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Supporting the Merger of Two School Boards in Ottawa, Ontario, Canada: The Ottawa–Carleton Community and Public Education to 2015

Claudia Chowaniec, Ray Gordezky, and Jim Grieve

INTRODUCTION

“The involvement of the whole community in public education is vital for student learning,” remarked Jim Grieve, director of education, as he thanked participants at the conclusion of the future search conference. “The challenge is to set achievable goals and find the commitment and community support to make them happen. Educators know they cannot succeed on their own.”

The Ottawa–Carleton District School Board’s long-range planning conference, held on May 13–15, 1999, brought together not only senior staff and trustees, as is traditional in strategic planning, but also principals and vice principals, teachers, union and non-union teaching and support staff, students, and parents. In addition, there was representation from the wider community, including the government of Canada, the Ontario Ministry of Education and Training, postsecondary institutions, businesses, health and social service providers, police, and members of the local media. The future search conference generated ideas for future directions in public education in Ottawa–Carleton, looking forward to when the current group of junior kindergarten students would graduate in 2015.

This chapter describes the major areas of focus, how the wider community became involved in implementing the actions, the coordinating function played by the steering committee, and how the action plans became part of the board’s strategic plan. The chapter concludes with a description

of the progress achieved by the action groups to the end of the school year in the spring of 2002 and the community's hopes for the future.

BACKGROUND

In 1995, the government of the Province of Ontario, which has responsibility for education, undertook a massive overhaul of the school system in the entire province. Reforms were initiated in many areas, including equalization of funding provided to all of the province's schools, reduction of administrative costs by amalgamating school boards and closing underutilized schools, and revision of the curriculum to delete the fifth and final year of high school to bring Ontario in line with the other provinces. In what was then called the Regional Municipality of Ottawa–Carleton, two large public school boards—the Ottawa Board of Education and the Carleton Board of Education—were merged on January 1, 1998. With the merger of these two boards, the Ottawa–Carleton District School Board (OCDSB) became the largest school board in Eastern Ontario, serving students within a 2,760-square-kilometre area (1,715 square miles). The OCDSB is the seventh largest school board by student population in Ontario. It serves approximately 80,000 students across 118 elementary and 27 secondary schools. In all, the board owns 11 million square feet of building space worth approximately \$1.1 billion.

The newly appointed board of trustees selected a new director of education, Jim Grieve, formerly a superintendent with the Toronto District School Board (see chapter 2) and coauthor of this chapter. His first task was to lead the integration of the two school boards and undertake other challenges set before the board by Ontario's ministry of education. When the two boards amalgamated in 1998, there were huge differences between them that had to be accommodated. Differences between the Ottawa Board and the Carleton Board included

- Mainly urban versus largely suburban and rural populations to be served.
- Older, often turn-of-the-century infrastructure versus newly built schools.

- Stable, in some areas declining, school-age populations versus rapidly growing communities of young families.
- Schools that were not fully utilized versus schools with dozens of portable classrooms. The Ministry of Education claimed it would not fund new schools unless those that were not 100 percent utilized were closed.

The Ontario Ministry of Education had dramatically shifted the funding formula for education, along with ordering the amalgamation of these two vast school districts. Traditionally, education money had come from the municipal property tax base. Communities could decide, within a preset range, what percentage of local taxes would go to education. The goal of this new approach to education funding by the province was that all schools would be funded equally, based on their population, eliminating the disparity between wealthier and poorer communities. At the same time, the new funding formula essentially froze and, in the case of wealthy boards such as Ottawa, reduced the amount of overall funding available. All decisions on local education were taken away from the municipalities, since they no longer controlled the funding allocation. The local school boards were now required to report to the Ontario Ministry of Education rather than to their board of trustees.

WHY FUTURE SEARCH

Jim Grieve, the new director of education, knew the challenges he faced when he accepted the position in 1998. With all of the immediate differences to be faced, Jim decided that the only way to bring all these people together with their diverse backgrounds, interests, and concerns was to appeal to the passion they all shared—excellent education. His decision to conduct a future search in the spring of 1999 was, therefore, one of his first steps. In Jim's own words:

I chose future search to present to the trustees as a process, a conceptual process, because I felt that Ottawa–Carleton in its amalgamated new version was already highly interested in community involvement. The school board had a history of having strategic planning over the years that was more clas-

sical and more management and senior trustee-oriented. I felt I wanted to hear from the whole community.

Two boards with two very distinct cultures had to be brought together. This doesn't just happen on its own. Nothing was done in advance of amalgamation to bring the cultures together. There was no long-term plan in place; the two boards were just fused. There needed to be a grassroots, community based review of what the new board should look like.

The inherent risk of the future search process is that what comes out of the process may not be all that senior staff and trustees want. When we started in Ottawa–Carleton we were unsure of the result at the end of the process. This was a big leap of faith for politicians (trustees) and senior staff. I'd done enough reading and talking with the former director of the Toronto District School Board to know that the future search process looked sound. I believe when you put the right people in the room, it has to work. Our future search consolidated the will of not just of a few, but of many, many voices. You can't easily abandon these notions that represent common voice of the community.

THE FUTURE SEARCH

The steering committee first met in January 1999, in the midst of one of Ottawa's worst snowstorms. Five years later, looking back on all those various issues and decisions the steering committee had to make in planning the future search, one aspect continues to stand out: the commitment of all the community leaders from so many different walks of life. Their attendance attests to the leadership and the passion that Jim, the steering committee, and the very supportive administrative team were able to communicate.

The future search conference itself turned out to be just about textbook perfect, but we all knew this was just the first step. About 80 people attended the conference, including students and parents, senior staff and trustees, principals and vice principals, teachers, union members, and affiliated and nonaffiliated support staff. In addition, there was representation from the wider community, including the government of Canada (Learning and Literacy Directorate), the Ontario Ministry of Education, postsecondary institutions (Carleton University, University of Ottawa, and Algonquin College), business (Nortel, Ottawa Centre for Research and Innovation), and

health and social service providers (the Children's Hospital of Eastern Ontario, the Children's Aid Society, the Ottawa–Carleton Regional Police, and the municipal government's Child Care Division).

THE ACTION AREAS

Seven action-planning groups were active following the conference. Some were later merged; others saw their work incorporated into activities already being undertaken by board staff. Following the conference, plans were made for organizing the work, and reports of the action groups were circulated to all participants. The seven action areas are summarized in table 4.1.

In the six weeks following the future search, each of the seven groups named a chair, developed a clear statement of mandate and goals, and set out an action plan. A post-conference steering committee was established to support the groups with the resources they required, including meeting space, secretarial help, and the resources of additional experts who had not been part of the future search conference. This committee also maintained the long-range view and ensured ongoing communication among the groups.

In January 2000, the school board held a one-day workshop that brought the original future search participants together with many others who had become actively involved in the work of the seven groups. They discussed their progress, challenges, and next steps.

ACTION GROUP PROGRESS 2000–2002

1. Expectations for Learning/Accountability

1.1 Set Achievement Targets for All OCDSB Graduates

Secondary school and grade 1 teachers working on “Student Knowledge and Skills” profiles developed target profiles for OCDSB graduates and for grade 1 students. Teachers used these profiles as a reference point to develop achievement targets for all levels from grade 1 to high school graduation.

Table 4.1. Summary of Action Area

<i>Action Areas</i>	<i>Objectives</i>
Expectations for learning and accountability	Objectives include establishing expectations for the skills and knowledge that an OCDSB graduate in 2015 should have when entering the workplace and going on to post-secondary studies. Primary focus areas are literacy, mathematics, and social/life skills (communication/interaction and problem-solving). After defining expectations, the group will turn to accountability issues: How do we know our students have reached these expectations? What measures should be used to ensure expectations have been met?
Staff training and support	The goals are to develop a plan to provide time for creative ways of providing staff training, including the use of community resources and new strategies for supporting and valuing teachers and staff.
Student-tailored learning, technology, and programming	This group will develop plans for action in three linked areas identified during the conference: student-tailored (individualized) learning/ability to learn at one's own pace, technology as an enabler, and programming to include more variety and choice.
The school as hub in the community	While it might not be realistic to expect increased financial resources, increased efficiencies through cooperation are hoped for. The objective is to see one or more pilot projects that make the campus concept a reality. To achieve this vision, help will be needed from many agencies as well as local communities.
Safe schools	Objectives include ensuring a continuum from junior kindergarten to grade 12 of programs that address "kids caring for kids" on a daily basis and a support model for students at high risk for recidivism. This action group will work through the board's existing Safe Schools Committee.
Volunteerism	The focus will be on parents' involvement in their children's education, ranging from at-home activities such as reading with each child to at-school activities such as meeting with teachers for interviews, helping in the classroom, and becoming involved through school councils in a wide range of activities in support of students.
Board structures and processes	This group will work to facilitate increased interaction among the many players in our system (trustees, staff, parents, students, and business and service providers) with a view to improving decision-making. Objectives include gathering information on alternative models and identifying goals/timelines for possible structural and procedural changes in the short, medium, and long term. Development of a policy on consultation with the community is to be a priority.

These profiles were to serve as achievement targets for specific grade levels. A “fridge checklist” version for monitoring of progress, and a “student friendly” electronic version were planned for students to build their own “portfolios” of knowledge and skills development. Care was taken to include skills that could be achieved by students who are workplace-bound, as well as for those who are college or university-bound.

1.2 Audit Program Variability

A number of initiatives were undertaken, including a plan and draft questions developed by multiple stakeholders for use in the 2001–2002 Review of Education in the Arts. This work was used by staff in their Arts Education Review Process in 2002.

2. Staff Training, Development, and Support

2.1 Create an Inventory of Existing Available Technology Resources

Several projects were undertaken to enhance teachers’ resources for teaching. For example, one initiative identified and obtained consensus on a common set of software applications needed to support the curriculum. Another initiative evaluated computer-based tools that would assist teachers with their administrative activities and improve access to information for teachers, communication with parents, attendance recordkeeping, access to report cards from home, class lists, standard marks-keeping, and secure remote access to board resources

2.2 Employee Recognition Policy and Morale

Development work in this area began with an Organizational Effectiveness Survey and subsequent work plan. Based on the survey results, the Board’s Employee Support Services Division of Human Resources worked with the Quality Assurance Division to assess what would be required to improve employee morale. Union presidents met with staff to discuss issues and possible approaches for improving morale.

Progress was made on revising the Board's Employee Recognition Policy to include recognition of individuals and groups from all sectors of the OCDSB community. This included recognition of long service, outstanding achievement, and contributions to further the aims and objectives of the board by community organizations, community volunteers, parents, students, and staff.

3. Individualized Student Learning Opportunities

New technologies explored for classroom uses include assessing possible uses of videoconferencing; creating an inventory of best practices for student-tailored learning, including Web- and computer-based software applications; upgrading student systems and exploring data transfer for potential administrative uses of PDA technology for schedules, class lists, and emergency information; and exploring e-learning course development with local colleges and other partners.

4. School as Hub of the Community

A community dialogue session took place in November 2001 with representation from school principals, Children's Hospital of Eastern Ontario, the Youth Services Bureau, the University of Ottawa, City of Ottawa People Services Department, school councils, and a variety of other organizations. The group reached consensus on the essential characteristics of the hub, its values, and its implications. Participants agreed that hubs share certain key features wherever they may be located (in a school, community agency, church, etc.), including family focus, continuum of services, reduction of duplication and gaps in services, collaborative funding and planning, staff training and development, and community capacity building. Following the community dialogue, the school board supported the establishment of hubs in the school system.

The board's website (www.ocdsb.edu.on.ca) provides information on resources and potential funding to schools and school councils. It is the intent of the Hub Action Group to continue working with community groups to assist all schools in their community development and partnership strategies.

5. Safe, Caring Schools

5.1 Ensure Continuous Updating and Consistent Application of Safe Schools Policies

Following additional consultation with stakeholder groups in fall of 2001, the board approved a series of Safe Schools policies. These policies have recently been revised to meet the new Ontario Ministry of Education regulations, particularly with respect to suspensions, expulsions, as well as hearing and appeals panels.

5.2 Alternatives for Students Experiencing Repeated or Long-term Suspension or Expulsion

Under a provincially funded partnership with the Ottawa–Carleton Catholic School Board (OCCSB), and with assistance from the Youth Services Bureau, plans were completed in January 2002 for a boardwide, strict discipline program located at St. Elizabeth’s Elementary School. This program provides alternative measures for students on full expulsion, with a specialized educational service and a therapeutic component. It also provides specific services on an as-needed basis through community mental health providers.

6. Volunteers

6.1 Increase Number of Volunteers

As of February 2002, in addition to parent volunteers, there were 751 nonparent volunteers in the schools providing 2,124 volunteer hours per week. This is almost double the number of volunteers and hours recorded the previous year. Most schools (98 percent elementary and 50 percent secondary) reported having enough volunteers to support school activities. Areas identified for increased support were remedial and special education and tutoring (elementary and secondary), mentoring and cocurricular activities (elementary), and library assistance and office assistance (secondary).

6.2 Training Sessions for Volunteers and Volunteer Co-coordinators

Volunteer training sessions cosponsored with the Ottawa Centre for Research and Innovation were held November 2001 and January 2002, with

120 and 105 volunteers in attendance. Two training sessions were provided for volunteer coordinators in September and October 2001. In December 2001, 117 schools or sites reported the names of their volunteer coordinators. A celebration and recognition event was held for volunteer coordinators during National Volunteer Week in April 2002.

7. Board Structures and Processes

This group worked to facilitate increased interaction among the many players in the education system: trustees, staff, parents, students, businesses, and service providers, with a view to improving decision making. Objectives included gathering information on alternative models and identifying goals and time lines for possible structural and process changes in the short, medium, and long term.

NEXT STEPS: DEVELOPING A STRATEGIC PLAN: 2000–2003

The development of a strategic plan was one of the most important goals that Jim Grieve had set for himself and his executive team. The strategic plan would include specific areas of focus, as well as a formal process for setting performance measures and reporting on progress achieved. The school superintendents and the trustees developed the strategic plan framework for 2000–2003 in a series of meetings. They agreed that the themes from the future search action groups would serve as the backbone of the plan. Corporate management and fiscal planning were added to round out the administrative requirements for regular reporting. As one superintendent later expressed, “although this process of setting priorities and establishing measurable objectives was at times very painful, it helped to build a stronger team with a better focus.”

Once the trustees agreed to develop a strategic plan, the director undertook a systemwide evaluation that was to provide a snapshot of what existed at the beginning of the new planning cycle and a baseline against which progress could be measured. By September 2001, system improvement plans had been developed based on the systemwide evaluation and were starting to be implemented. Jim appointed school superintendents as champions for each action team initiative. The individual action teams met nearly every month. A number of the original future

search participants were actively engaged on these teams. Every six months the group of superintendents came back together again to report on progress. Each group set a target date for action and advancement of ideas, with a date to report back on their work. One year later, senior staff and members of action teams gave a report to the board of trustees. This report set high expectations for the planning and review process to achieve real gains for the students.

The future search initiatives served as the basis for the performance objectives for all senior board staff, including the director, school superintendents, and the principals. All were responsible to the board of trustees to complete the actions they had committed to. Jim spoke of the process in this way:

I believed in what we produced that day. I believed that each of the seven areas was going to improve the lives of children in Ottawa–Carleton. I was the champion over all. Each of our senior staff was given one of the directions to champion. In any sector, the leader sets the tone. Once the action started, I had to get out of the way and let those who were prepared to lead take responsibility. I counted on them to lead in the best way possible.

Superintendents were asked to visit all the schools for which they were responsible and to prepare school reviews for improvement three times a year based on information they gathered in their schools. Superintendents remember these conversations with each of their schools with enthusiasm. In a recent interview, one superintendent said, “Although this process of setting priorities and establishing measurable objectives was at times very painful, it helped to build a stronger team with a better focus.”

SUCCESS AND MAJOR ROADBLOCKS

By the start of the school year in September 2001, Jim Grieve had achieved his goal. The grassroots, community-based ideas and directions that had come out of the future search had been formally embedded in an effective strategic planning process that was to ensure their continuing relevance and evolution as requirements changed.

However, the past five years have been very difficult for Ontario education as a whole, and the OCDSB in particular. The budget freeze im-

posed by the Ministry of Education as part of the school reform program has reduced resources and increased pressures. After the new provincewide funding formula came into effect, school districts, especially Toronto and Ottawa, the largest urban school boards, found themselves with too little money to balance the expenses of maintaining their aging inner-city education infrastructure with the demands for new school construction in their rapidly growing suburbs.

The strategic plan had listed the following goal for the development of the board's budget for 2002–2003: partner with trustees to acquire additional funding from the provincial government to address the shortfall in areas such as salary and benefits, facilities maintenance, ESL (English as a Second Language), and special education. Public meetings were held in five locations across the OCSDB jurisdiction in January 2002 to obtain input on ways to cut the budget. The chair of the Board of Trustees and the director of education met with the Ontario minister of education in January 2002 to emphasize the urgency of the board's financial difficulties under the current funding model. The board and its staff continued to urge the provincial government to improve funding for the OCSDB for fiscal year 2002–2003. Regrettably, no settlement could be reached. The immediate budget shortfall began to take precedence over maintaining the rigor of the strategic planning process for some of the trustees.

Progress on the strategic plan was further slowed when, in July 2002, Jim Grieve accepted a new position as director of the Peel District School Board, in central Ontario near Toronto.

The strategic plan suffered another setback just a few months later when the municipally elected board of trustees of the Ottawa–Carleton District School Board decided not to present a balanced budget to their ministry of education, even though it was required to do so by law. The board was unable to balance the budget because it was woefully inadequate. It knew that it would be impossible to continue its many excellent programs: special education programs to mentally and physically challenged students; ESL training to its diverse, multicultural, and multilingual populations; distinctive performing and visual arts programs; and coaching support for a broad range of athletic teams. These varied and often expensive educational programs and services serve as a major economic lever in attracting people and their skills, education, and investment to this large urban center.

The Ministry of Education responded by replacing the board's trustees with an appointed supervisor. However, the board continued to meet in an unofficial capacity and has since returned to office. An independent auditor was eventually hired to evaluate the Ontario government's funding formula and to recommend action. The auditor's report, titled the *Rozanski Education Report*, was released in late spring 2003. It acknowledged that the schools, particularly in the large urban school districts, did need more money. Finally, in September 2003, the province gave additional funding to the OCDSB to cover the deficit and to provide some extra funds for the year ahead. Much damage had been done to the district and to the strategic planning process.

IMPACT OF THE FUTURE SEARCH ON STUDENTS, SCHOOLS, AND EDUCATION

The future search and priorities for actions had a major impact on the students, the individual schools, and the education system in Ottawa–Carleton. Following are Jim Grieve's reflections on the process.

Future search had a huge impact on students that can be demonstrated by some very specific and measurable outcomes. A fairly large number of students have traditionally been at risk of school failure. By developing the "school as a hub" concept, for example, we brought medical and mental health workers right into the school where they could help students and their families.

One idea behind the hub is to make a difference in how children feel about themselves, and how they engage with others at school. There was a significant impact on their readiness for school. This came up fairly dramatically on behaviour statistics, especially in terms of reduced absenteeism and suspension rates at school. These are proxy measures for how well children are relating to one another. Within two years you could see a difference in absenteeism and suspension rates. Given another five years, I am convinced we will see major positive results.

In terms of impact on the community, the future search really helped bring different communities together. For example, systems for delivering programs and services tend to be entrenched in their own activities. We asked them not so much to spend more money, but to come into the education system and deliver some of their programs right in the schools.

As a leader, future search directly impacted how I work. When I interviewed for my current job with the Peel District Board of Education, I committed to spend a full day every week in the schools, a good two hour visit to each school in our fast growing district to talk to students, principals, custodians, secretaries and parent volunteers. I now spend 20 percent of my time in schools because I value the advice I get from teachers, principals, and staff. I've added to my school visits monthly focus groups with teachers, monthly focus group with support staff, and one with school council chairs. None of these meetings has an agenda. I just start with several questions: "What brings you joy?" and "What are your issues?" I also spend a lot more time meeting with leaders in the community—the police, Children's Aid Society, social services, and mayors. I've established a Community Education Council, inviting all organizations that provide services and funding for children to come together. This is a once a month breakfast meeting. I do the same with business leaders in our community. They give me an ongoing sense of what is going on in the community. I feed this back to the trustees, who appreciate it. The feedback from teachers, principals, superintendents, and parents is extremely valuable. Again, all of this is a direct result of seeing the power of the community coming together.

CONCLUSION: A WAY FORWARD

In October 2003, provincial elections brought a new political party to power. The new premier of Ontario has formed his cabinet and named a Torontonian, Gerard Kennedy, to the post of minister of education. We're awaiting news on what policy and program changes are likely from this new government. At the municipal level, elections in November 2003 brought a new slate of school board trustees to office. A new director has been hired. An important challenge for him is to reestablish the strategic planning process by working together with the trustees. The question is how to revitalize the process that had just begun to work effectively from 2000 to 2002. The trustees need to recommit to the long-range planning objectives and get the strategic plan back on track. While there are always new issues, the director and the trustees need to balance the short-term, often very political concerns with a focus on the future. One important objective is to ensure the public education system in Ottawa–Carleton continues to maintain and expand its market share of student enrolment in the



face of growing competition from private schools. To stay fully aware, there is a requirement to be out in the community and to commit the time, effort, and funding needed to hold regular meetings with key stakeholder groups from teachers to businesspeople.

Now perhaps the conditions are right again to continue to build on the foundation of the future search action areas that were translated into clear-cut objectives in the board's strategic plan for 2000–2003. The hope is that these plans and the efforts they stimulated and encouraged will be revived by the new director and board of trustees of the OCDSB.

