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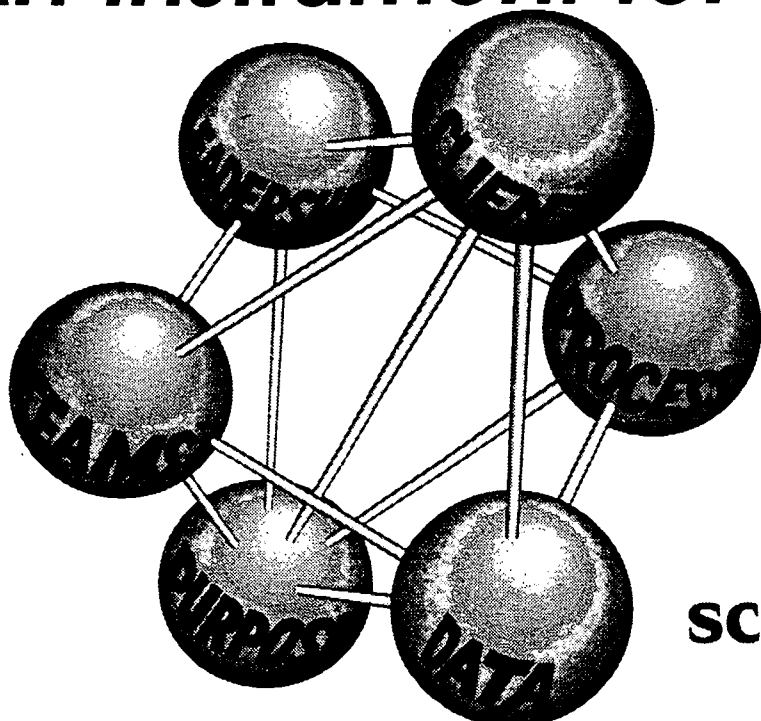
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ABSTRACT

The Quality Education Checklist focuses on key inputs, processes, and outputs of schools needed to ensure continuous improvement. Intended as a self-auditing aid for schools, the checklist may also be used as a method to define the priority of areas for improvement, as a way to gather information from customers, as a professional development resource, and as a method of collecting data for accountability reports. The checklist has 10 headings: access, services for customers, leadership, physical environment and resources, effective learning, students, staff, external relations, organization, and standards. These are further divided into 28 subheadings. The checklist may be completed either individually or as a small-group activity. Opportunities for improvement are identified by assessing both the quality and the importance of a particular characteristic and service. There is space for individual comments, for deciding priorities, and for noting successes and improvement opportunities. (MLH)

The Quality Education Checklist

An Instrument for Self-Auditing



**Martin Barlosky
&
Stephen Lawton**

Making It Work—

THE QUALITY SCHOOLS APPROACH

Developing Quality Schools: Learning Module #2

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Directions

The Quality Education Checklist focusses on the inputs, processes, and outputs of schools which must be attended to to ensure continuous improvement, although it must be emphasized that each of the characteristics is subject to continuous re-definition as the meaning of quality changes. The Checklist is for self-auditing in schools and can be used in many differing ways:

- as a method to determine the priority of areas for improvement
- as a way of gathering information from customers — parents, trustees, students, teachers, administrators, the public, and others
- as a resource for professional development of individuals and teams committed to assessing and improving their contribution to the school and its students
- as a method of collecting data for "accountability" reports to the public and school board officials

The Checklist has ten main headings which appear on pp. 167-174 of the checklist in *Developing Quality Schools: A Handbook* access, services for customers, leadership, physical environment and resources, effective learning, students, staff, external relations, organization, and standards. These are further sub-divided into a total of 28 sub-headings. It concludes with a section in which items are left blank. Individual schools can add items that relate uniquely to them. The

Checklist may be used to assess all of these areas at once for a general overview, or limited to a single area as a part of a focussed effort.

Completing the Checklist

The Checklist can be completed either individually or as a small-group activity; in the first instance, the checklist is completed, scored and the results tabulated and reported. In the second instance, each item is discussed and consensus reached before items are checked. The first method is useful for large or dispersed groups, and for ensuring an "unbiased" perspective. The second is useful for small groups and occasions when the development of a consensus is the primary objective.

The Checklist need not be completed all at once. A group may wish to focus on one section at a time, or to divide responsibility for different sections among groups. Too much data may lead to information overload—focus is important.

The Checklist is based on the notion, outlined on pp. 161 to 166 of the *Handbook*, that opportunities for improvement are identified by assessing both the quality and importance of a particular characteristic or service. As seen in the example on the next page, there are two scales for each item: a quality scale—from poor (1) to excellent (5) in the left column, and an importance scale,— from none (1) to extreme (5)— in the right column.

To complete the Checklist, simply check the two appropriate

		Quality					Importance					Maximum Quality Score X Importance			Comments
		Poor	Quality			Excellent	None	Importance			Extreme	Quality X Importance $2 \times 3 = 6$	$5 \times 3 = 15$	Target Status $15 - 6 = 9$	
		1	2	3	4	5	1	2	3	4	5	QxI	5xI	IO	
Access															
• Point of contact															
Clear initial contact point for customers			✓					✓				6	15	9	Need a sign
Welcoming reception						✓			✓			25	25	0	Pat's great!
Short telephone response time					✓			✓				9	15	6	4 rings
Advice and guidance readily available			✓						✓			10	25	15	
Survey of how well visitors think they were received		✓					✓					2	10	8	Improvement opportunity!
Clear signage			✓						✓			10	25	15	
Point of contact improvement opportunity												62	115	53	+ 6 = 8.8
• Open access															
Ramps and lifts for physically challenged people						✓			✓			25	25	0	
Community languages on signs and in literature					✓				✓			15	12	3	On target!
Open Access improvement opportunity												40	37	3	+ 2 = 1.5
Access improvement opportunity														56	+ 8 = 7.0



boxes to the right of each item that reflect your views. In the example, the first item, "Clear initial contact point for customers", has been checked "2" for quality and "3" for importance. The respondent commented, "Need a sign". The second item, "Welcoming reception", was rated excellent at "5" — which was extremely important, also a "5" — and paid a compliment to the receptionist's gracious manner.

The first section of the Checklist, which is used in the example, concerns **Access** to the school; it has two sub-sections: *Point of contact*, with six items, and *Open access*, with two items. **All items must be checked in order to score each section.**

Calculating Your Scores

The purpose of scoring a Checklist is to highlight successes and to determine where improvement opportunities are greatest. In the example on page 3, "improvement opportunity scores" — or IO scores — are calculated for each item, for the two subsections, and for the whole section. The scoring process involves basic arithmetic and could be automated, but manual calculation, along with group discussion, can ensure that the meaning of the results is fully appreciated.

The first step in scoring the Checklist is to multiply the Quality score by the Importance score ($Q \times I$), and to record this in number in the appropriate column.

In the example, the first item, "Clear initial contact point for customers", is scored 2 for Quality and 3 for Importance; the product, 6, is recorded to the right of the item in the column

by the number of items, 6, to get 8.8. The smallest possible IO score is 0 and the largest possible is 25.

This process is repeated for the next subsection, *Open access*, and results in an average Improvement Opportunity score of 1.5 — meaning that the school is virtually on target for this objective.

To get an overall assessment of improvement opportunities for Access, the total for the IO column is found (53 plus 3 = 56) and divided by 8 to yield 7.0.

Deciding Your Priorities

If an individual, group, or set of groups completes these steps for all sections of the Checklist, then the average Improvement Opportunity scores can be listed in ascending order in the space provided on page 11. The section listed at the top is your greatest success, and should be celebrated with special recognition. The item listed at the bottom has the highest average Improvement Opportunity score, indicating the view that the greatest payoff for concerted effort is in that area. Subsequent attention to subsection averages and item scores can pinpoint where, within an area, work might begin.

Addressing Improvement Opportunities

Chapters 2 and 3 of the *Handbook* describe how teams, processes, and quality tools can be used to analyse systems in order to transform Improvement Opportunities into successful accomplishments.

headed "QxI". It reflects the current status.

The second step is to multiply the maximum possible Quality score, which is 5, by the Importance score, and to record this result in the next column, headed "5xI". For the first item, 5 is multiplied by 3, the Importance rating, to get 15. This product can be interpreted as the "target" that is being sought since it reflects both maximum quality and the relative level of importance.

In the third step, the first product, reflecting the current status, is subtracted from the second product, reflecting the target, to yield the Improvement Opportunity score. For the first item, 6 is subtracted from 15 to yield 9, which is recorded under the column headed IO. The larger the IO score, the greater the opportunity for improvement.

After all items within a subsection are scored, it is possible to review the IO scores to determine where the greatest opportunities lie within that group. Within *Point of contact*, the greatest opportunities have IO scores of 15; they are, "Advice and guidance are readily available" and "Clear signage".

The next stage is to calculate the average IO score for an entire section. First, sum the scores under the QxI column and record the number — 62 in the example; then sum the scores under the 5xI column — 115 in the example. Find the difference by subtracting the first from the second, in this case 53. Double check your answer by summing the scores under the IO column. Then, find the average Improvement Opportunity score by dividing 53

Using the Checklist for Accountability

Surveys of the views of parents, community members, educational officials and others can be conducted using the Checklist. Data analysis can be automated and summary charts and graphs prepared to display the results in presentations to groups. A Pareto chart (pp. 125 and 126 of the *Handbook*) comparing Improvement Opportunities is one obvious possibility. Too often, of course, statistics seem to be an end in themselves. Don't let that happen in your school.

Regular surveys can be used to collect longitudinal information and display progress made toward achieving higher standards. If progress is made, opportunities for significant improvement will become harder to find.

Many things can influence perceptions, so be careful not to assume that all changes in scores necessarily reflect real changes in quality or importance. Attention to education programs raised in the media or by a single, exceptional incident can over-sensitize persons to particular issues. Try to consider these factors when you and your community interpret the data and use it to decide the focus for your quality improvement projects.

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Quality					None	Importance					QxI	5xI	IO	Comments
Poor				Excellent		Extreme								
1	2	3	4	5		1	2	3	4	5				
Access														
• <i>Point of contact</i>														
Clear initial contact point for customers														
Welcoming reception														
Short telephone response time														
Advice and guidance readily available														
Survey of how well visitors think they were received														
Clear signage														
Point of contact improvement opportunity														+ 6 =
• <i>Open access</i>														
Ramps and lifts for physically challenged people														
Community languages on signs and in literature														
Open Access improvement opportunity														+ 2 =
Access improvement opportunity														+ 8 =

Quality					None	Importance					QxI	5xI	IO	Comments
Poor				Excellent		Extreme								
1	2	3	4	5		1	2	3	4	5				
Services for customers														
• <i>Advice and guidance</i>														
Information and guidance service available														
Appropriate pre-entry guidance														
Appropriate continuing guidance available														
Career guidance readily available														
Accessible student wellness and counselling programs														
Advice and guidance improvement opportunity														+ 5 =
• <i>Learning resources</i>														
Well stocked library and resource centre														
Open access to learning resources														
Open access computer facilities available														
Learning resources improvement opportunity														+ 3 =



Quality					Importance								Comments	
Poor				Excellent	None	Extreme				QxI	5xI	IO		
1	2	3	4	5		1	2	3	4	5				
• <i>Social and refreshment</i>														
Affordable cafeteria facilities available														
Adequate sports facilities available														
Relaxation facilities available														
Opportunities for students to organize their own activities														
Social and refreshment improvement opportunity														+ 4 =
Services for customers improvement opportunity														+ 12 =
Leadership														
• <i>Principal</i>														
Has vision and shares it														
"Walks the job"														
Knows the staff														
Knows the students														
Provides and shares leadership														
Gives quality top priority														
Models quality principles														
Principal improvement opportunity														+ 7 =

Quality					Importance								Comments	
Poor				Excellent	None	Extreme				QxI	5xI	IO		
1	2	3	4	5		1	2	3	4	5				
• <i>Values</i>														
Mission clear and understood														
Equal opportunities policy in place and implemented														
Staff and students understand the school ethos														
Strong commitment to the needs of the community														
Values improvement opportunity														+ 4 =
Leadership improvement opportunity														+ 11 =
Physical environment and resources														
• <i>Buildings, classrooms, and workshops</i>														
Clean and attractive														
Fit for purpose														
Contain appropriate visual and learning aids														
Strong commitment to maintaining a safe and secure learning environment														
Buildings, classrooms, and workshops improvement opportunity														+ 4 =



	Quality						Importance					QxI	5xI	IO	Comments
	Poor	1	2	3	4		5	None	1	2	3				
• <i>Stimulating learning environment</i>															
Classroom layouts/individual learning programs exciting to students															
Learning environments well planned and organized															
Stimulating learning environment improvement opportunity →															+ 2 =
• <i>Health and safety</i>															
Student perception/incidence logs kept															
Health and safety policies regularly monitored															
Health and safety improvement opportunity →															+ 2 =
• <i>Resource control and allocation</i>															
Effective resource control exercised															
Resources controlled by those who use them															
Resource control and allocation improvement opportunity →															+ 2 =
Physical environment and resources improvement opportunity →															+ 10 =

	Quality						Importance					QxI	5xI	IO	Comments
	Poor	1	2	3	4		5	None	1	2	3				
Effective learning															
• <i>Appropriateness of learning methods</i>															
Teaching and learning strategies appropriate to course and program goals															
Variety of learning modes available															
Teaching and learning strategies regularly reviewed and measured by a range of specified criteria															
Teaching and learning strategies measured by student response															
Learning is student centred															
Students encouraged to take responsibility for their own learning															
Evaluation methods use to gain customer responses															
Good climate of purposefulness amongst students															
Appropriateness of learning methods improvement opportunity →															+ 8 =



Quality					Importance					QxI	5xI	IO	Comments	
Poor				Excellent	None				Extreme					
1	2	3	4	5		1	2	3	4	5				
• <i>Appropriateness of the curriculum</i>														
Curriculum appropriate to learners' needs														
Content of course and programs relevant and up-to-date														
Short response time to the development of new course and program content														
Evaluation by clients of the relevance of the offering														
Good liaison with employers and the community on the delivery of courses and programs														
Appropriateness of the curriculum improvement opportunity →														+ 5 =

Quality					Importance					QxI	5xI	IO	Comments	
Poor				Excellent	None				Extreme					
1	2	3	4	5		1	2	3	4	5				
• <i>Monitoring and evaluation</i>														
Student feedback regularly obtained														
Feedback from other customer groups regularly obtained														
Student and community questionnaires used where appropriate														
Institution has formal systems for review and evaluation														
Feedback used in policy-making														
Monitoring and evaluation improvement opportunity →														+ 5 =
Effective learning improvement opportunity →														+ 18 =
Students														
• <i>Students matter</i>														
Clear signage														
Clean and well maintained rest rooms														
Student handbooks and guides available														
Staff talk to students														
Absence of artificial barriers														



	Quality						Importance					QxI	5xI	IO	Comments
	Poor	1	2	3	4		5	None	1	2	3				
• <i>Students matter</i> (continued)															
Wide range of student services															
Good transportation arrangements															
Range of leisure, recreation, and sporting facilities available															
Students matter improvement opportunity →															+ 8 =
• <i>Student Satisfaction</i>															
Good rapport between staff and students															
Happy students and satisfied customers evidenced through surveys and questionnaires															
Students have a sense of pride in their work															
Students kept informed															
Students' views regularly solicited															
Student satisfaction improvement opportunity →															+ 5 =
Students improvement opportunity →															+ 13 =

	Quality						Importance					QxI	5xI	IO	Comments
	Poor	1	2	3	4		5	None	1	2	3				
Staff															
• <i>Attitude and motivation</i>															
Committed and knowledgeable															
Student centred															
Take responsibility for their own quality															
Have a sense of enjoyment															
Respond readily to individual needs															
Attitude and motivation improvement opportunity →															+ 5 =
• <i>Teamwork</i>															
Committed to teamwork and team approaches															
Have been trained in the skills of teamwork															
Have strong cohesion															
Have a clear idea of the limits to their authority															
Have a resource base that allows them to improve quality															
Value and support good practice															
Regularly consulted on policy															
Teamwork improvement opportunity →															+ 7 =



Quality					None	Importance					QxI	5xI	IO	Comments
Poor				Excellent		Extreme								
1	2	3	4	5		1	2	3	4	5				
• <i>Staff development</i>														
Institution committed to developing its staff														
Is proactive and clearly links institutional needs to school vision														
Consults on individual development needs														
Is adequately resourced and funded														
Is an institutional priority														
Includes all-staff														
Positive staff development in application of quality principles														
Staff development improvement opportunity													+ 7 =	
• <i>Facilities</i>														
Good workrooms														
Adequate and appropriate equipment and facilities														
Opportunities for professional discussion and debate														
Facilities improvement opportunity													+ 3 =	
Staff improvement opportunity													+ 22 =	

Quality					None	Importance					QxI	5xI	IO	Comments
Poor				Excellent		Extreme								
1	2	3	4	5		1	2	3	4	5				
External relations														
• <i>Communications</i>														
Coherent communications strategy														
"Market" research carried out														
Positive seeking out of customer views														
Student and employer questionnaires employed														
Communications improvement opportunity													+ 4 =	
• <i>Community</i>														
Excellent links with relevant communities maintained														
Community views regularly solicited														
Strong links with business and industry through partnerships														
Strong links with community agencies through partnerships														
Community improvement opportunity													+ 4 =	
External relations improvement opportunity													+ 8 =	



Quality					Importance										
Poor				Excellent	None	Extreme									
1	2	3	4	5		1	2	3	4	5	QxI	5xI	IO	Comments	
Organization															
• <i>Strategic planning</i>															
Institution has broad aims and objectives															
Staff at all levels are aware of institutional direction															
Institution has a written strategic plan															
Plan identifies how staff can contribute to success															
Strategic planning Improvement opportunity →														+ 4 =	
• <i>Organizational culture</i>															
Simple and lean structure															
Authority delegated down															
Change is part of the culture															
Universal statement of direction															
Strong commitment to peer evaluation and review															
Based on teamwork															
Learning maximization and prudent risk-taking emphasized															
Tolerance for mistakes															
Organizational culture Improvement opportunity →														+ 8 =	

Quality					Importance										
Poor				Excellent	None	Extreme									
1	2	3	4	5		1	2	3	4	5	QxI	5xI	IO	Comments	
• <i>Communications</i>															
Good communication seen as major priority															
Bottom-up, not just top down															
Mutuality in communication seen as lifeblood of the institution															
Communications Improvement opportunity →														+ 3 =	
Organization Improvement opportunity →														+ 15 =	
Standards															
• <i>"Hard" standards</i>															
Excellent results on exams and measures of student success															
High retention rates															
Effective use of resources															
Measures of value-added capabilities in place															
Good student and community feedback based on systematic data collection															
Effective budgetary control															
"Hard" standards Improvement opportunity →														+ 6 =	



	Quality						Importance					QxI	5xI	IO	Comments		
	Poor	1	2	3	4		5	None	1	2	3					4	5
• "Soft" standards																	
Caring atmosphere																	
Student welfare and wellness a priority																	
Customer service in evidence																	
Welcoming environment																	
Commitment to learners of all abilities																	
"Soft" standards improvement opportunity																+ 5 =	
• Correct application of standards																	
Rigorous program of self-evaluation in place																	
Institution does not measure itself on "hard" priorities alone																	
Data are cycled back into improvement initiatives																	
Correct applications of standards improvement opportunity																	+ 3 =
Standards improvement opportunity																	+ 14 =

	Quality						Importance					5xI	QxI	IO	Comments	
	Poor	1	2	3	4		5	None	1	2	3					4
Other characteristics																
Other characteristics																+ -



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