SERVICES: Assessment of Student
(b) External



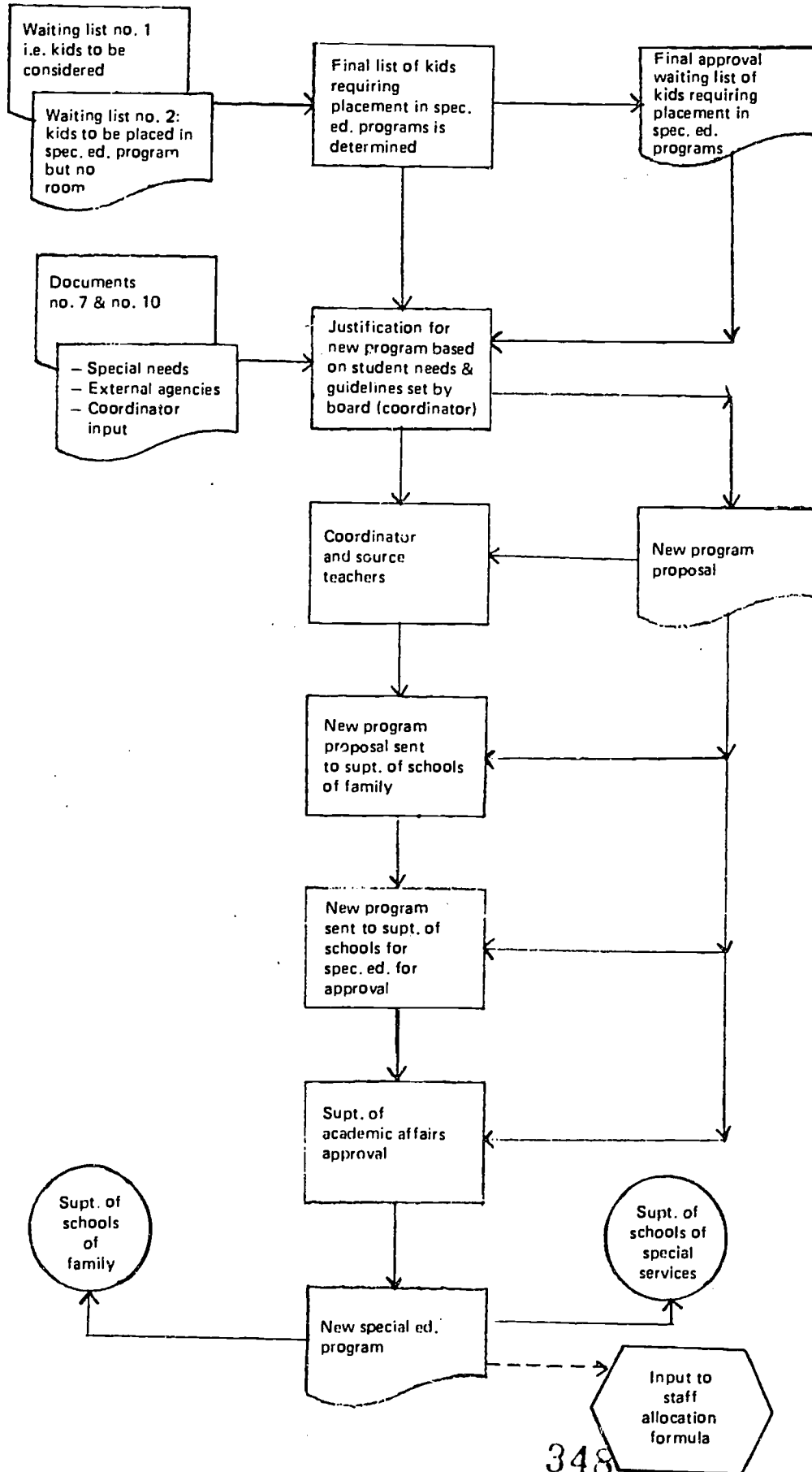






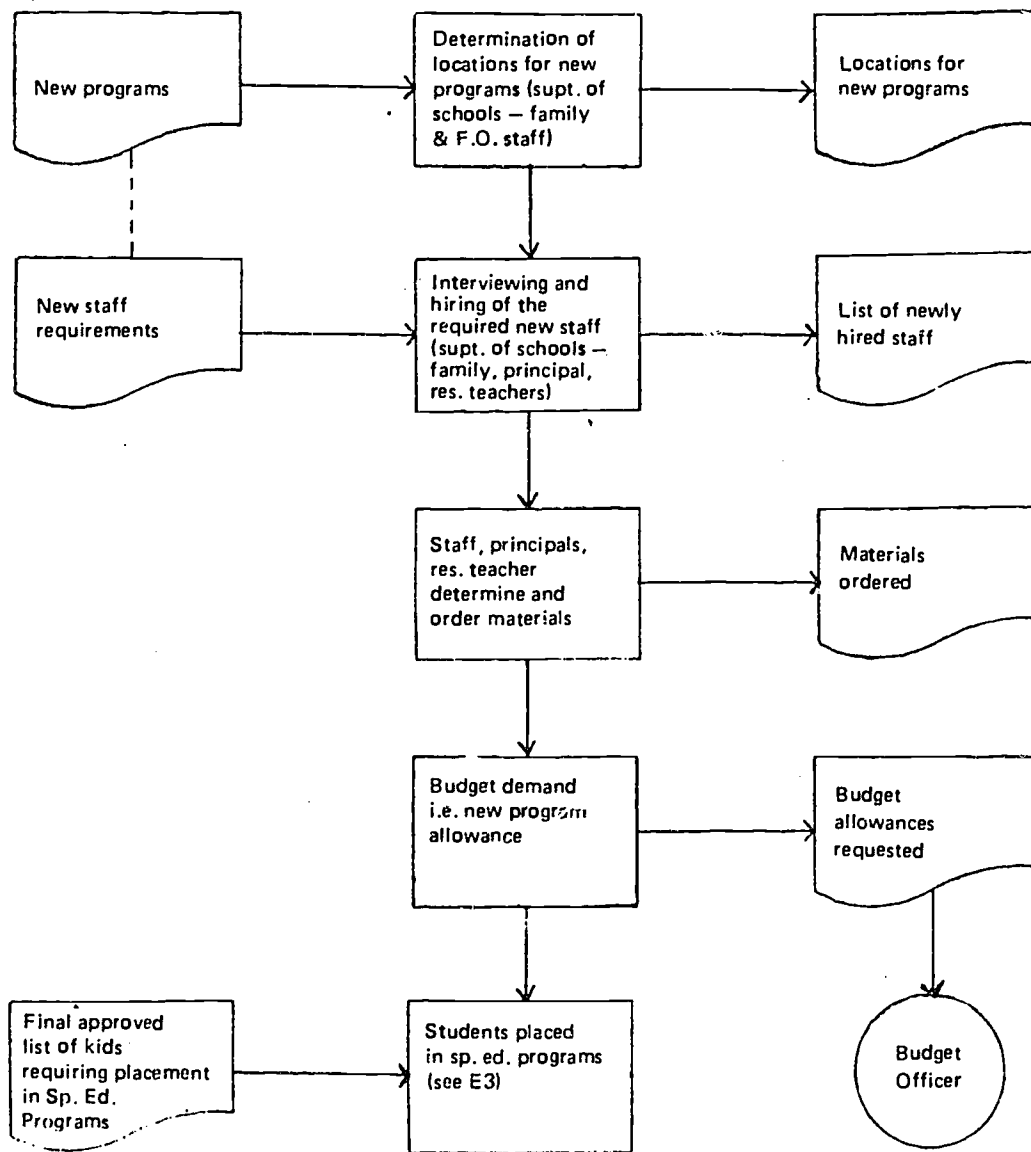


10.1.5.1 SPECIAL STUDENT SERVICES: Program Planning
 a) Program Demand

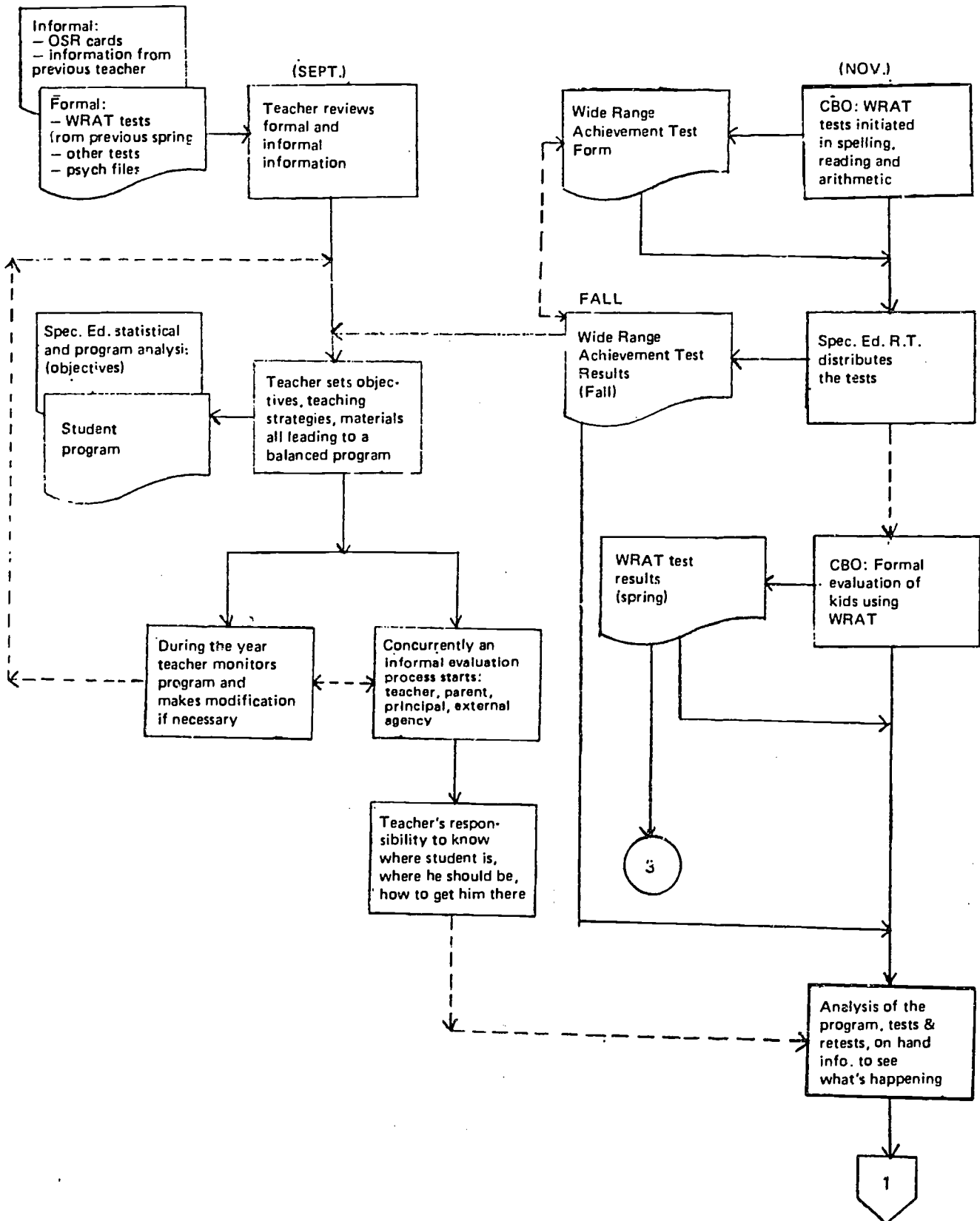


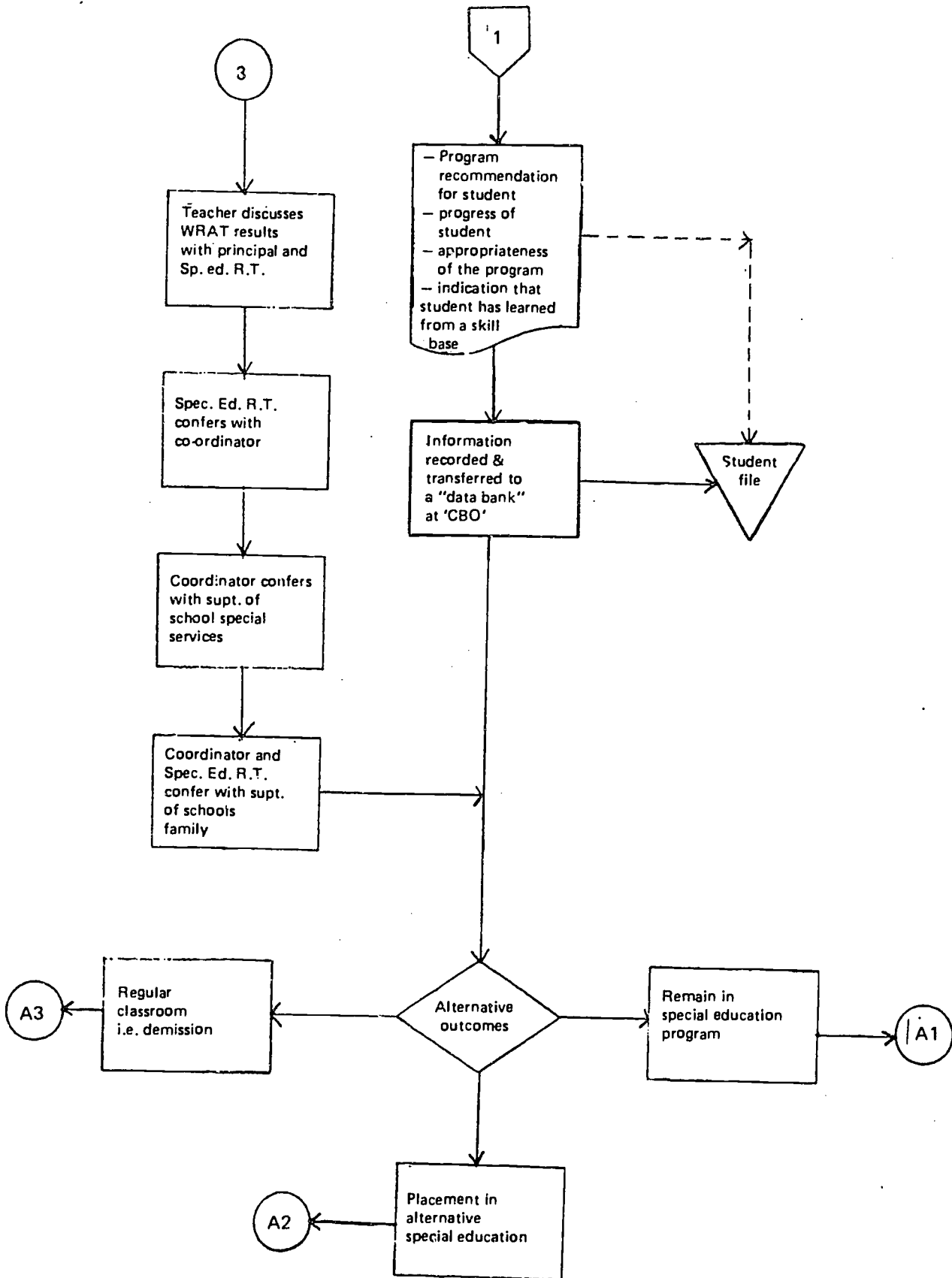
10.1.5.2 SPECIAL STUDENT SERVICES: Program Planning

b) Staff/Facilities/Materials/Budget Demand



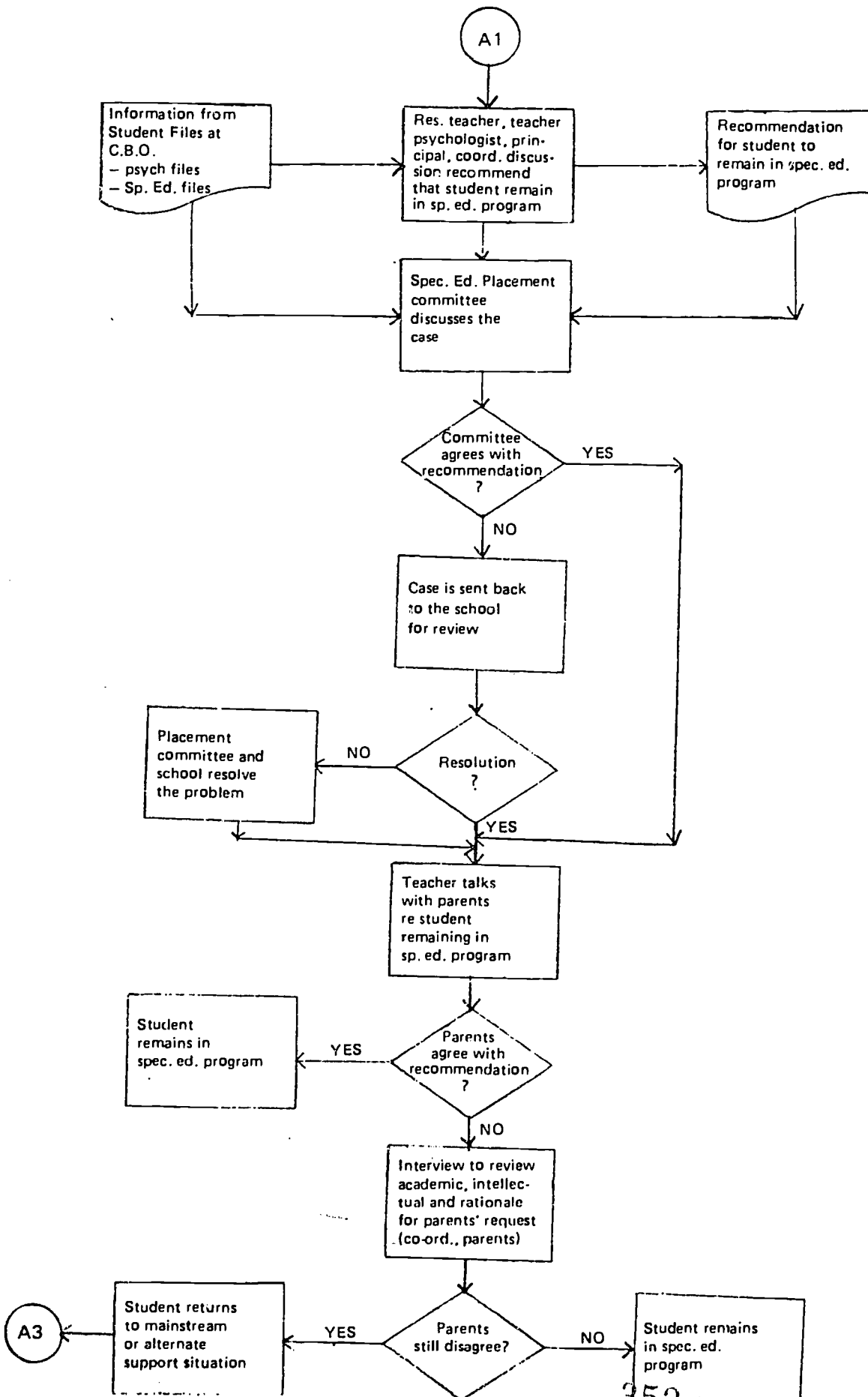
10.1.6 SPECIAL STUDENT SERVICES: On-going Evaluation



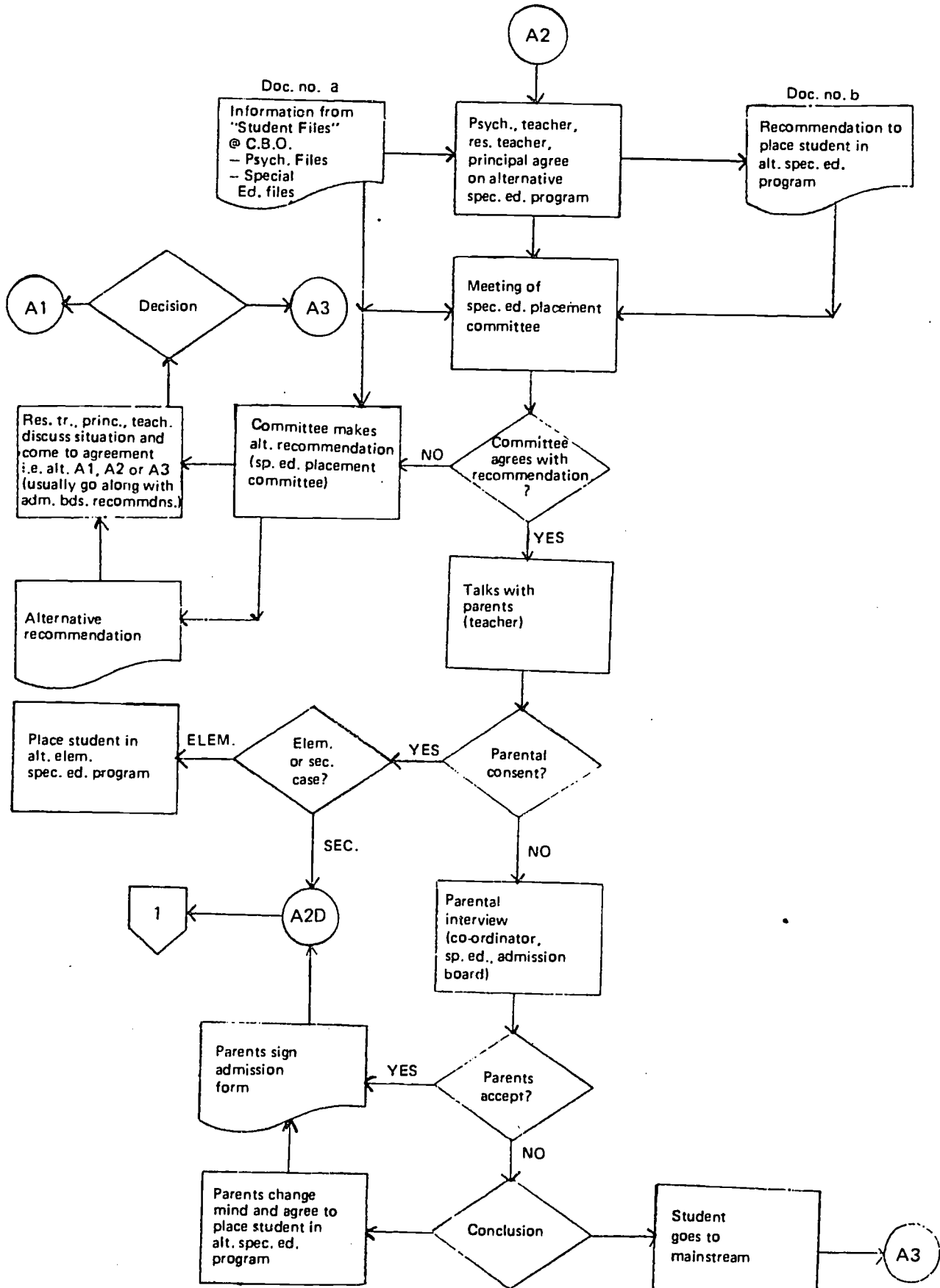


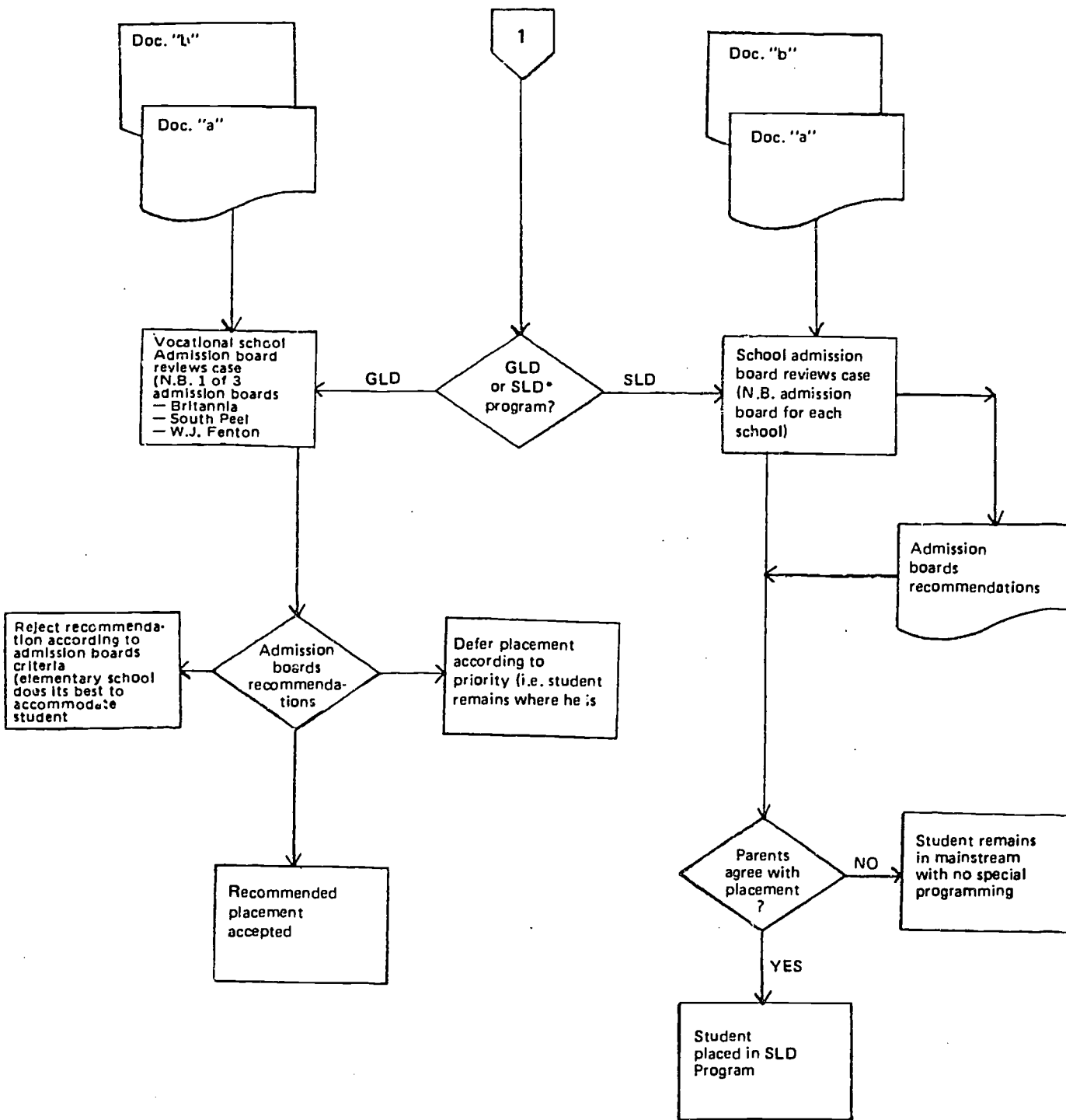
10.1.6.1 SPECIAL STUDENT SERVICES: On-going Evaluation

A1 – Remain in Special Education Program



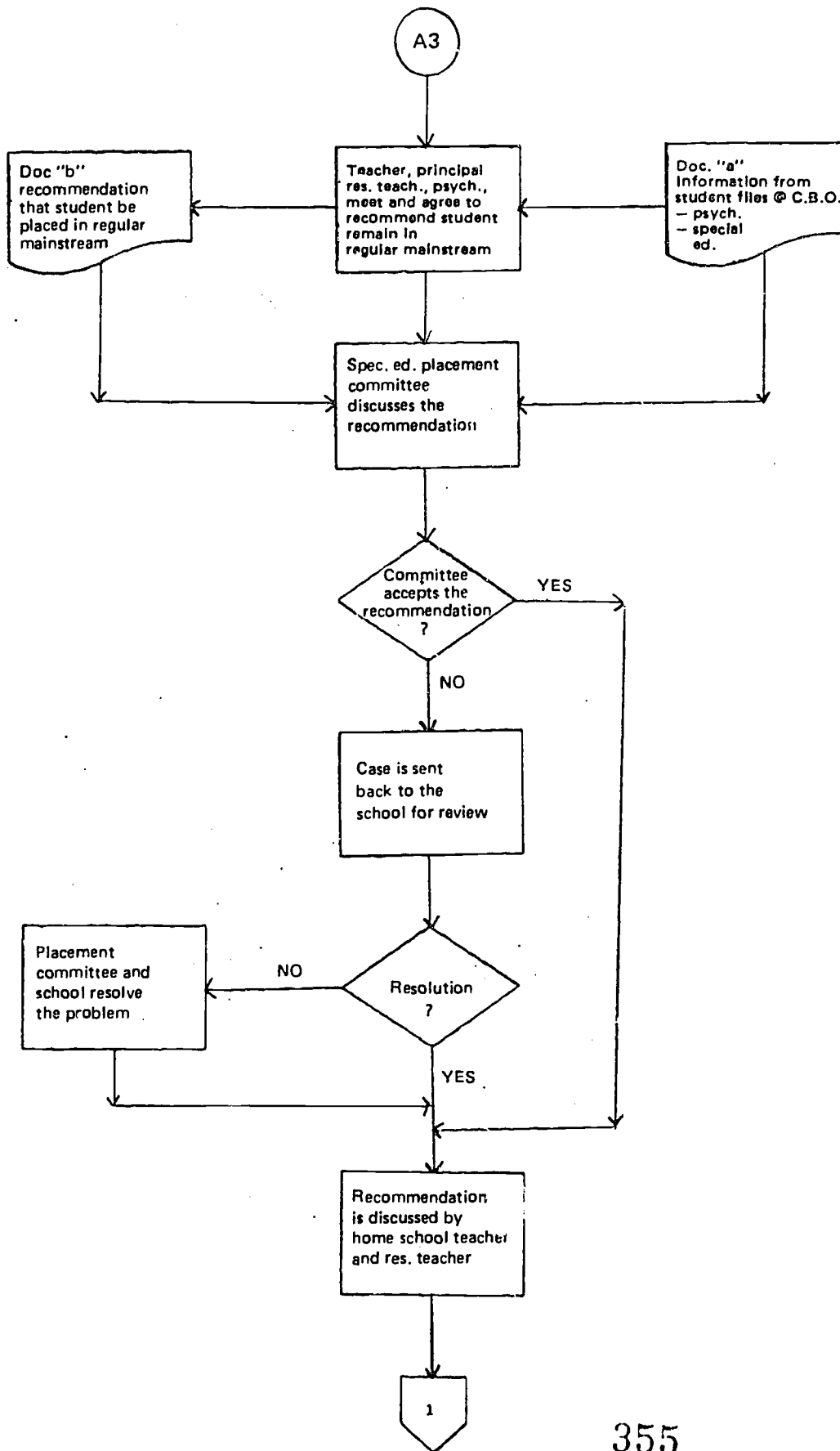
10.1.6.2 SPECIAL STUDENT SERVICES: On-going Evaluation
 A2 – Alternative Special Education Program

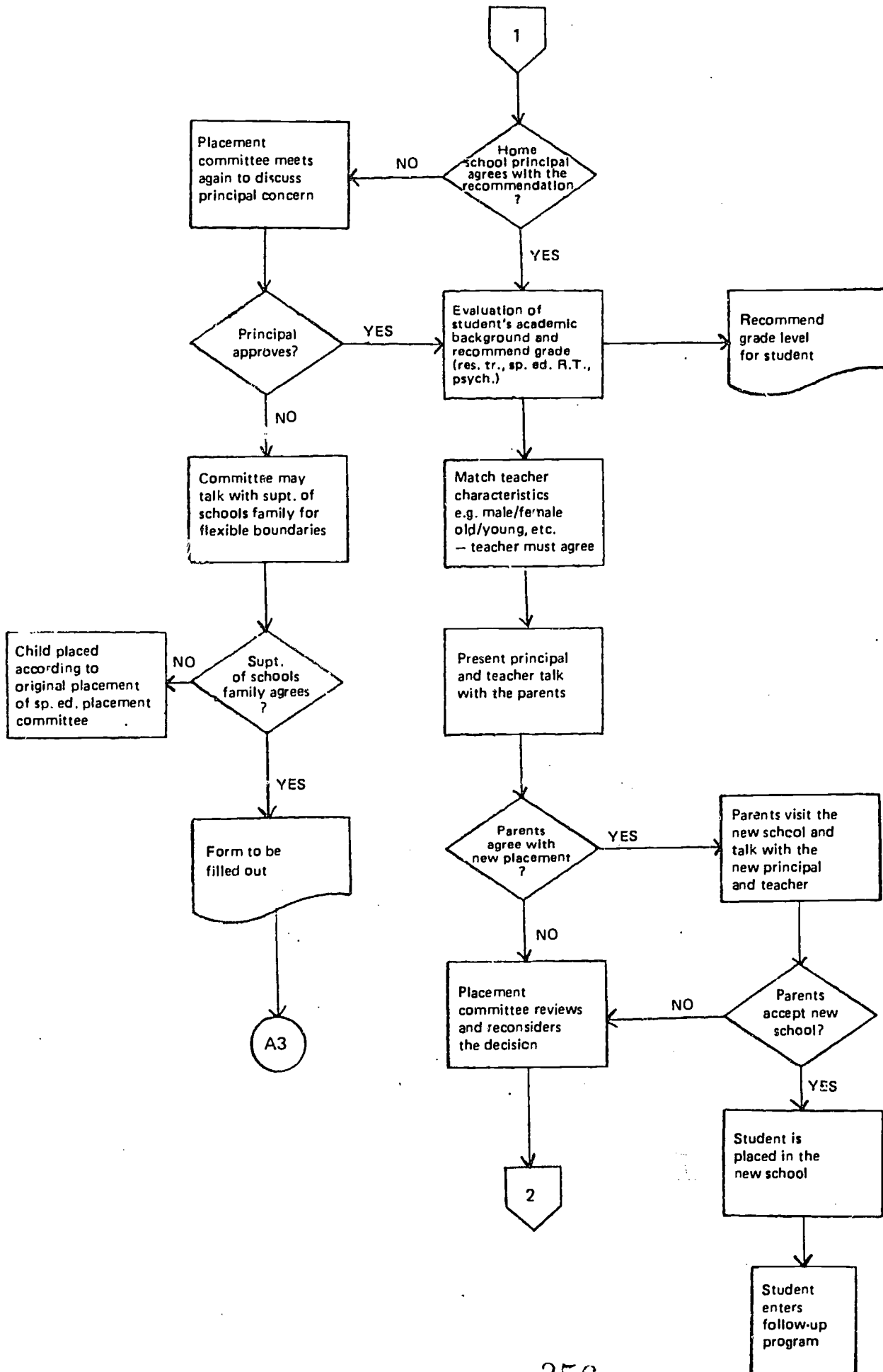


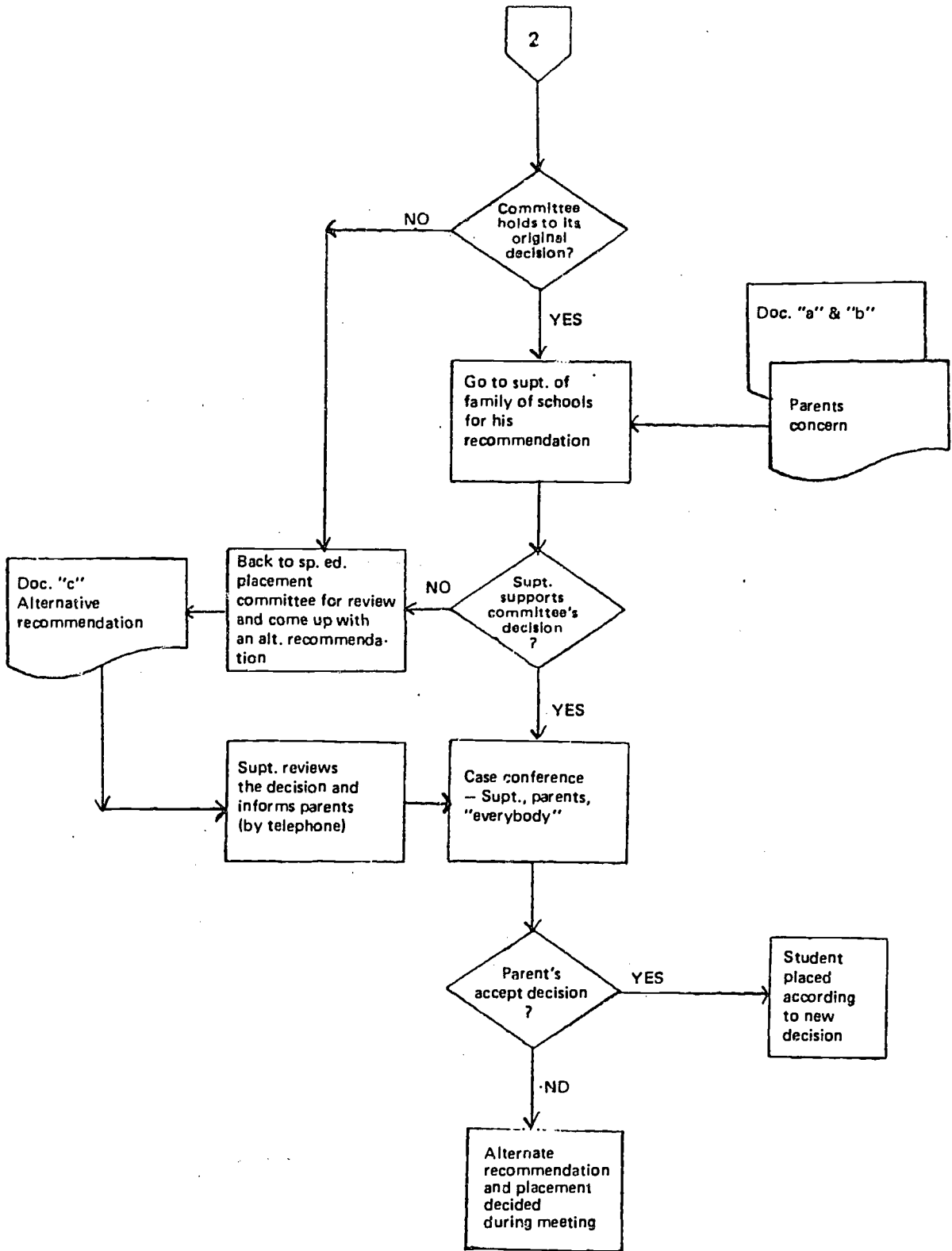


*GLD – General Learning Disability
 SLD – Special Learning Disability

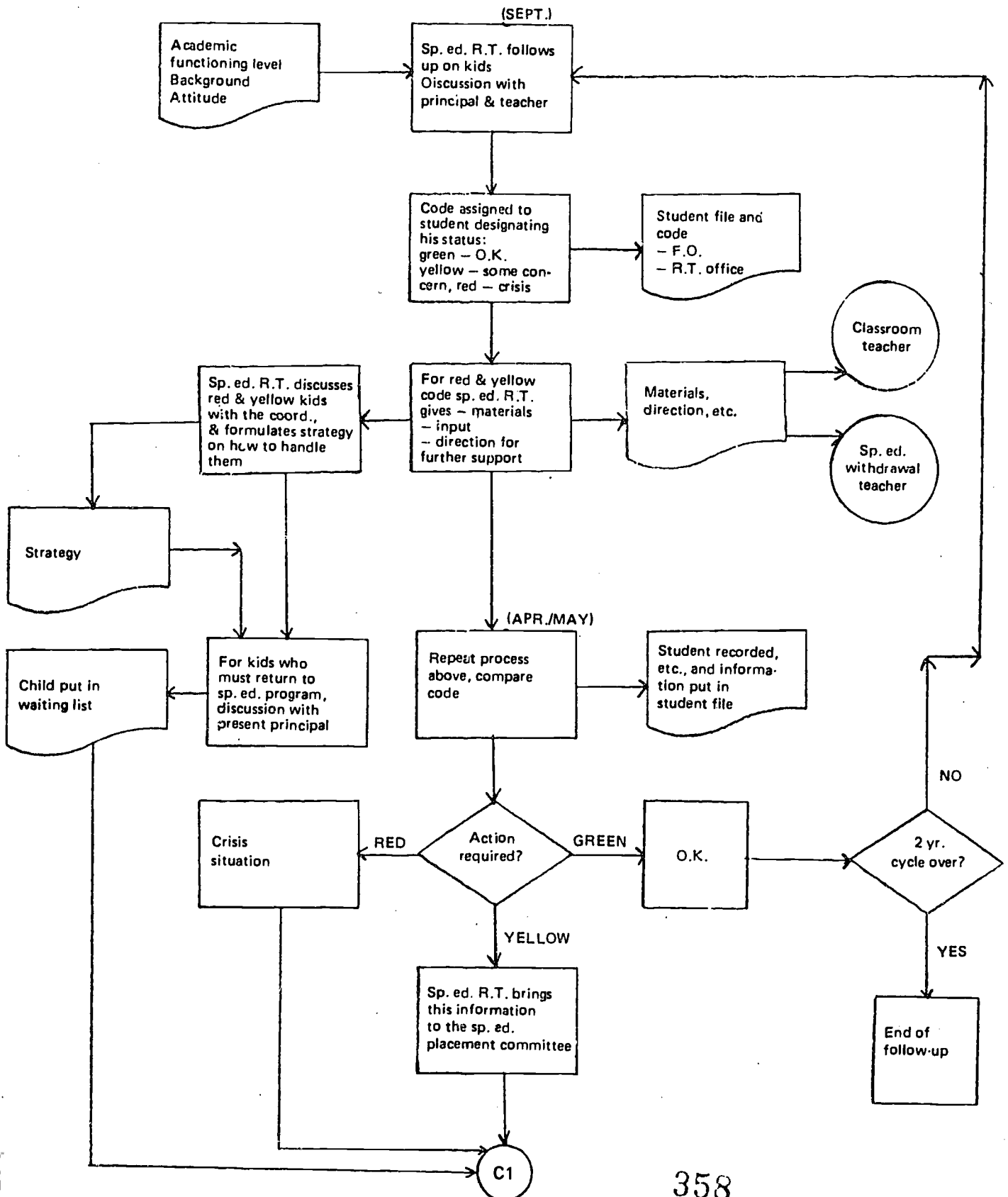
10.1.6.3 SPECIAL STUDENT SERVICES: On-going Evaluation
A3 – Regular Mainstream



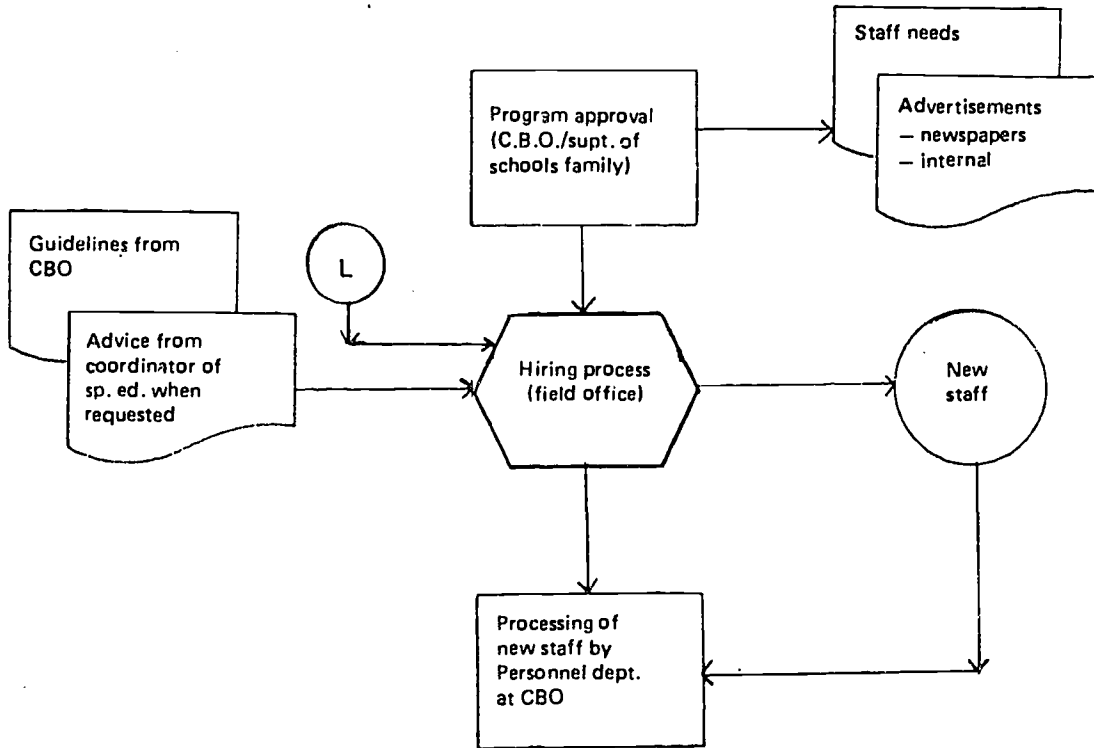




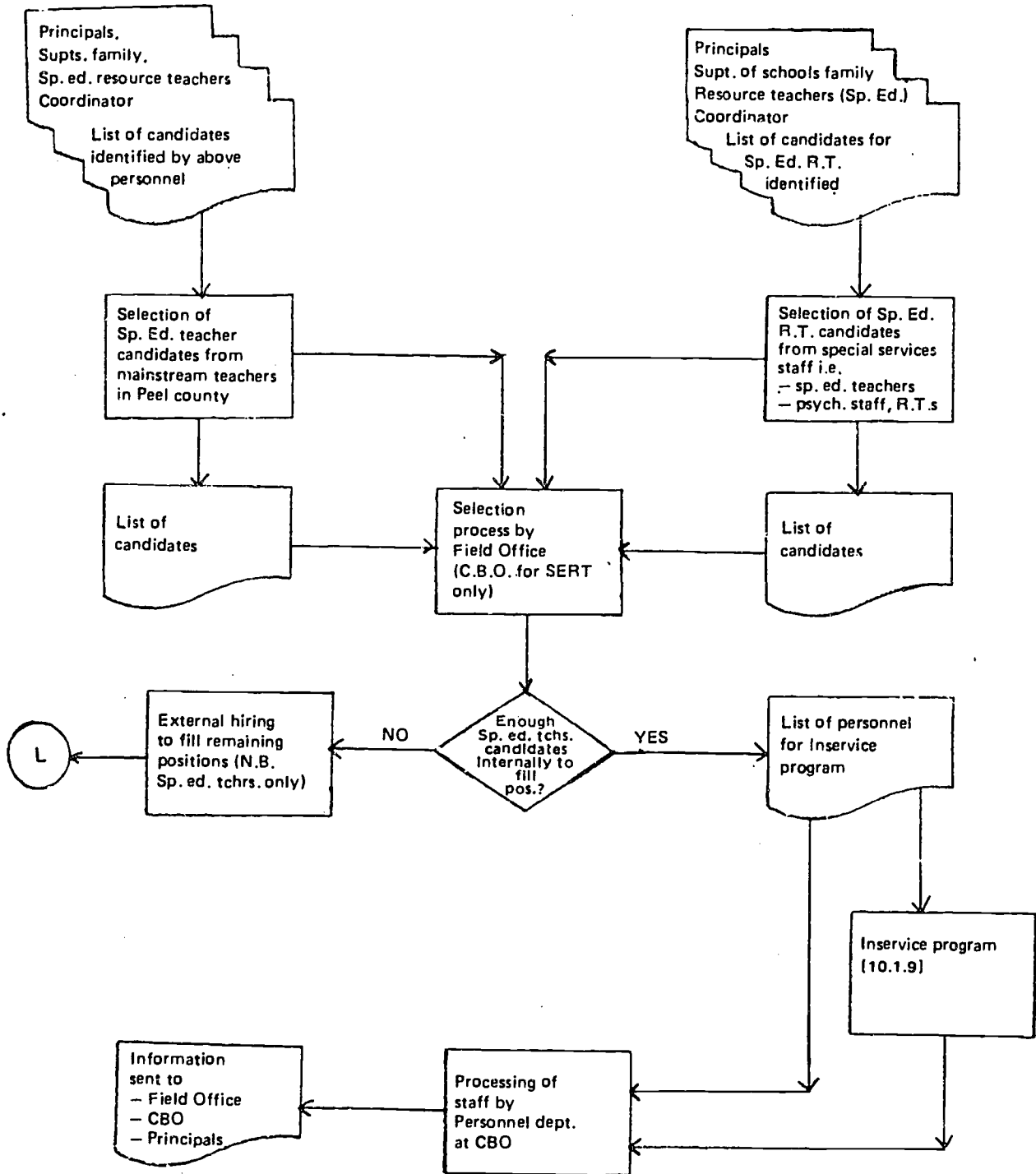
10.1.7 SPECIAL STUDENT SERVICES: Monitoring of Student's Progress after Leaving Special Education Program



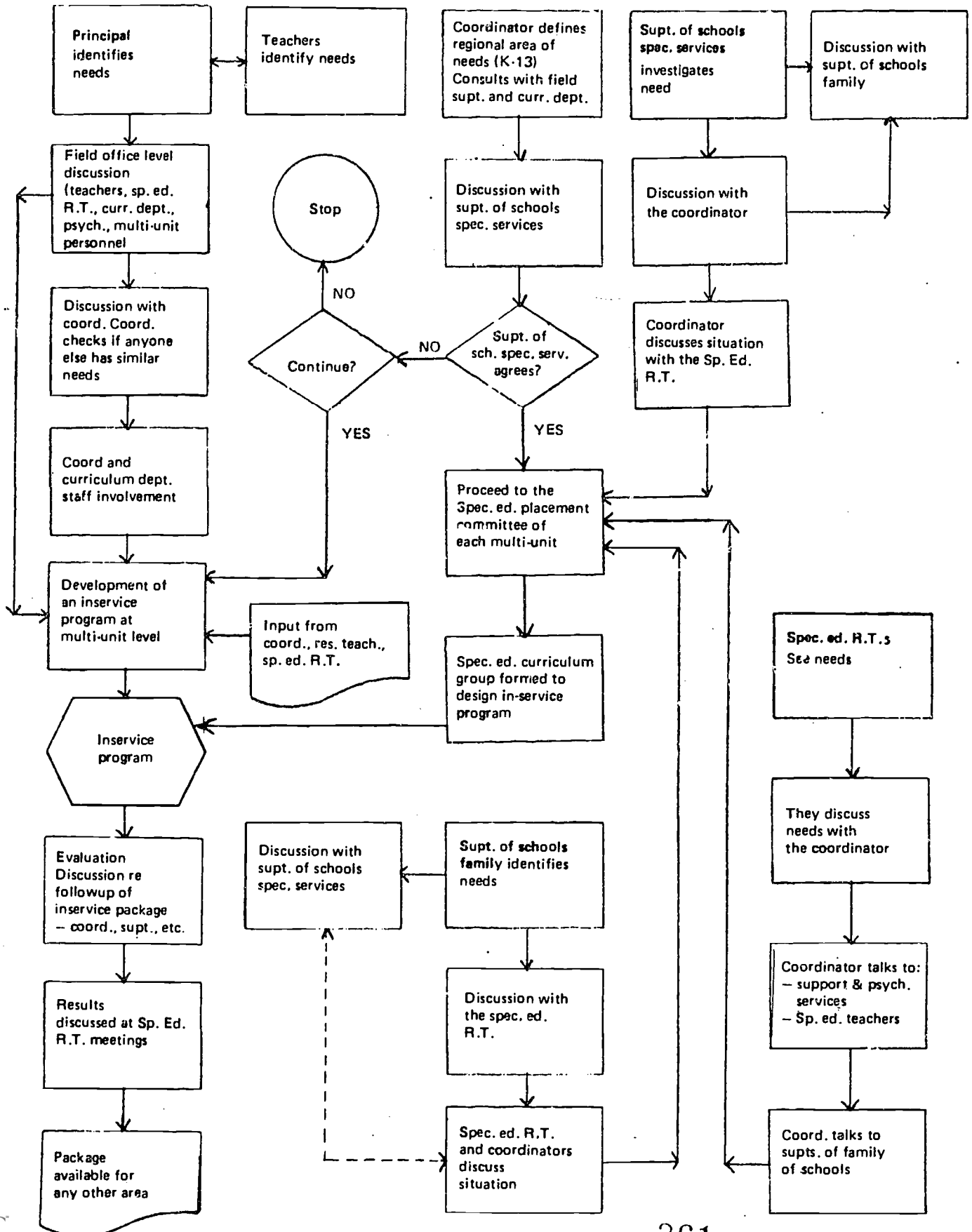
10.1.8.1 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement
1 - External



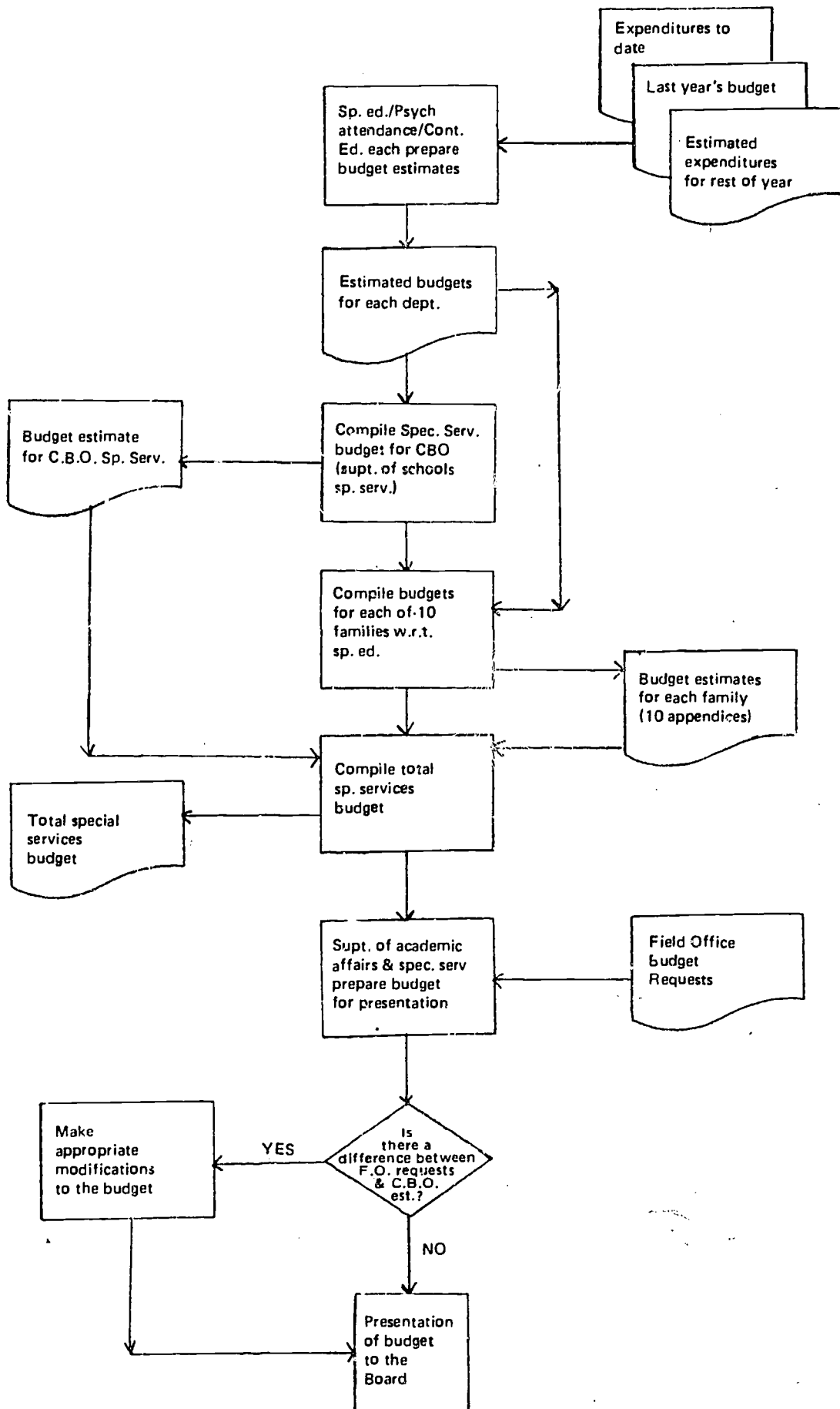
10.1.8.2 SPECIAL STUDENT SERVICES: Staff Recruitment and Placement
2 – Internal



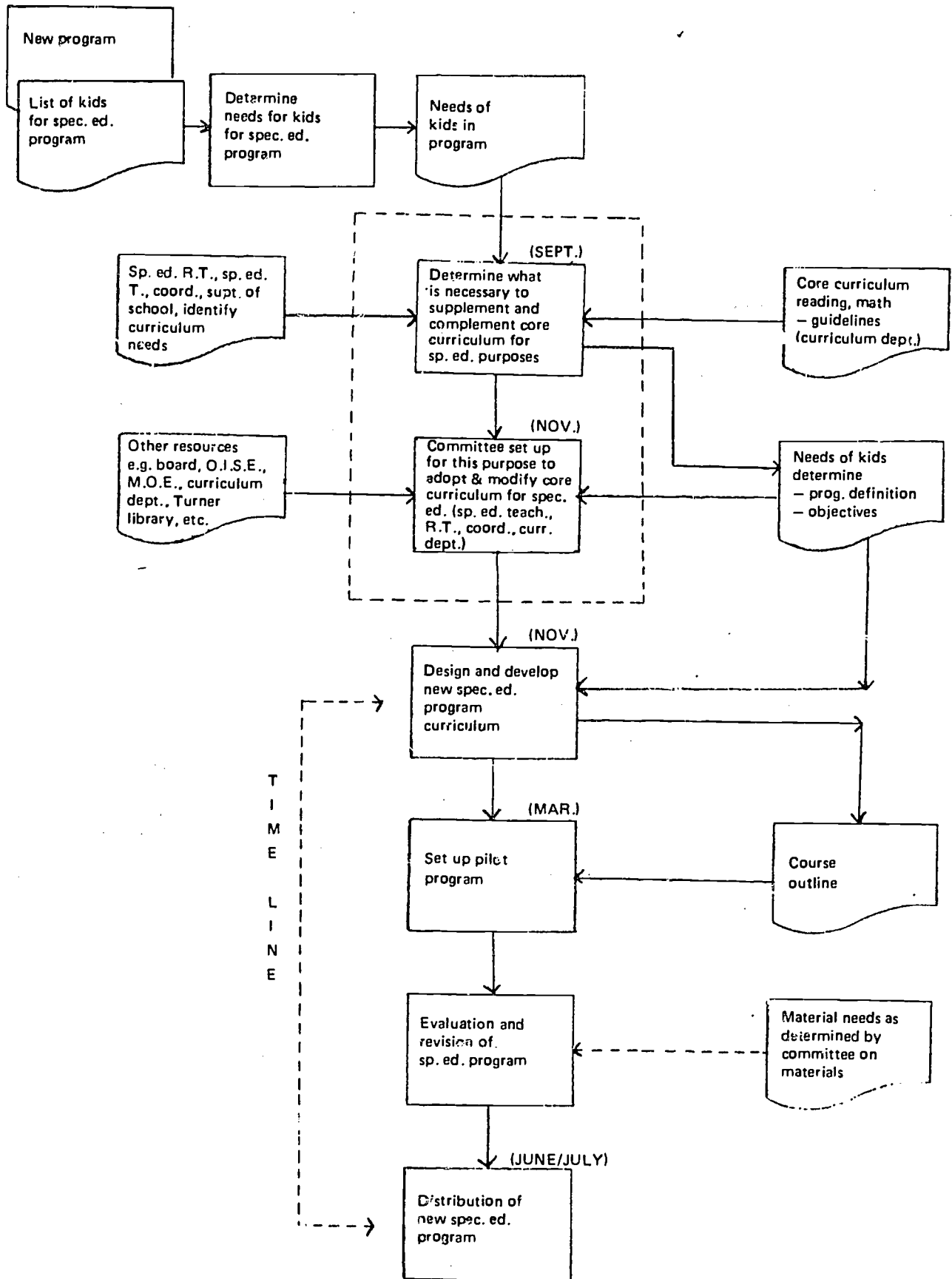
10.1.9 SPECIAL STUDENT SERVICES: Professional Development



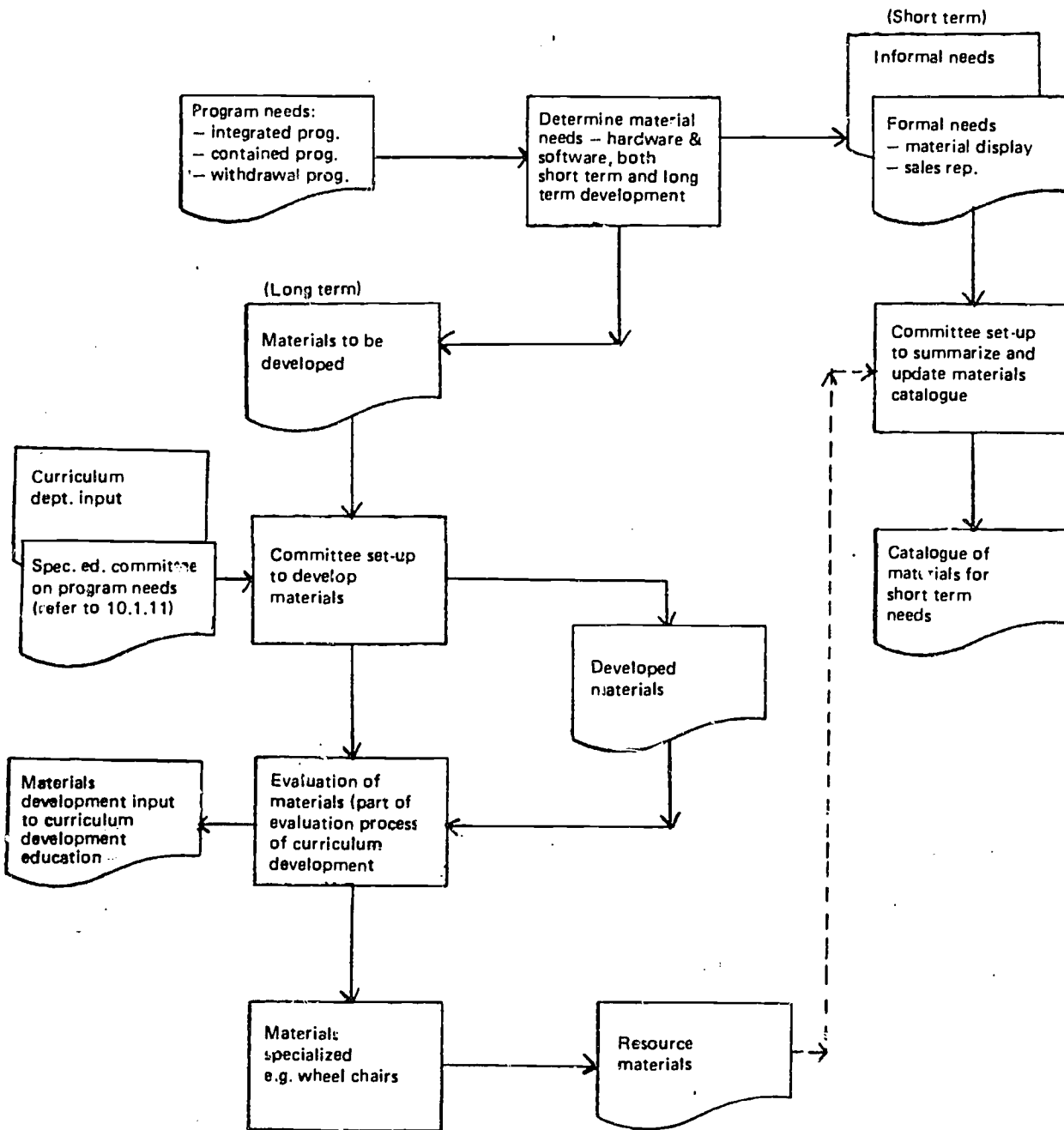
10.1.10 SPECIAL STUDENT SERVICES: Budget



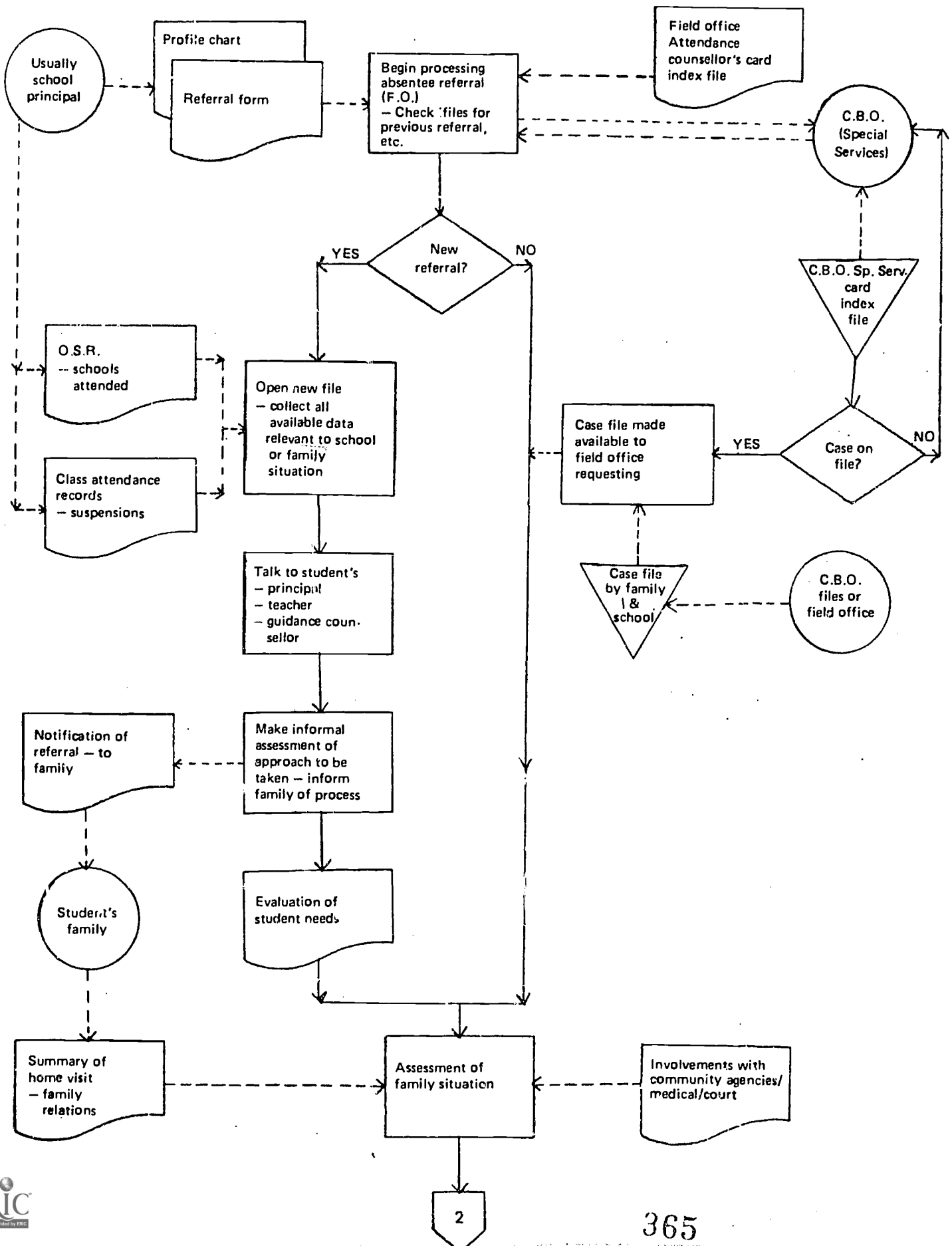
10.1.11 SPECIAL STUDENT SERVICES: Curriculum Development

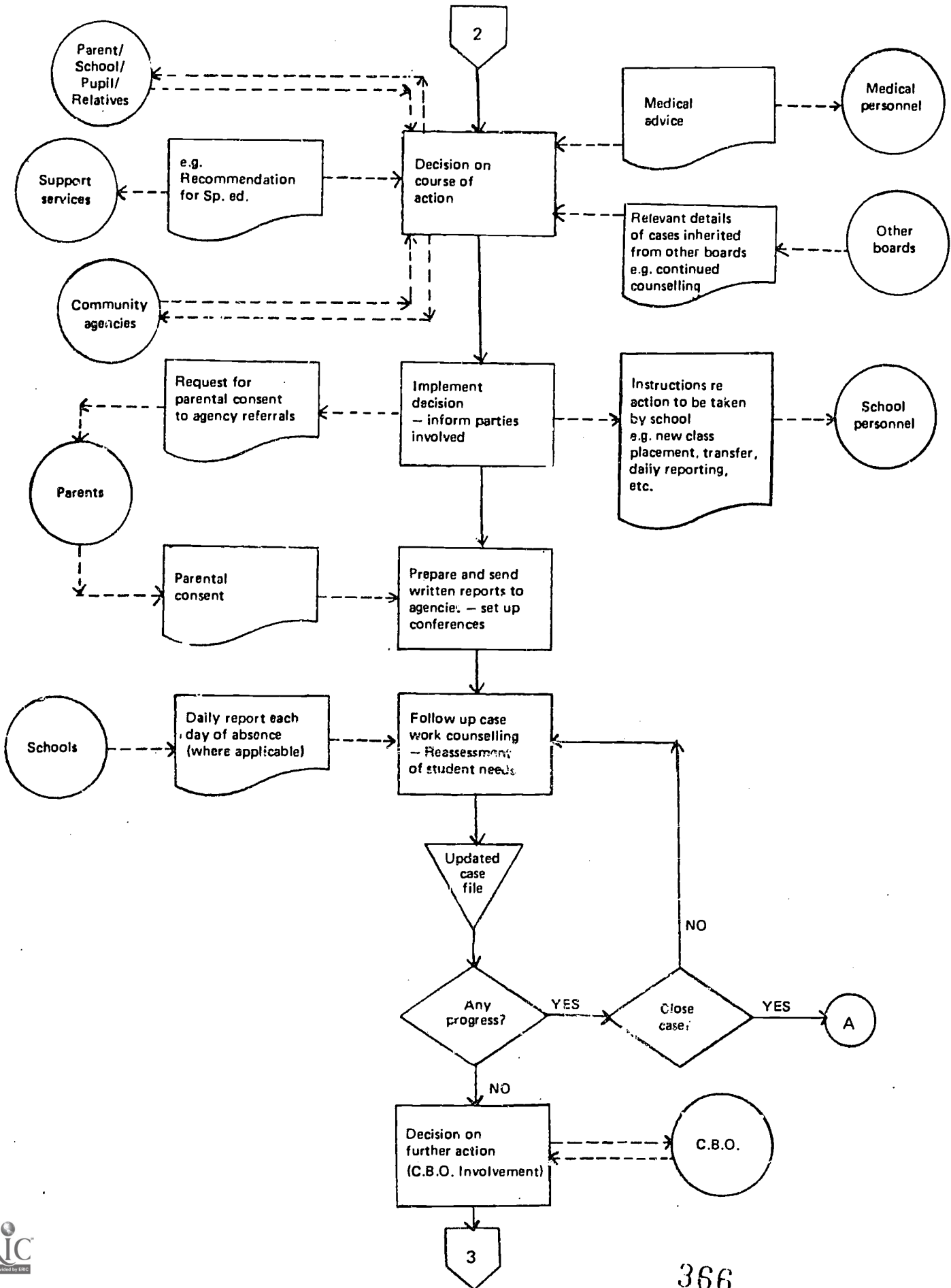


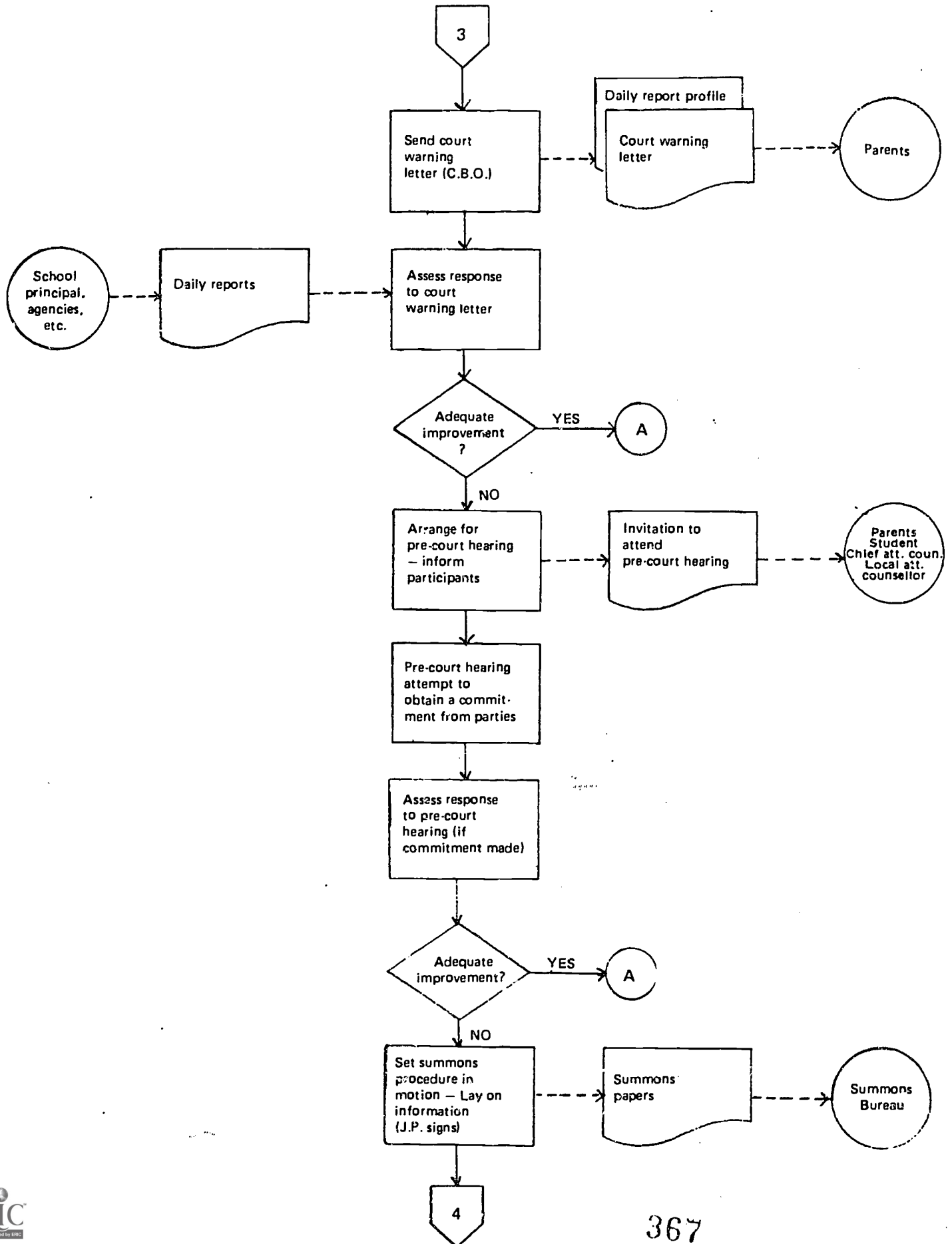
10.1.12 SPECIAL STUDENT SERVICES: Material Development

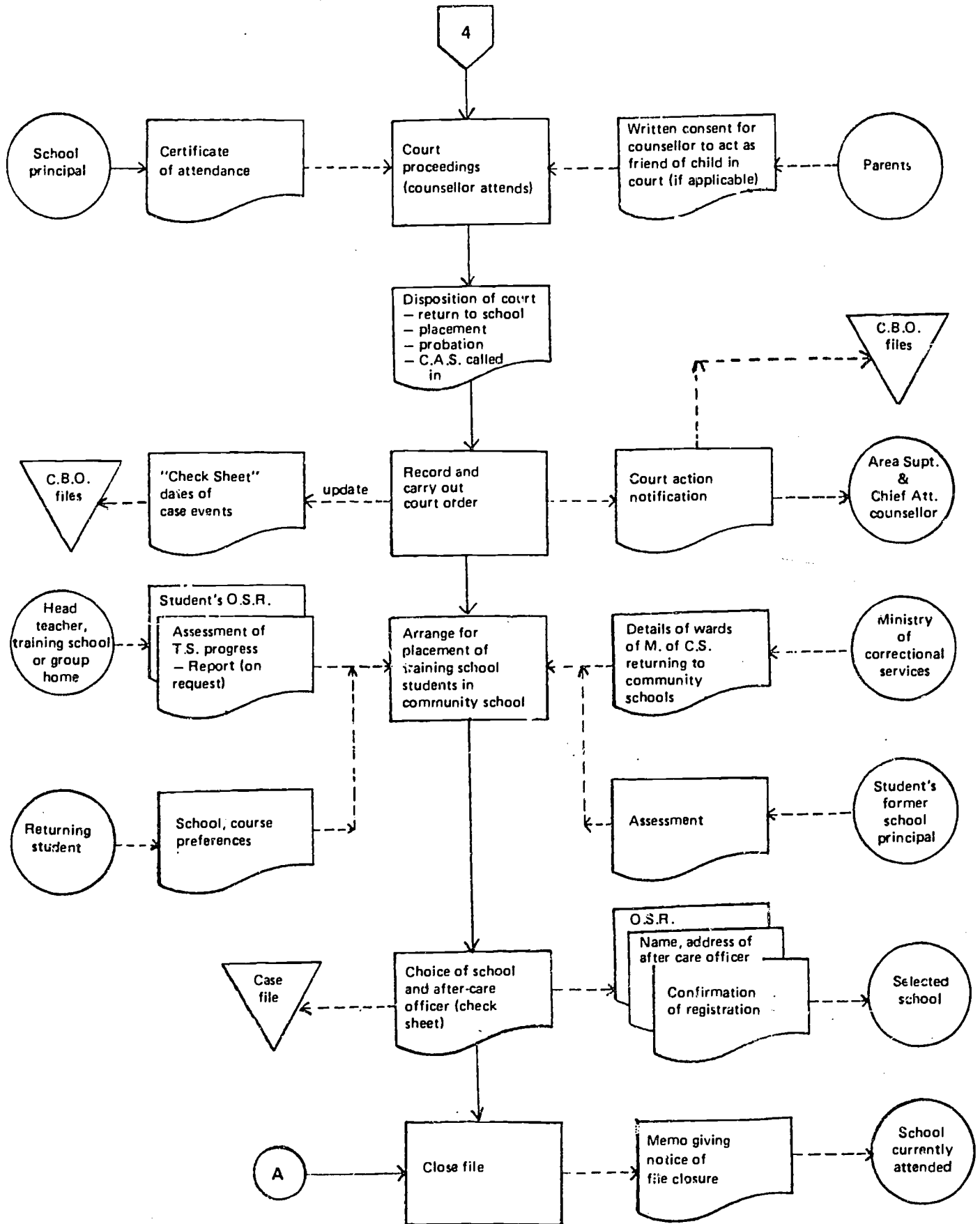


10.2.1.1 SPECIAL STUDENT SERVICES: Attendance – Casework

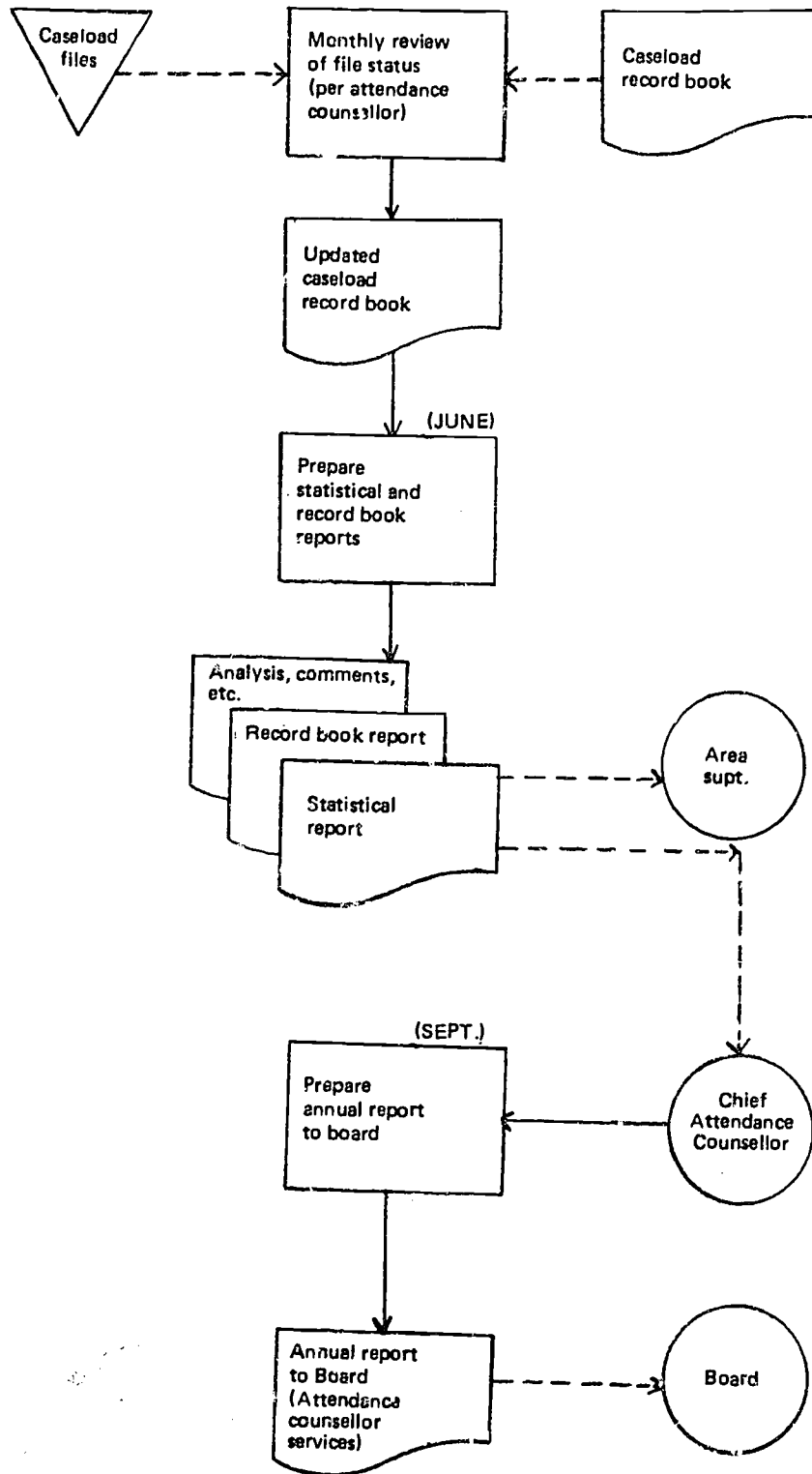




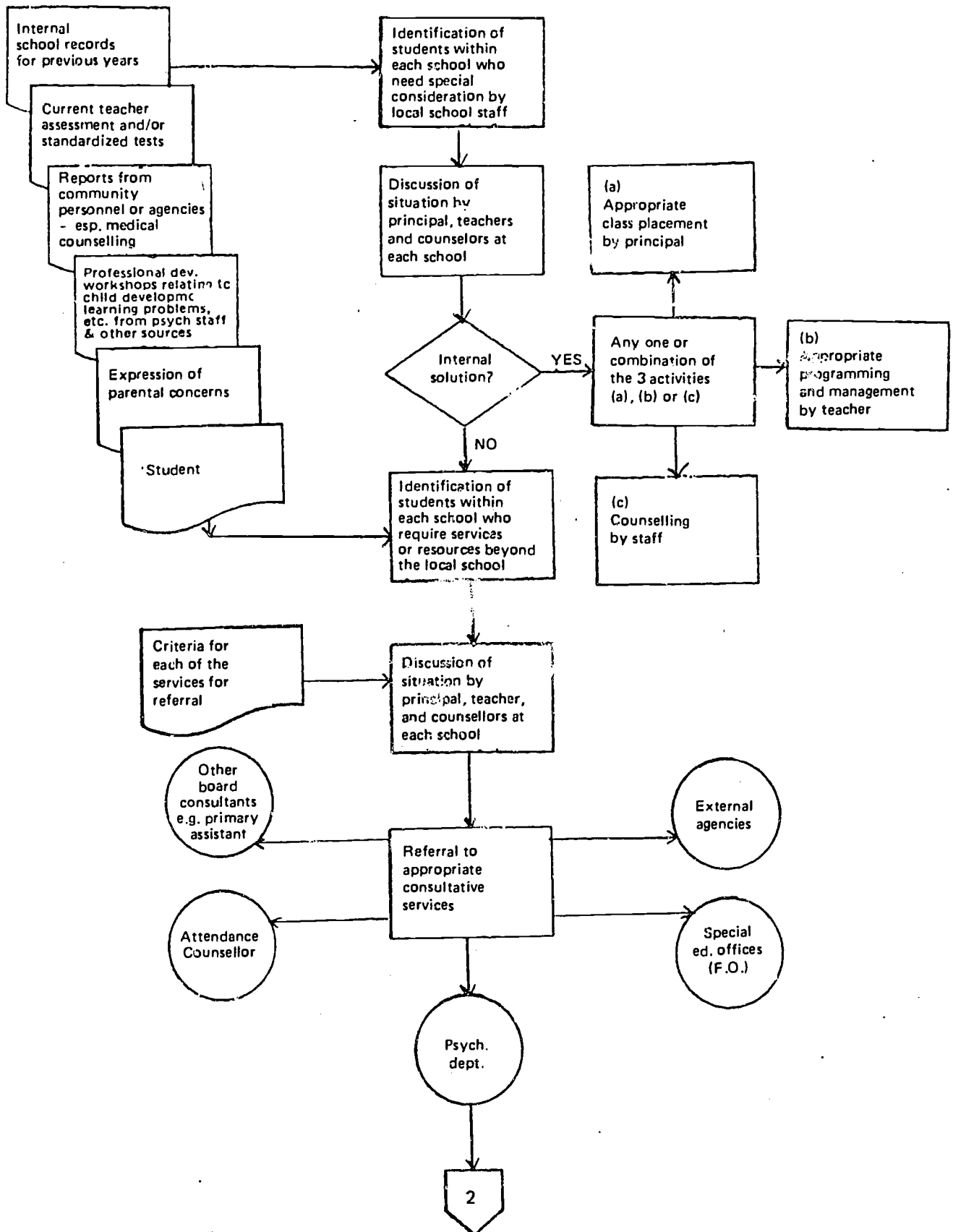


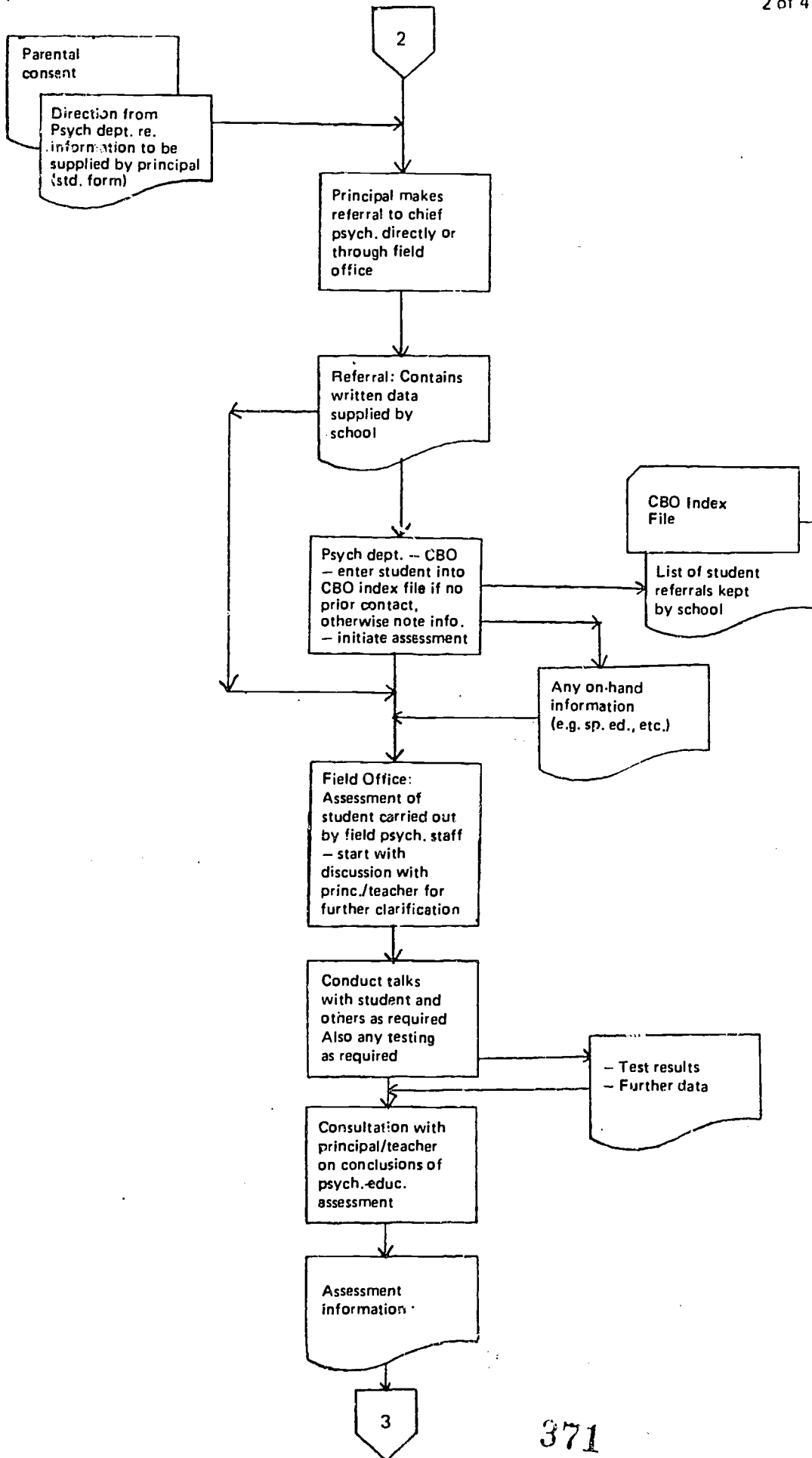


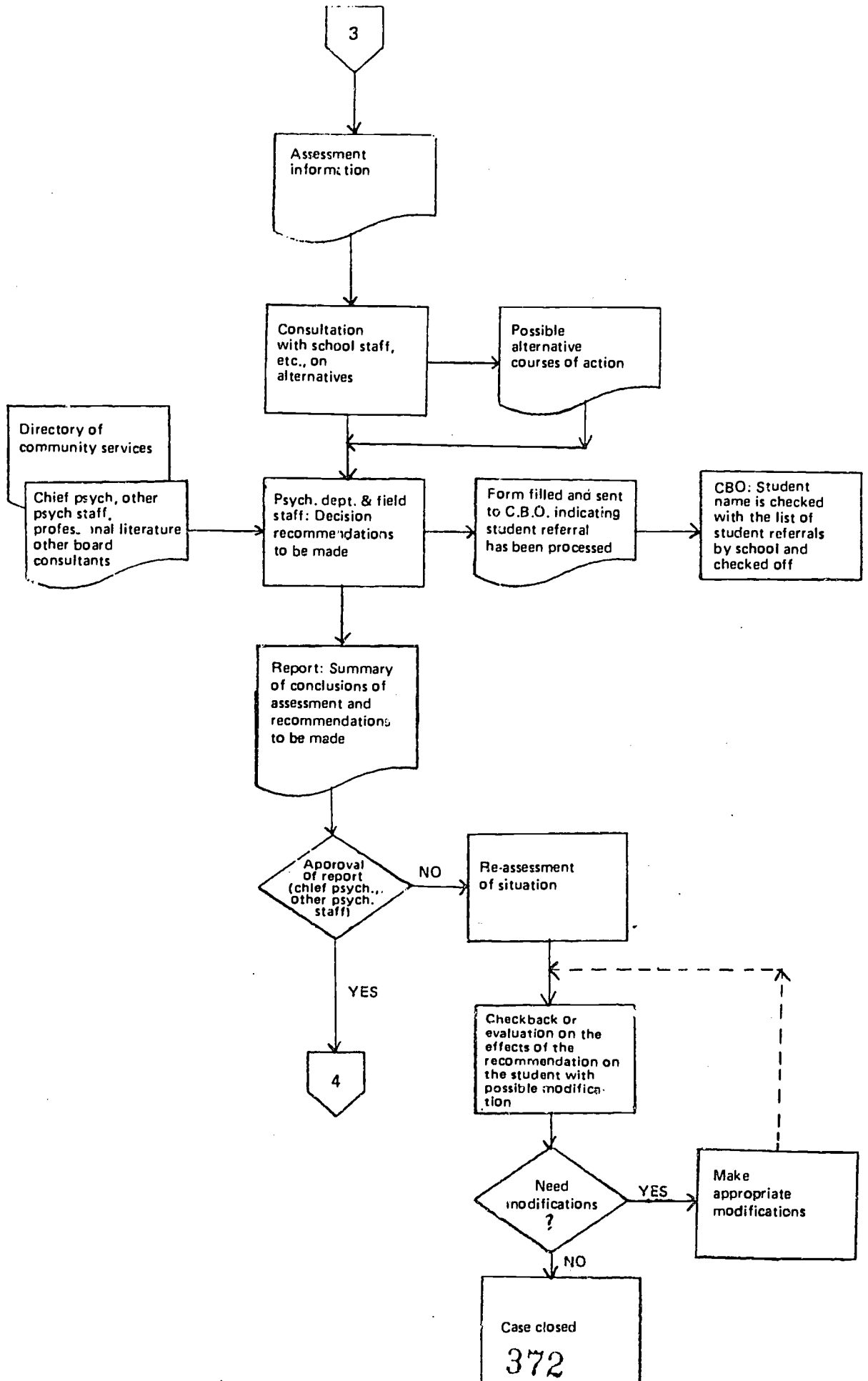
10.2.4 SPECIAL STUDENT SERVICES: Attendance – Reporting

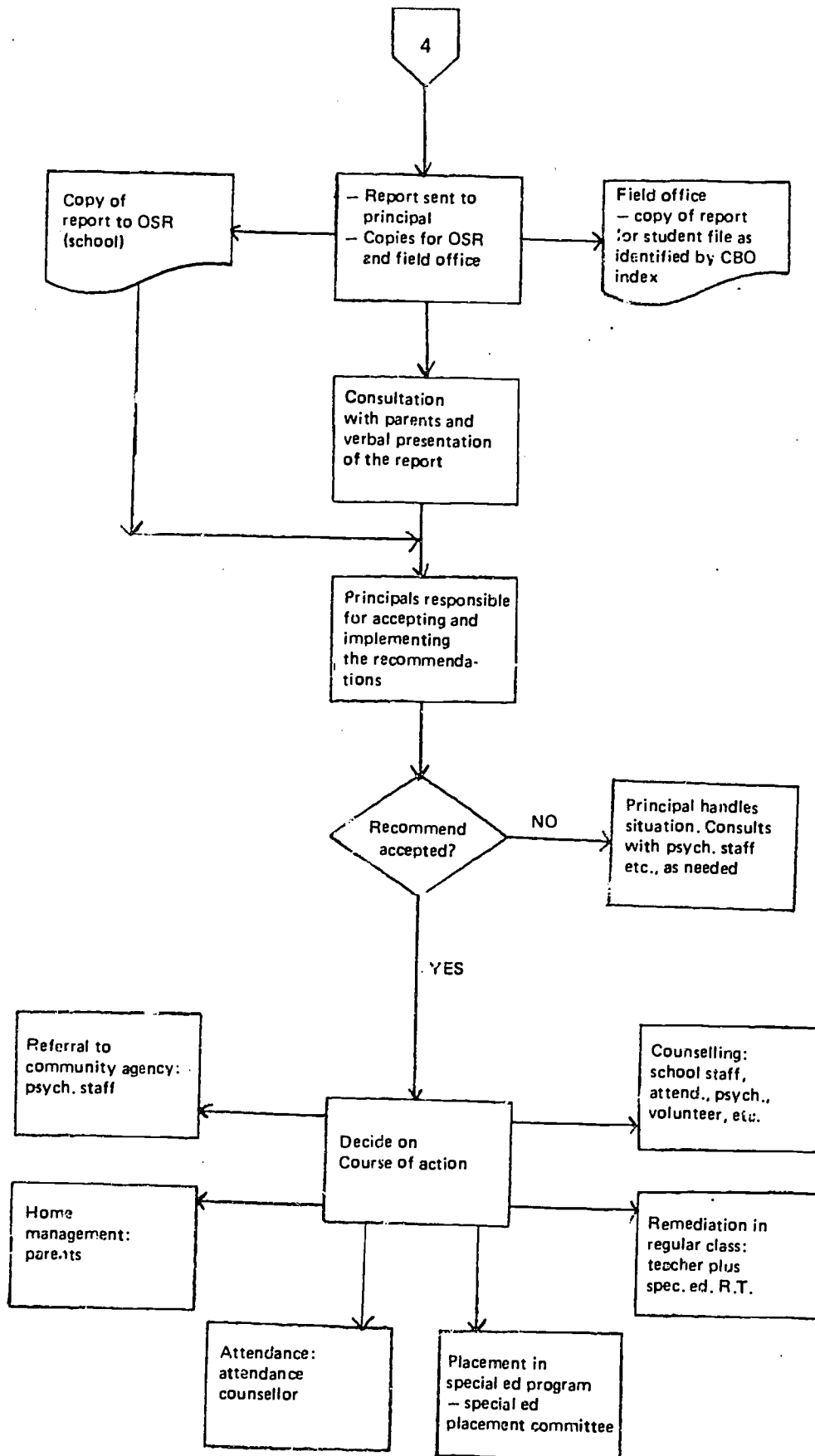


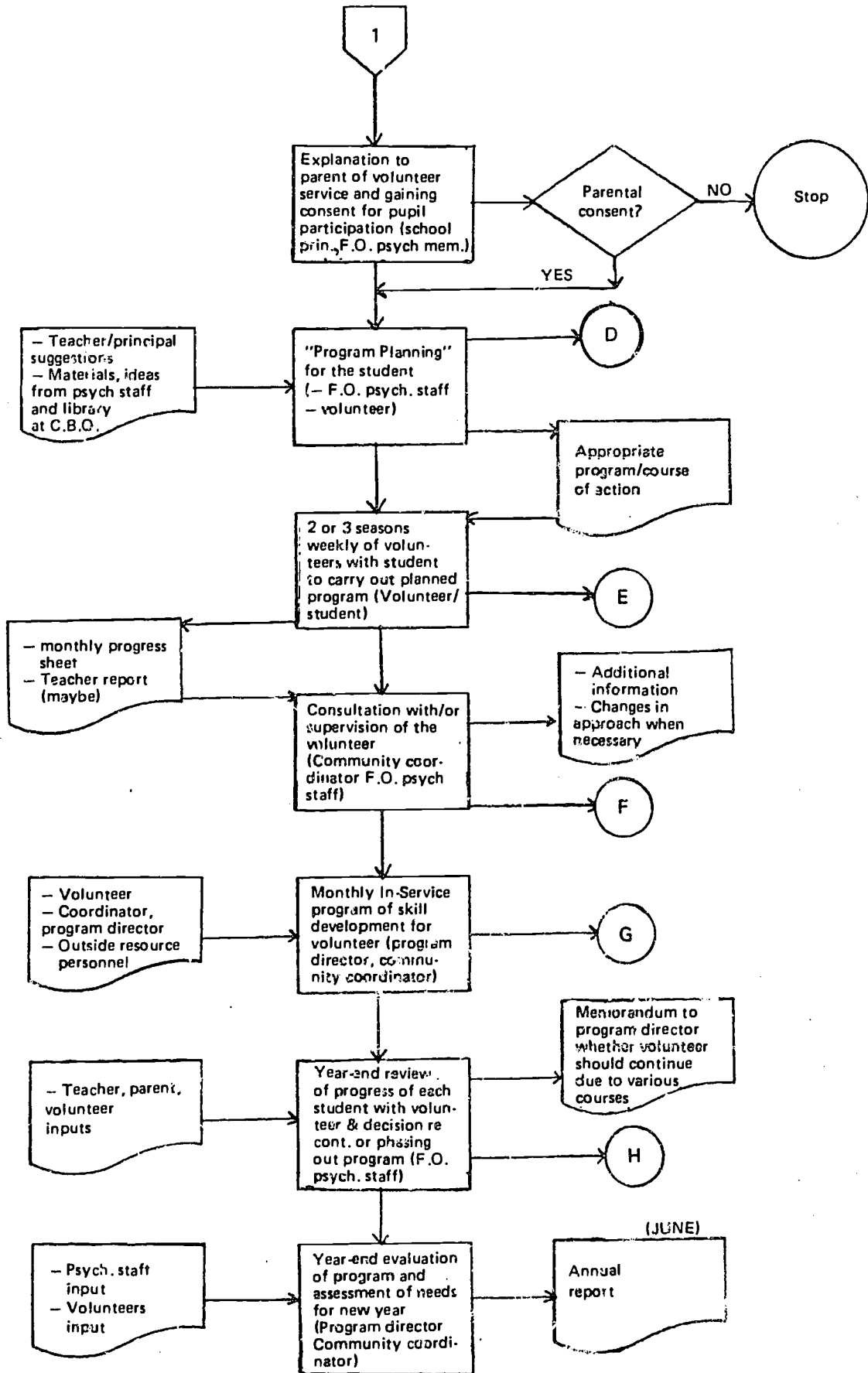
10.3.1 SPECIAL STUDENT SERVICES: Psychology Dept. – Psycho-Educational Diagnostic and Programming Services



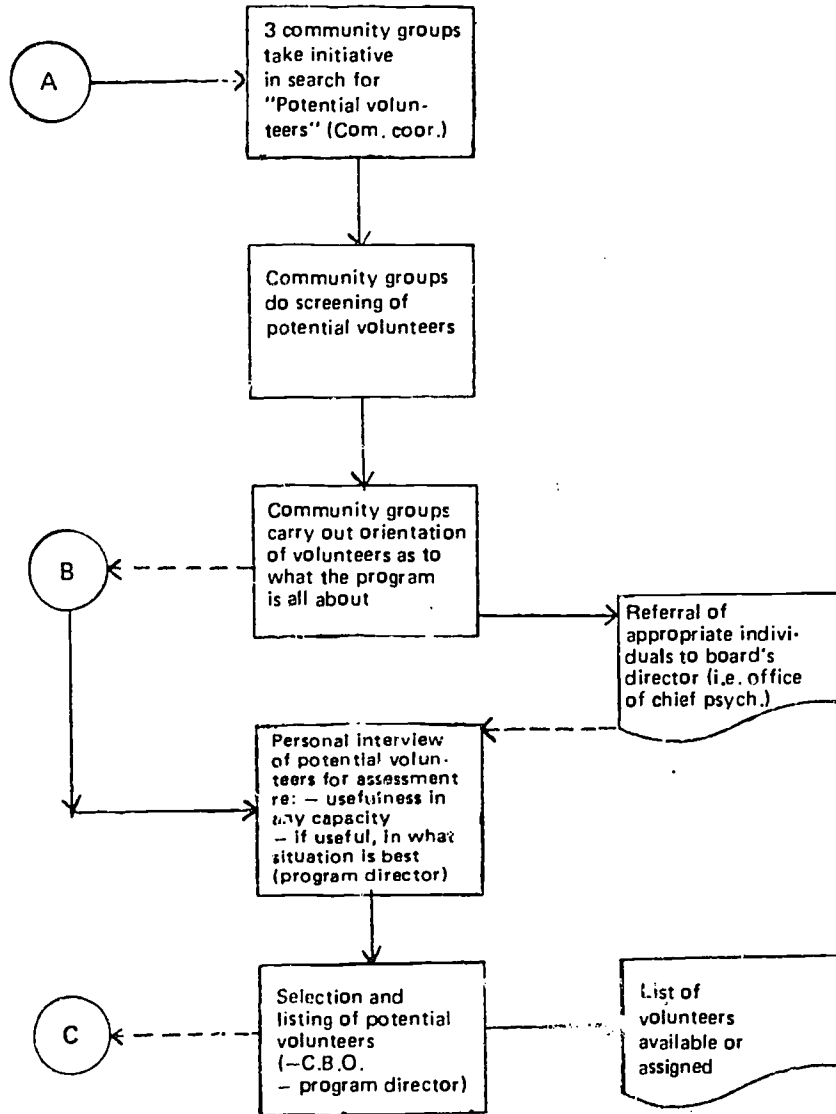






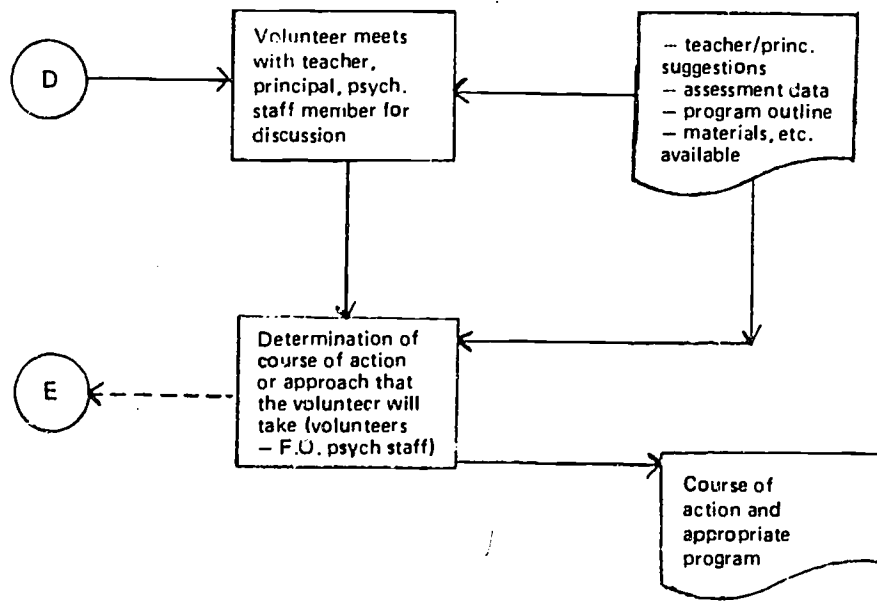


10 .2.2 SPECIAL STUDENT SERVICES: Psychology Dept. – One with One" Volunteer Program
 (Search, Screening and Final Selection of Volunteers)

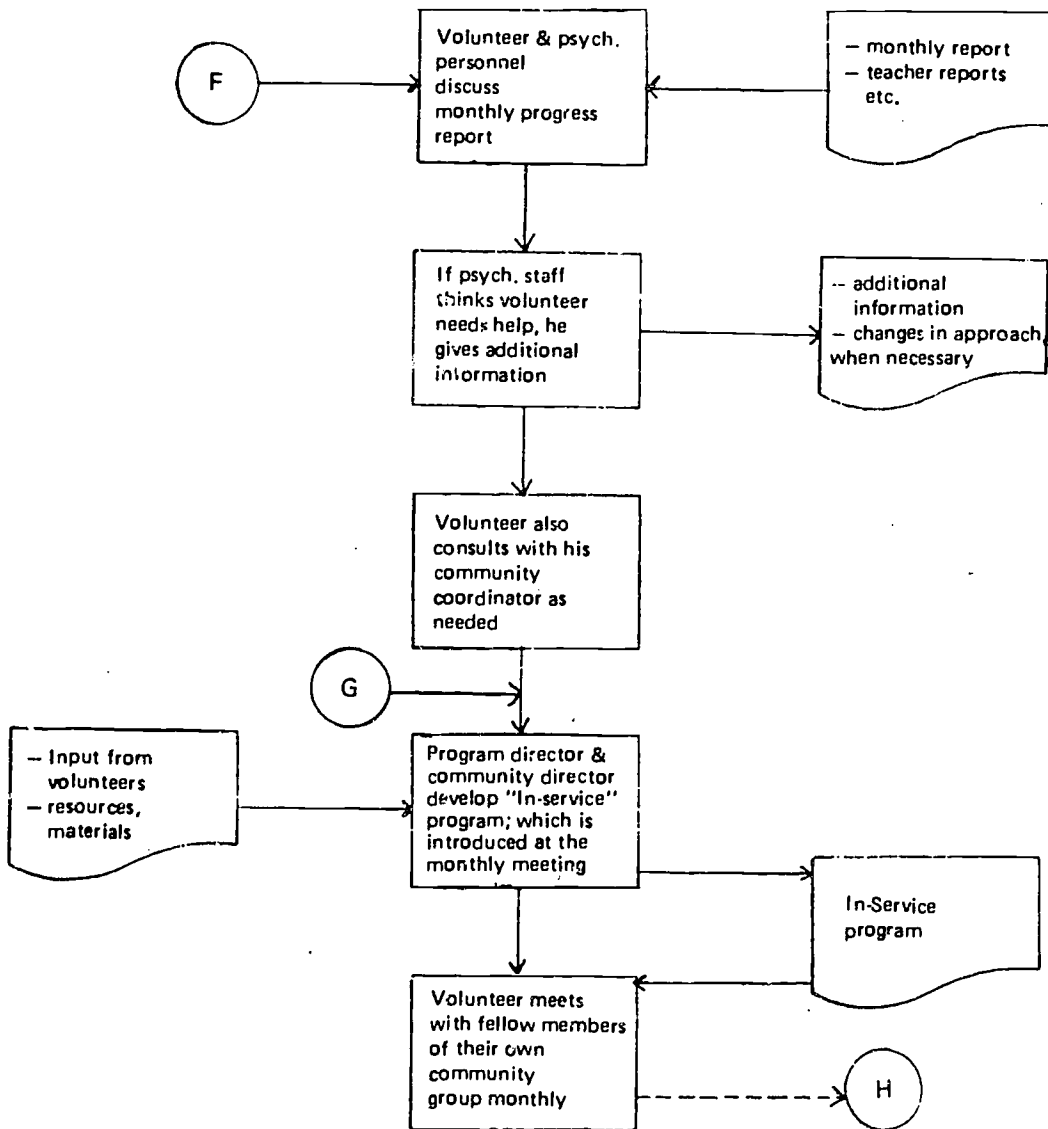


10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program
(Program Planning for the Student)

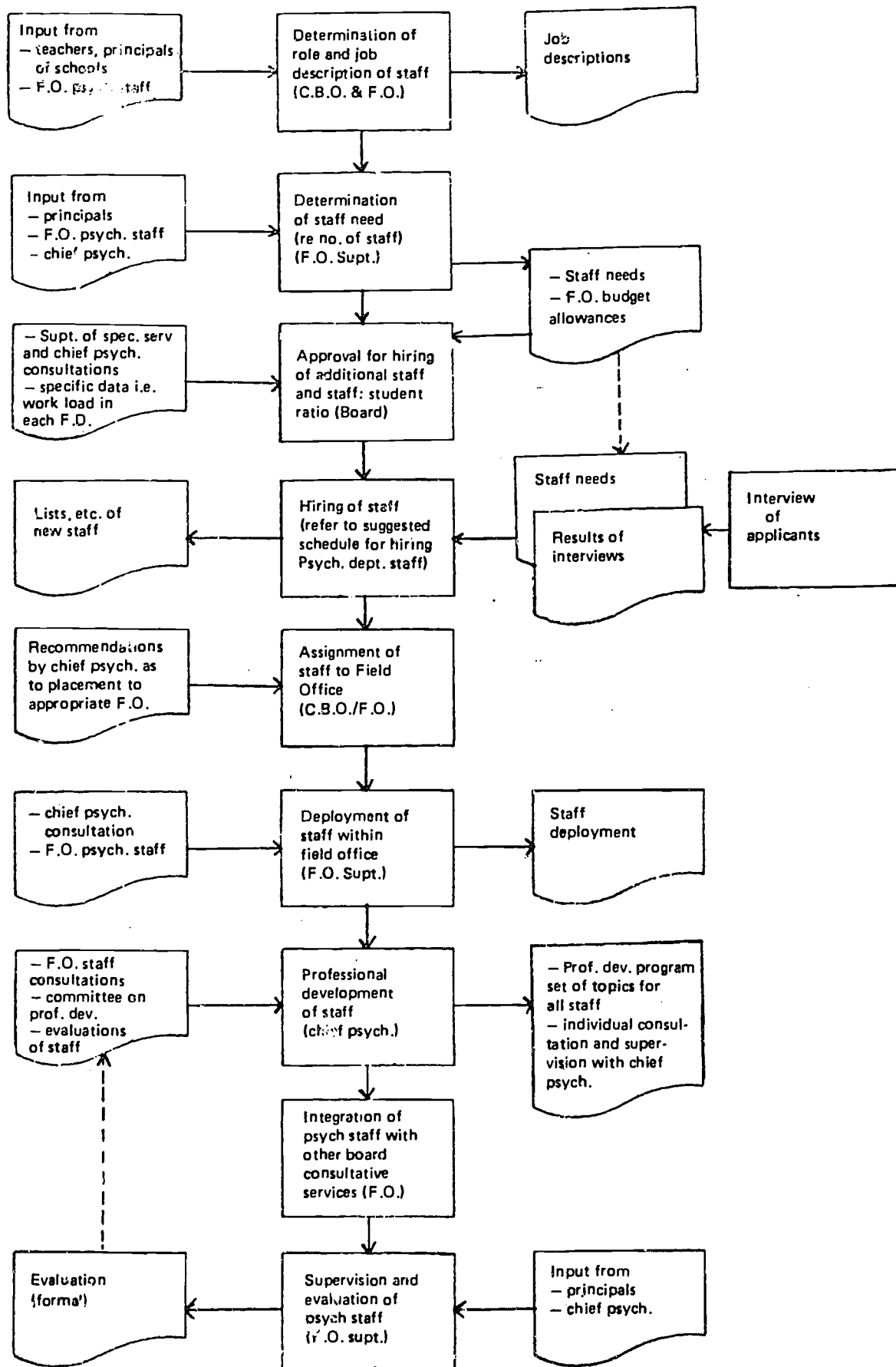
(1 of 2)



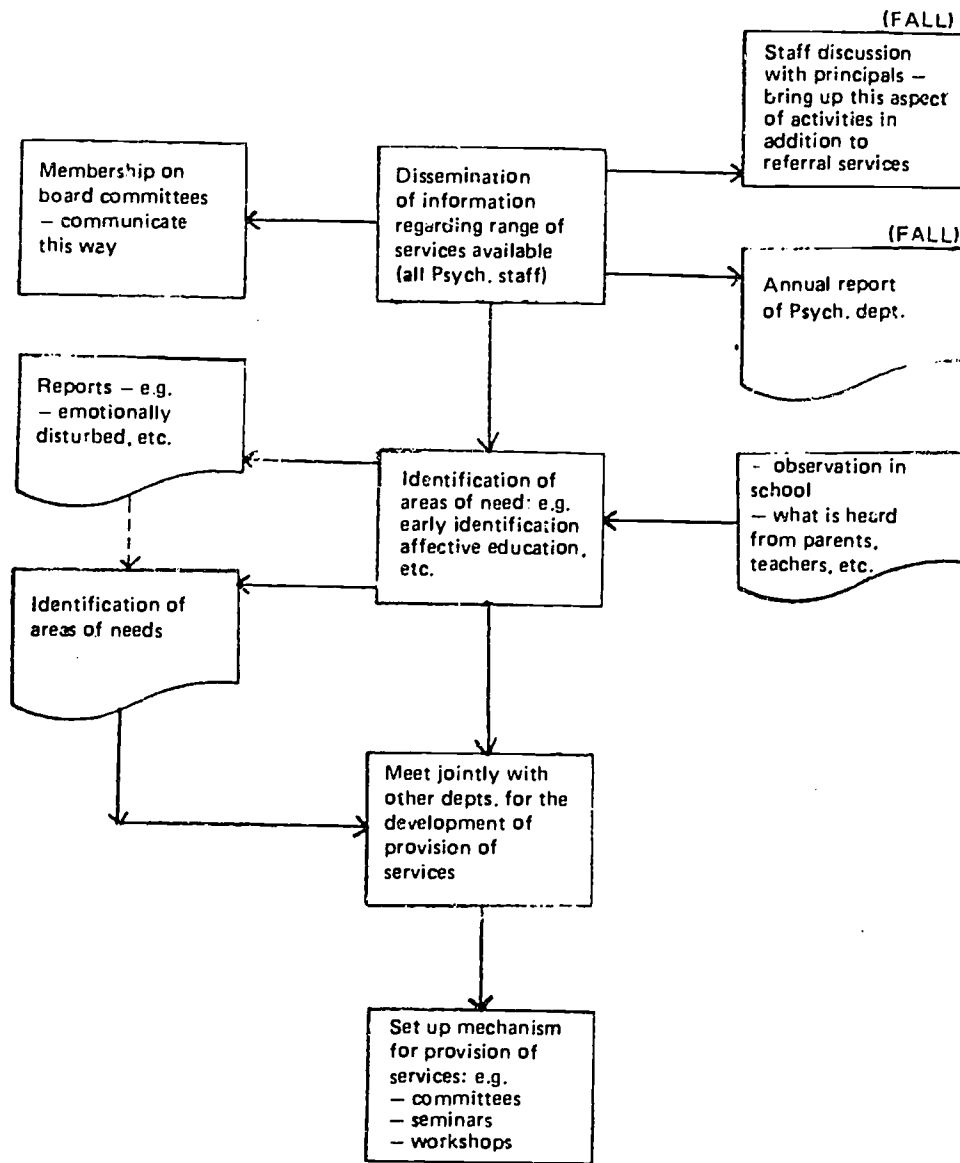
10.3.2.3 SPECIAL STUDENT SERVICES: Psychology Dept. "One with One" Volunteer Program



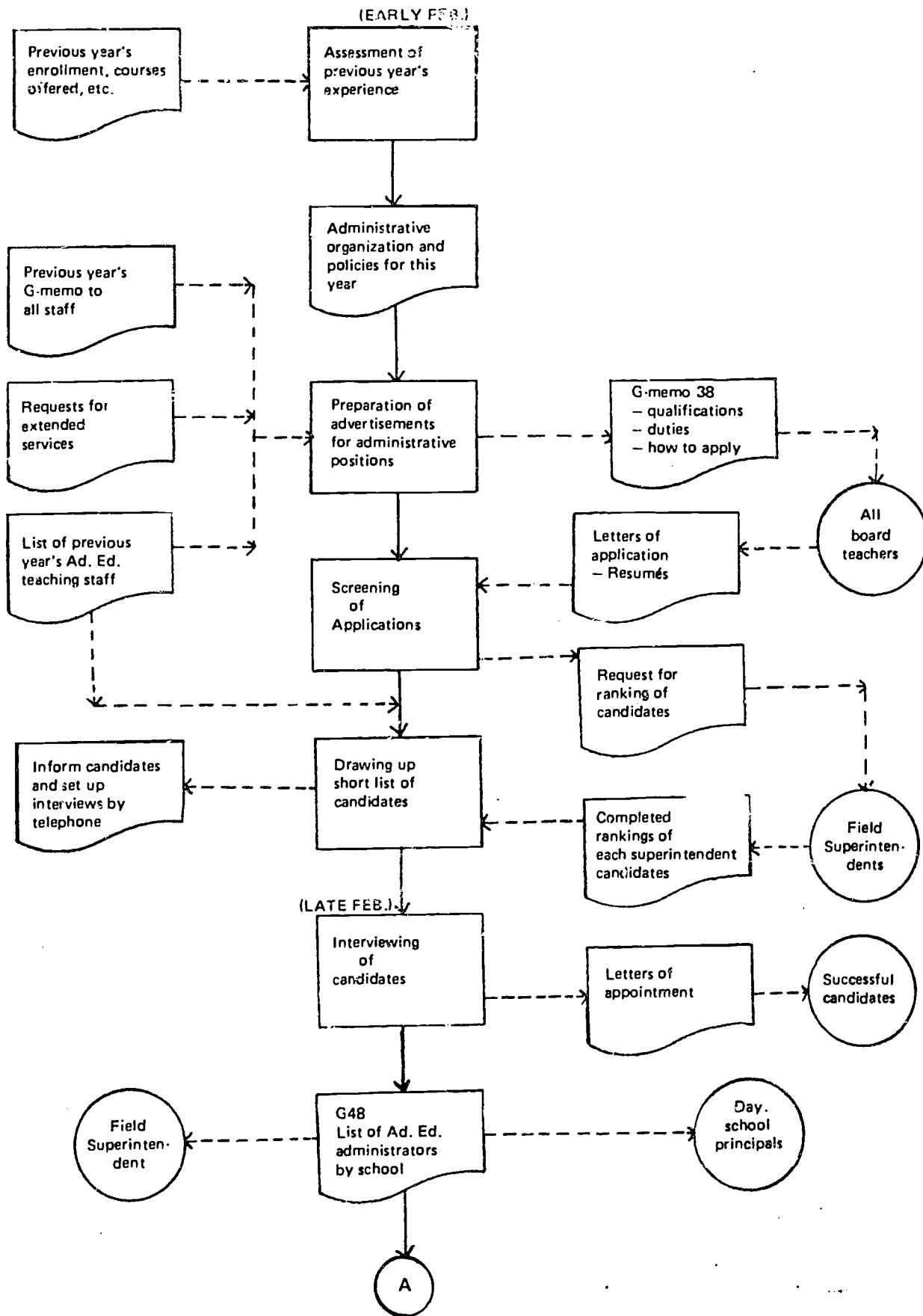
10.3.3 SPECIAL STUDENT SERVICES: Psychology Dept. - Administration



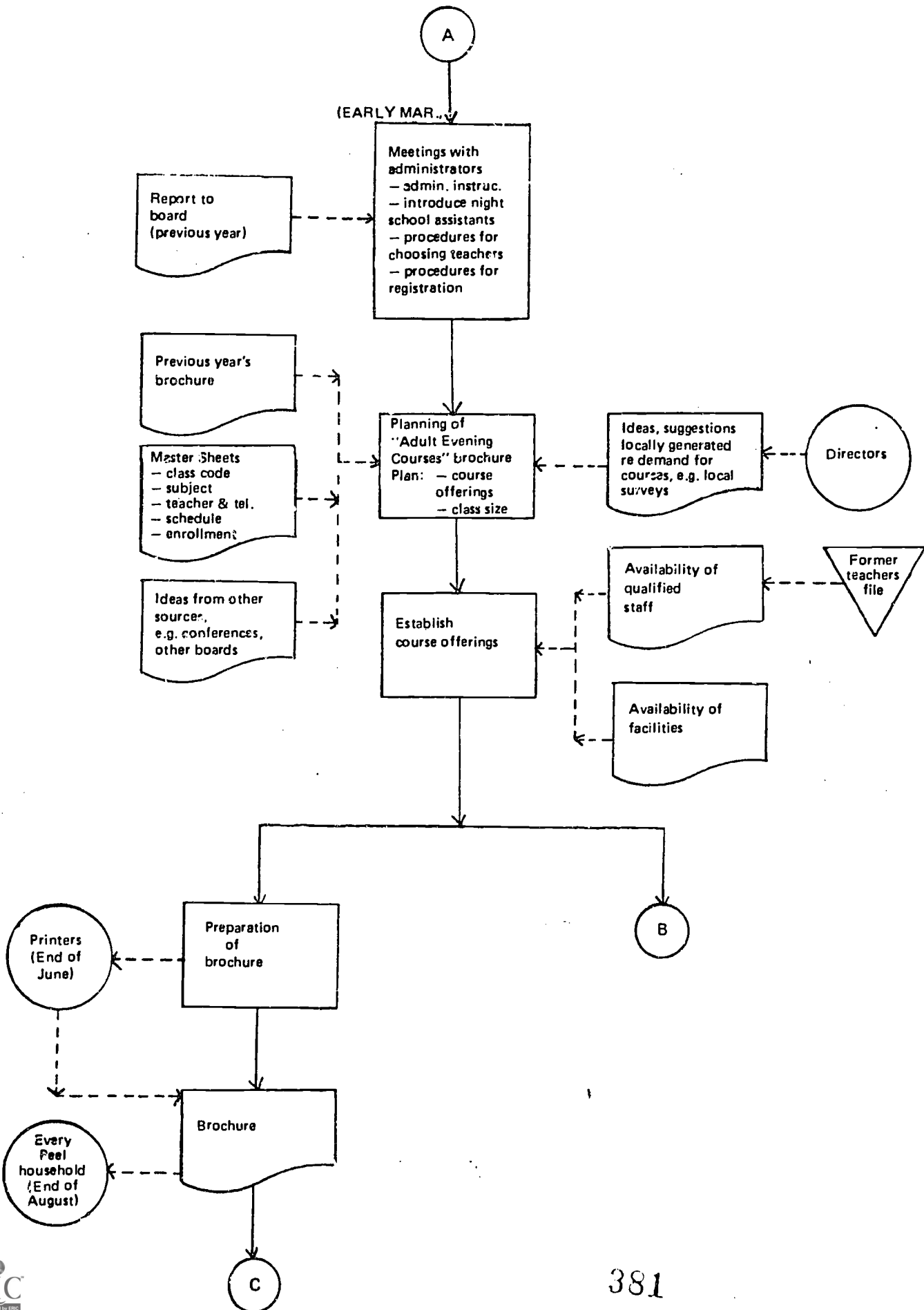
10.3.4 SPECIAL STUDENT SERVICES: Psychology Dept. – General Resource and Consultative Services



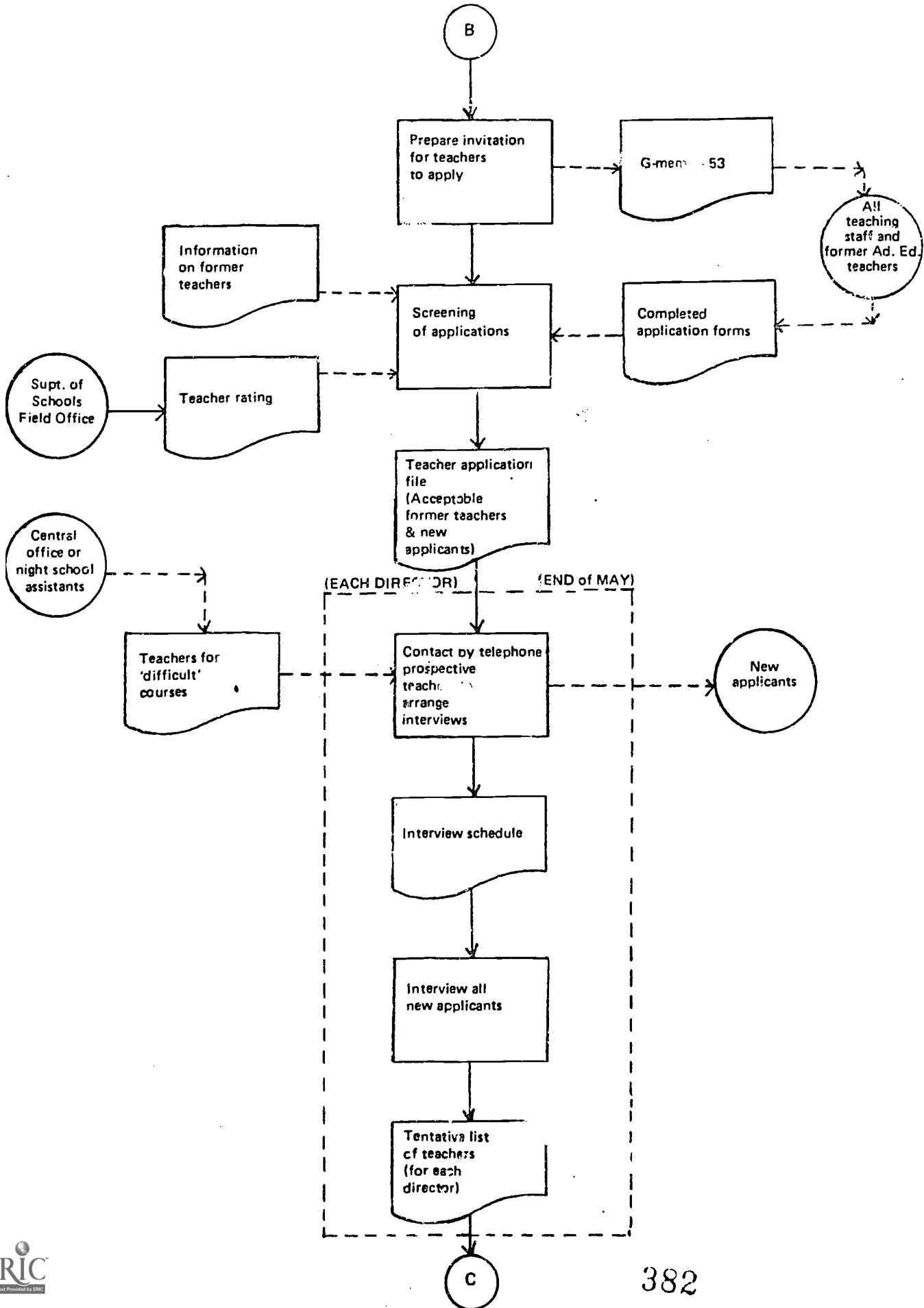
11.1.1 CONTINUING EDUCATION: Adult Education – Selection of Administrative Staff



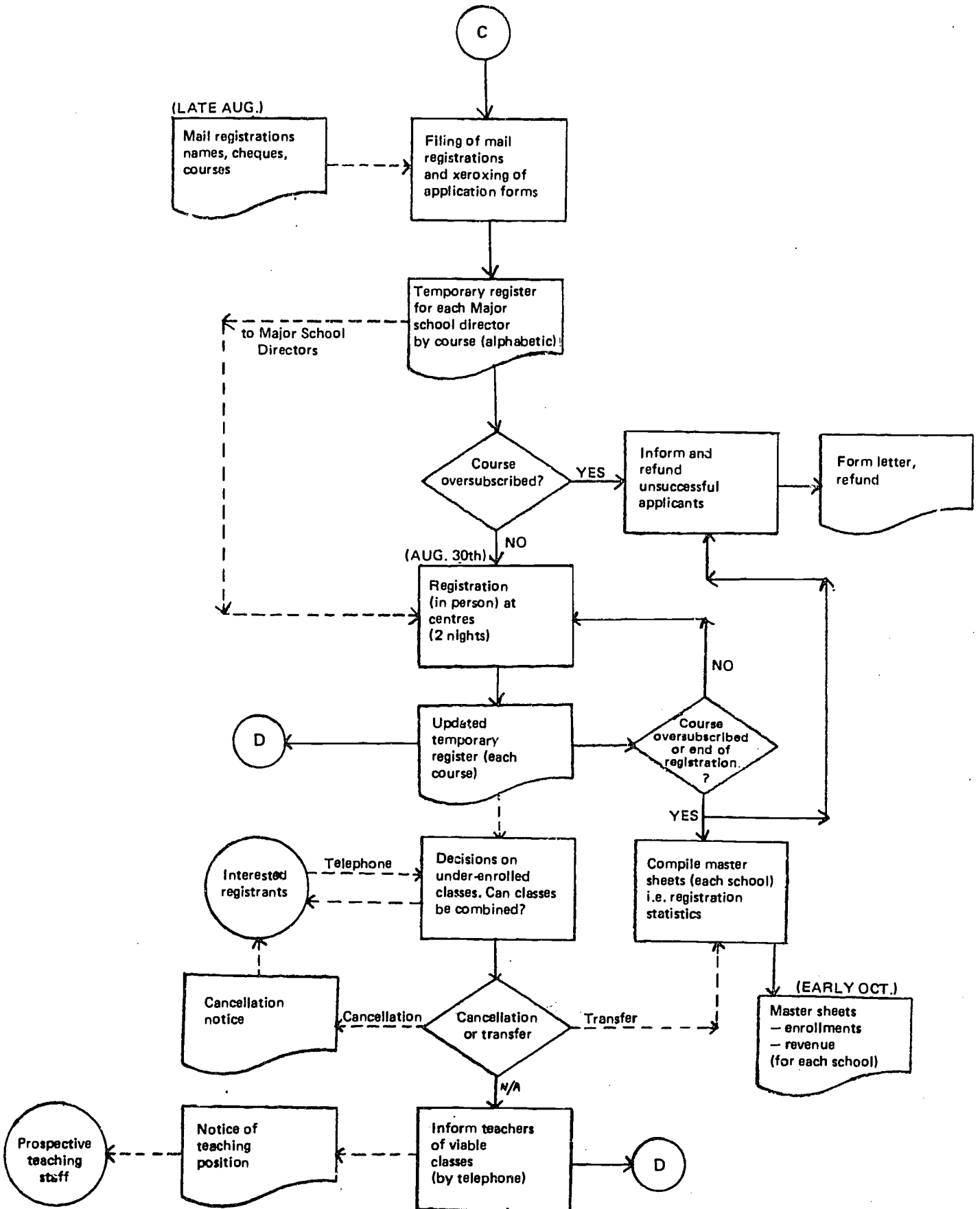
11.1.2 CONTINUING EDUCATION: Adult Education – Brochure Preparation



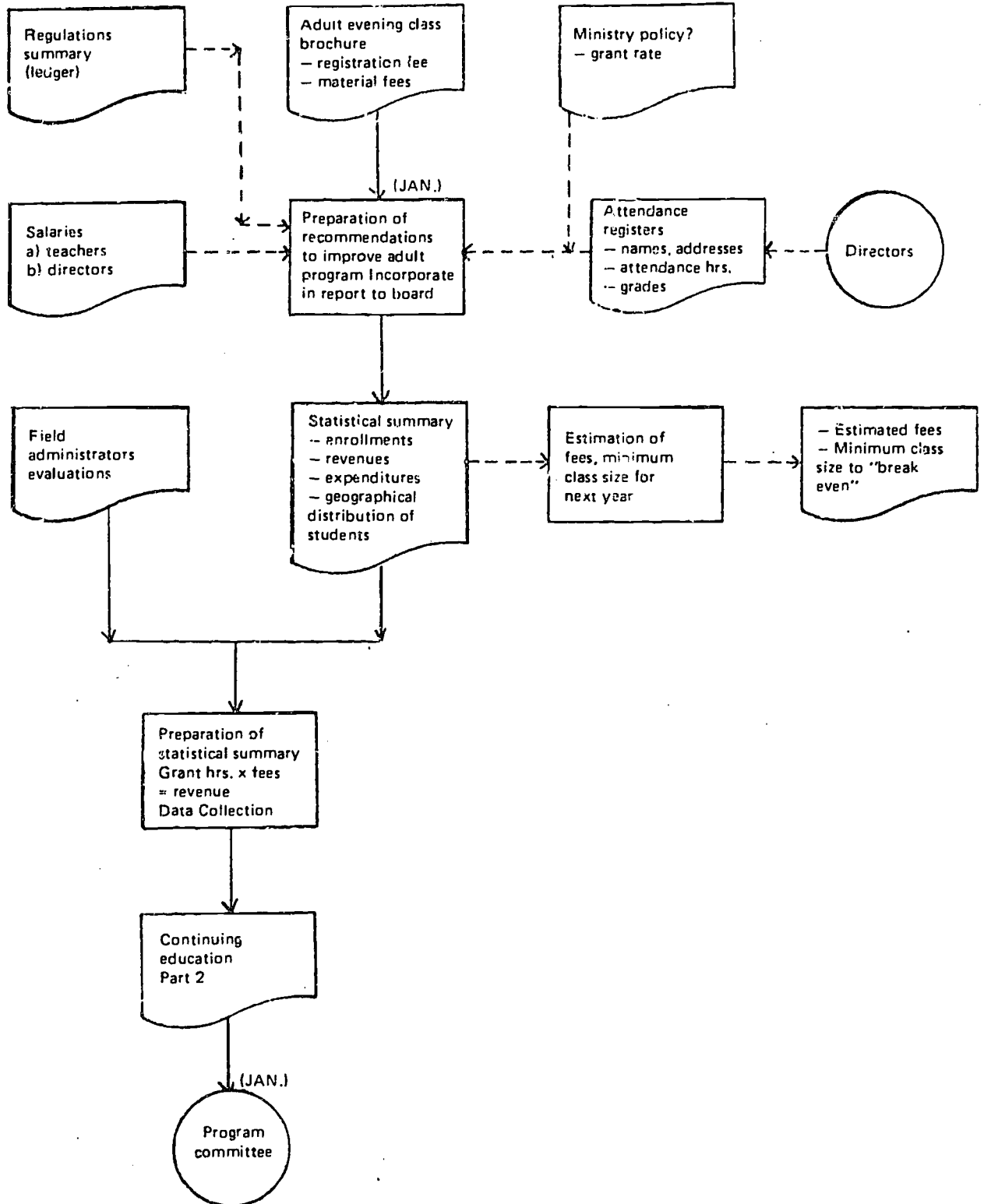
11.1.3 CONTINUING EDUCATION: Adult Education – Tentative Staff Selection



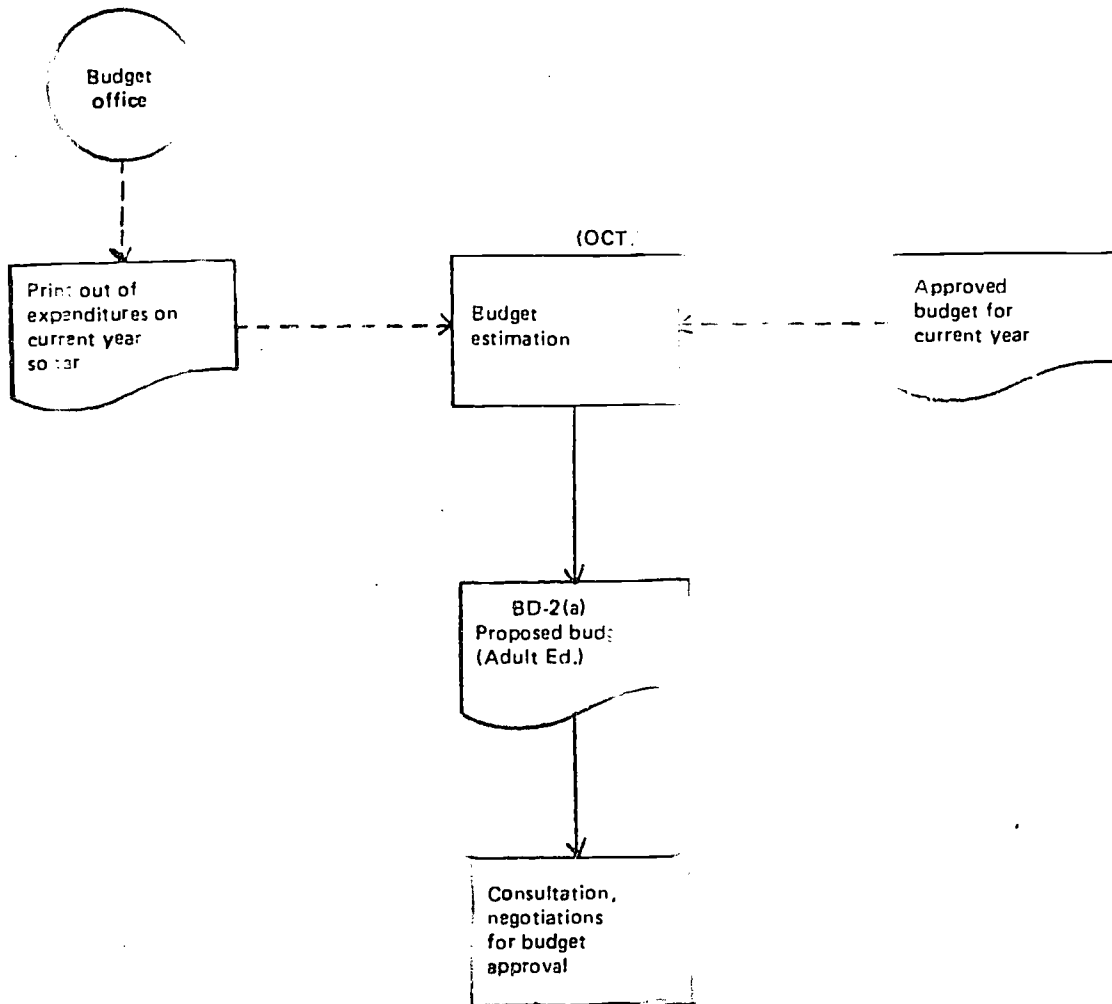
11.1.4 CONTINUING EDUCATION: Adult Education – Registration



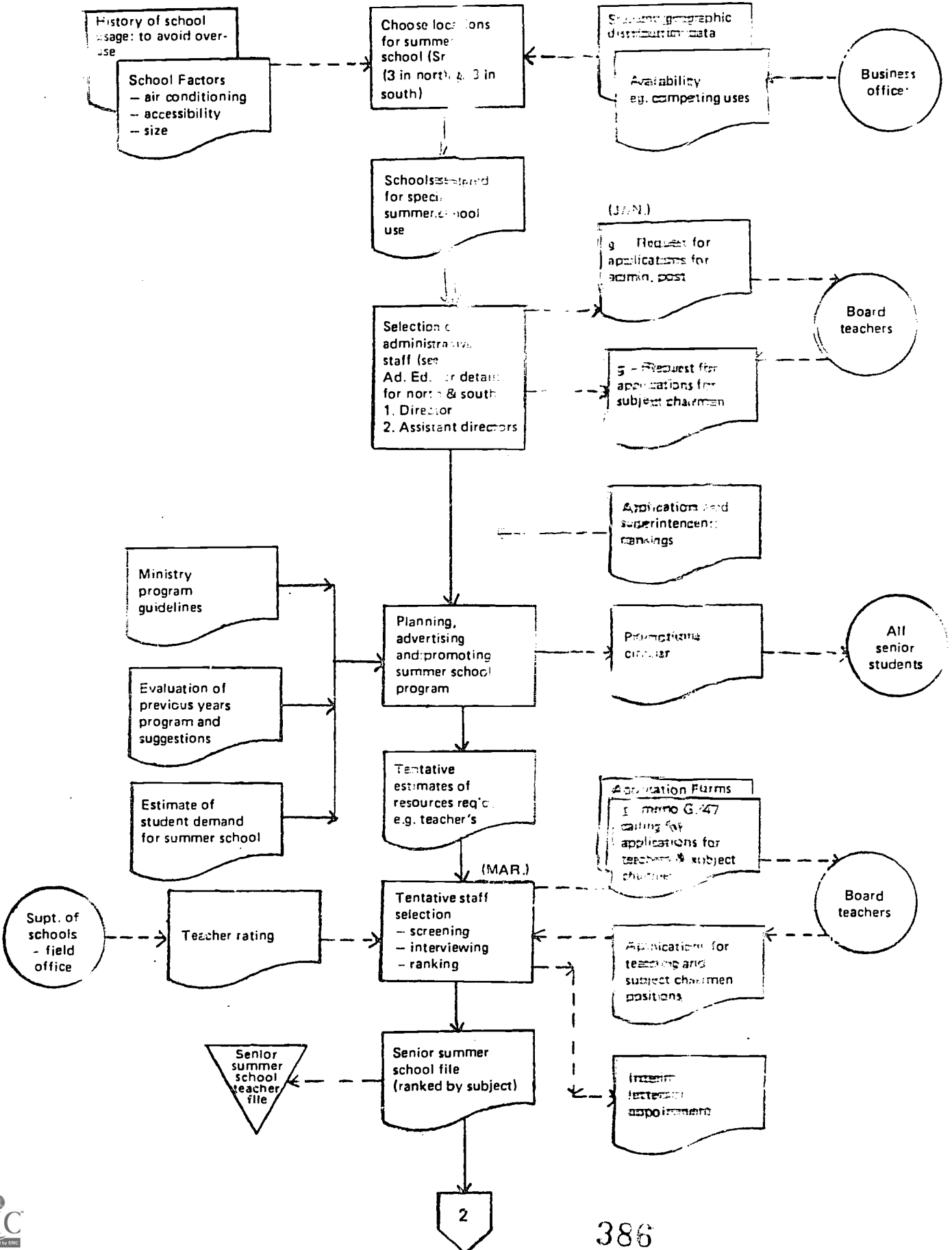
11.1.6 CONTINUING EDUCATION: Adult Education -- Overall Evaluation of Adult Program and Report to the Board

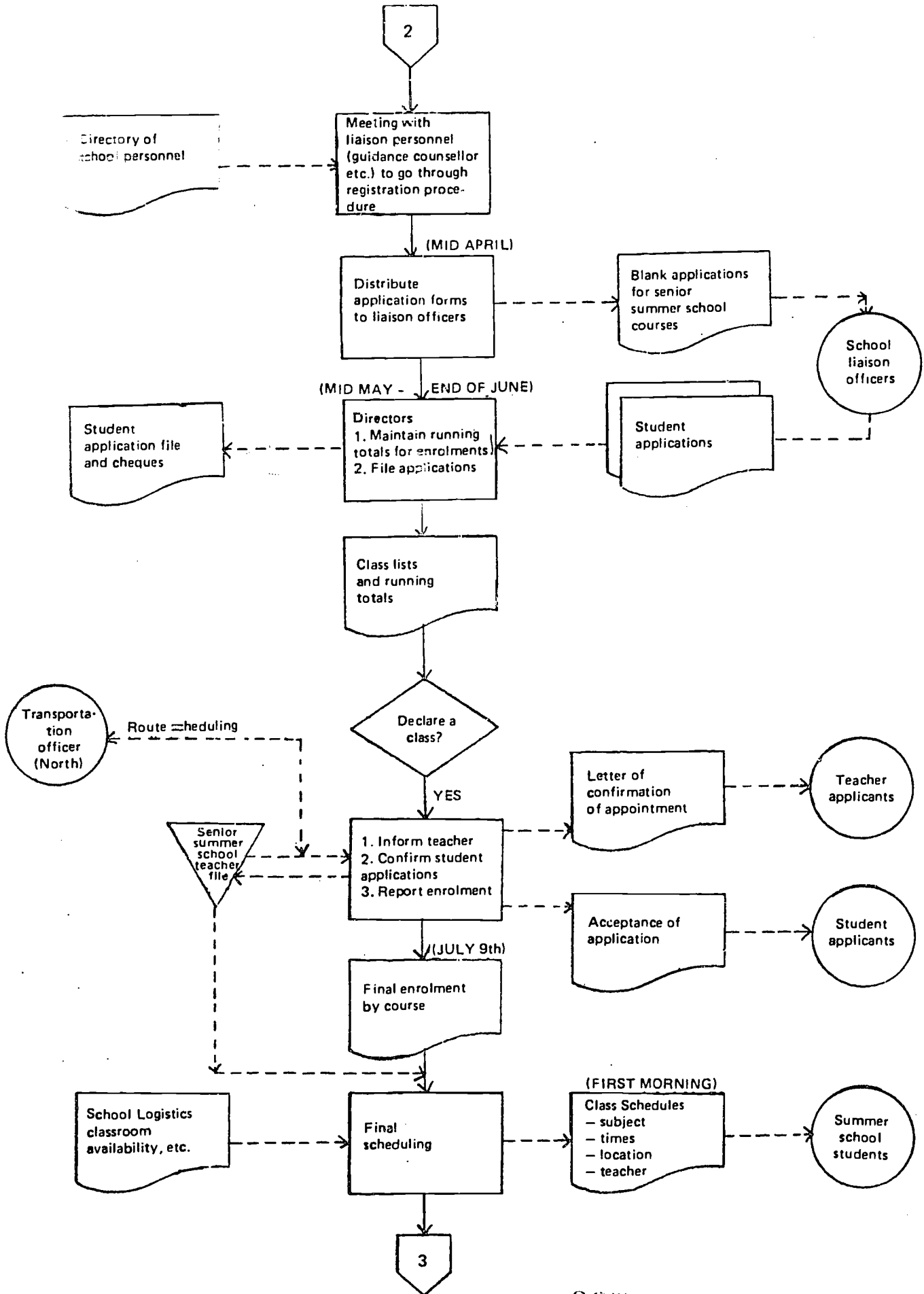


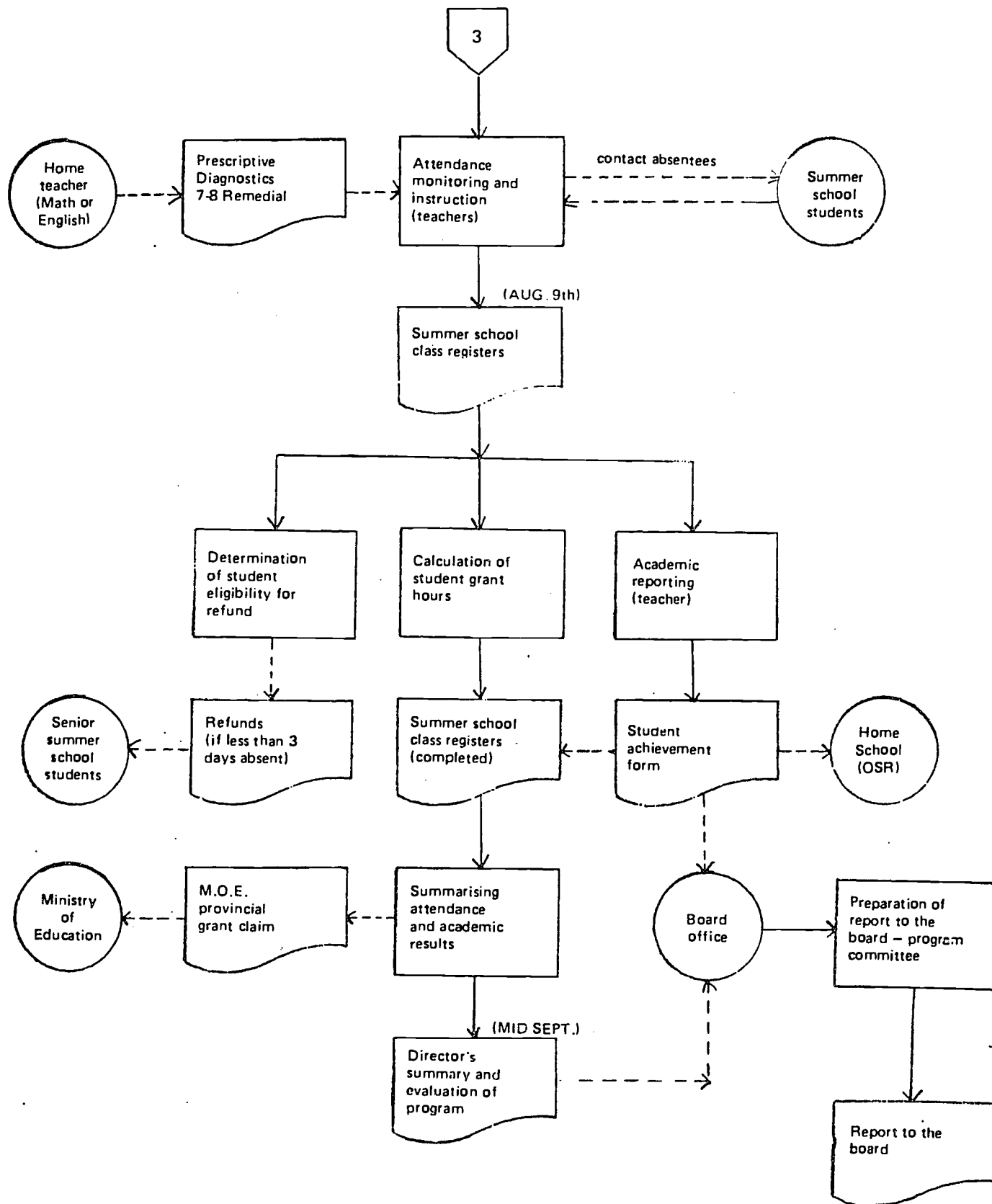
11.1.7 CONTINUING EDUCATION: Adult Education – Budget: Estimates for next year



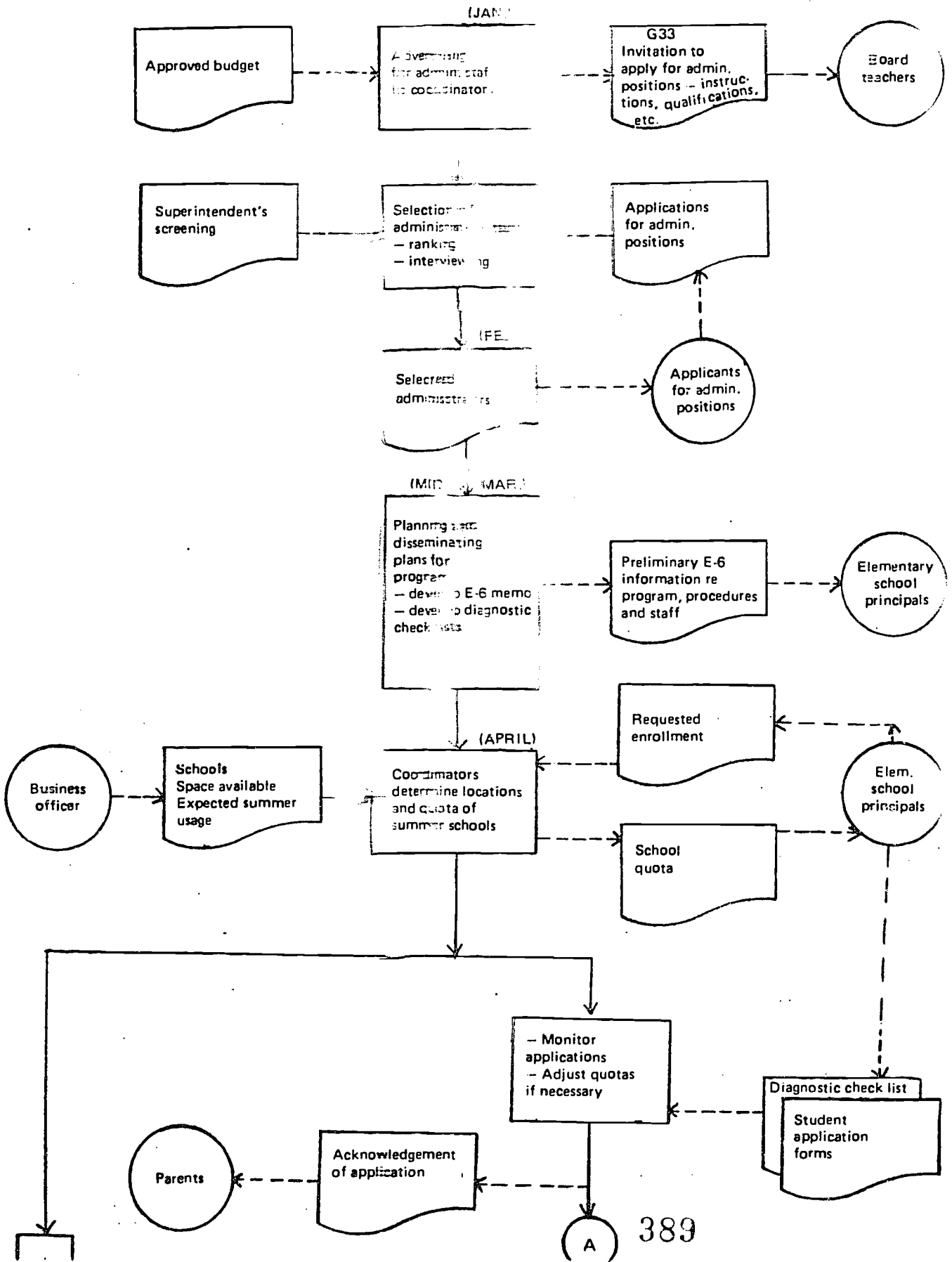
11.2.1 CONTINUING EDUCATION Summer School – Senior

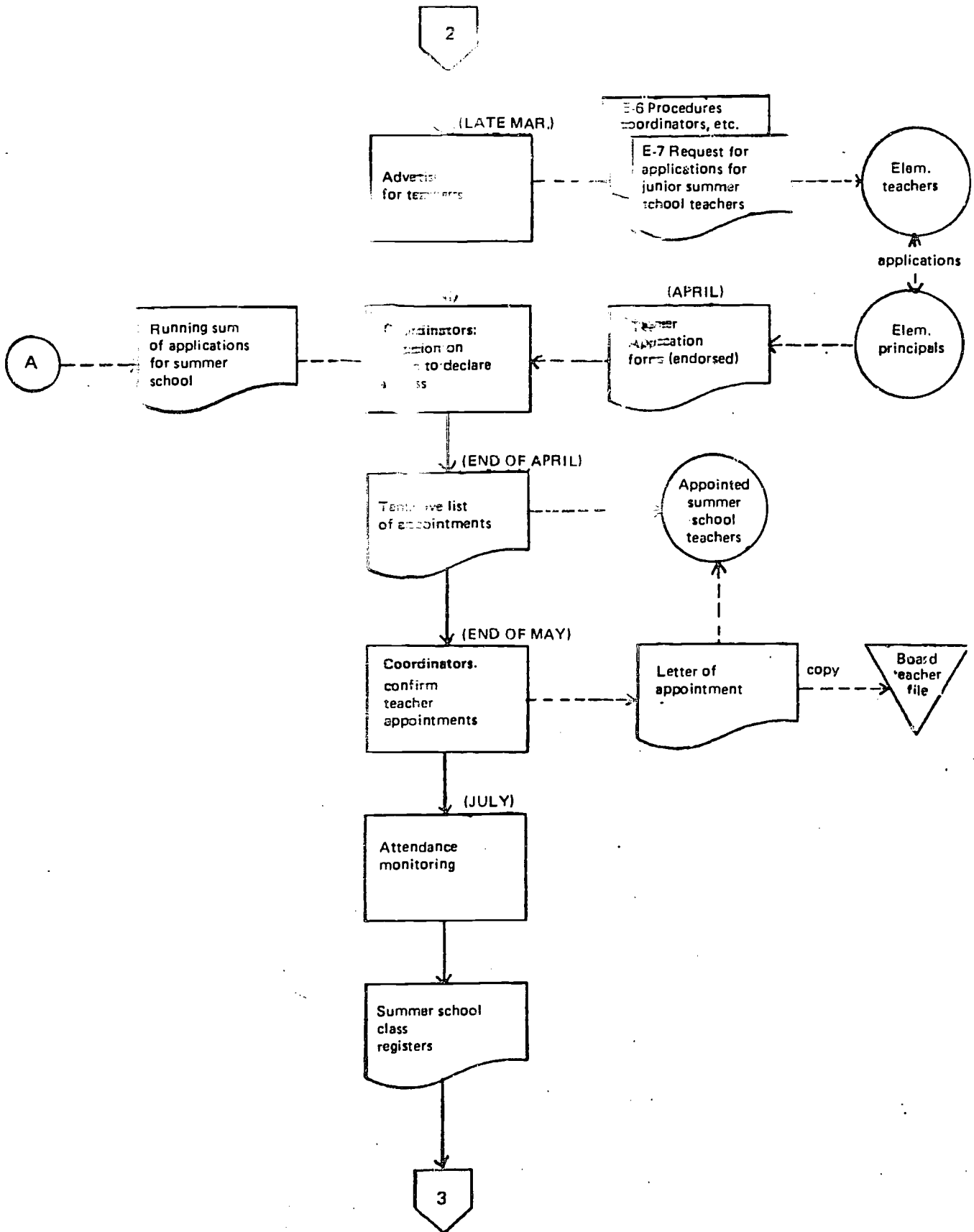


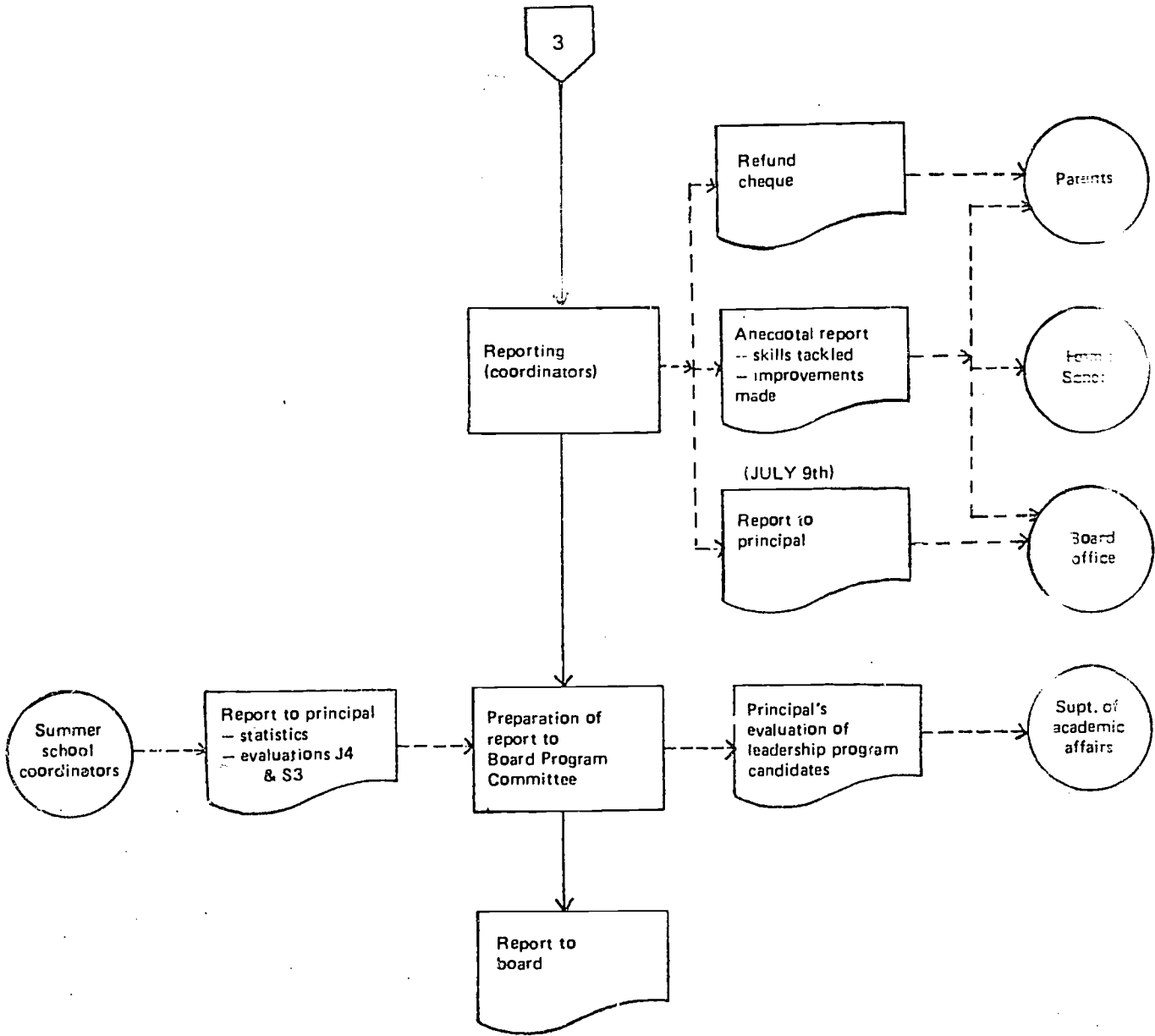




T.1.2.2 CONTINUING EDUCATION: Summer School - Junior







11.3 CONTINUING EDUCATION: Drop-Out Referrals

