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DUFFERIN-PEEL CATHOLIC DISTRICT SCHOOL BOARD
AND IT’S BUDGET CONCERN

A DESCRIPTIVE STUDY

MARIO PASCUCCI

SUBMITTED IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS FOR THE
DEGREE OF MASTER OF EDUCATION

NIPISSING UNIVERSITY
FACULTY OF EDUCATION
NORTH BAY, ONTARIO

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Abstract

This qualitative thesis studies the events that led the Dufferin-Peel Catholic District school board submitting an unbalanced budget to the Ontario Ministry of Education in contravention of the education act. It also addressed the subsequent actions that led to the appointment of the Chair of the Co-Management Team by the ministry of Education.

It studies the actions of the Dufferin-Peel Catholic District School Board Trustees and stakeholders within the above context. This thesis draws its research from various media articles including reports from numerous public meeting minutes, articles, news releases, provincial and non government studies and including interviews with stakeholders, with and without children within the school system. The methodology used the qualitative, chronological, and analytical data collection technique.

The thesis research includes information to February 07, 2007. This is a few days after the date that the Ministry of Education took over the Financial and Administrative control of the Board. The school board still maintained the issue of Denominational control. It will also draw on my personal experience of 24 years as Trustee on the Dufferin-Peel Catholic District School Board.

It offers suggestions on how the Ministry of Education can minimize the impact of limited education budget dollars today and in the future.

There is agreement with stakeholders that money is not the solution because the problems are inherently systemic.
Acknowledgement

To my wife Maria Pascucci, for her incredible patience, support and encouragement to complete this personal milestone. I Love You.

To my sons, Stefano Pascucci and Daniel Pascucci, who supported me with their constant urging and asking me, “how is it coming along?” I am behind you in your chosen careers. Stefan and Daniel, thank you for the laughter and incredible memories.

To Dr. Kristian Kirkwood and his exceptional patience, humour, encouragement. He was always there to answer my questions. A heartfelt thank you.

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To Loretta Antilope for your typing skills, constant smile, and laughter. You made it fun and an incredible learning journey.

To Nipissing University for challenging and allowing me to grow. The professors and support staff were always helpful.

To my fellow Trustees that I have had the pleasure to work (past and present).

To all employees at Dufferin-Peel that have been patient with me over the years while I asked the countless questions that were answered in a timely and complete manner.

To my constituents that have given me the honour to serve over 25 years, encompassing nine terms. I am thankful of your support and appreciative for the opportunity to serve the community. Serving one’s community is an honour and a privilege.
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CHAPTER ONE: INTRODUCTION

John Ruskin, 1819-1900

The first duty of government is to see that people have food, fuel and clothes.

The second that they have a means of moral and intellectual education.

Background

It has been an honour to serve on the Dufferin-Peel Catholic District school board for nine terms. The constituent, being a separate school elector within specific ward(s), directly elects the individual to the office of Separate School Trustee every 4 years. I am now into my 24th year in municipal politics and now the longest serving member on the Dufferin-Peel Catholic District School Board.

The Trustee is the spokesperson and represents the needs of the particular ward. The ward constituents include parents/guardians, students, and ratepayers. The Trustee, when making their administrative and financial decision(s), must consider the impact on their own ward(s) and the entire jurisdiction of the school board.

Responsibilities of the Separate School Trustee include the following:

• Adhere to Education Act and to its regulations;
• Achieve balanced budgets as required by the Education Act;
• Ensure Ministry curriculum is delivered;
• Prepare and present educational seminars to parents, guardians, and ratepayers;
• Advocate for parents/guardians, taxpayers, and stakeholders at the school and school board levels;
• Negotiate labour contracts;
• Meet the religion’s tenets as determined by the Roman Catholic Church;
• Defend the right to exist as established in the original British North America Act (1867).

• Trustees must also work with city councillors, members of the provincial legislature, and members of the federal parliament.

The experience gained over the years is a direct result of my proactive approach to regularly meet with constituents and address issues that are timely and that serve the greatest number of stakeholders. This approach is required to achieve an effective and efficient school board system. It has always been a personal objective to be a member of policy-oriented committees. I have been Chairperson of profile committees such as Administration and Finance; Audit Committee, Policy and Resolution Committee, and the Faith and Program Committee.

When first elected as Trustee in Ward 5 (Malton, Ontario) in 1978, the budget was about $60 million to educate 29,000 full-time students (FTE). In comparison today, there are approximately 83,000 FTE students supported with a budget of almost $700 million.

DPCDSB is the ninth largest school board in Canada. It is the second largest Catholic school board in the province of Ontario and the fifth largest school board in Ontario. The infrastructure to meet the educational needs of 83,000 students requires approximately 10,000 employees, of which 5,500 are teachers. There are 121 elementary schools and 23 secondary schools, called “plants.” The boundary of DPCDSB extends from the south (Lake Ontario) to the west (the Oakville/Mississauga border), to the north (town of Orangeville/Shelburne), and to the east (the Etobicoke/Mississauga border).
The First Election

In 1978, my election campaign platform was to support the introduction of the Heritage Language Program (now called International Languages) to DPCDSB. Malton in 1978 was an ethnically (primarily European) and linguistically diverse area. The constituents supported this initiative of teaching their children the significance of cultural and linguistic background of the parents/guardians’ homeland in schools. The government financially supported the program. I served as a Trustee from 1978 to 1980 for the Malton area, Ward 5. In the December election of 1980, I lost my reelection bid for election in Ward 5. I ran for reelection to the school board for Ward 3 in 1982 and was successful.

I represented Ward 3 as a Trustee until 1997. In 1997, the Ontario Progressive Conservative provincial government disqualified anyone married to a teacher or an individual employed as a teacher in Ontario. My wife was a teacher, and the government disqualified me from being elected as a Trustee. The act was challenged, and the courts did not support the government. In December 2000, I was acclaimed to the position of Trustee for Wards 1 and 3.

I began my course of study at Nipissing University, M.Ed. Program in an attempt to address education from an educational and administrative perspective. I did not realize that within 2 and a half years, this Trustee would be involved and in the forefront in addressing the issue of underfunding at the DPCDSB in particular and in Ontario in general. DPCDSB would soon become the focal point for the government and in the media on the topic of underfunding of education in the province of Ontario. It is
interesting that over the years DPCDSB and other school boards in Ontario continued to press the Ministry of Education about addressing a solution to the concern on funding of education, in other words, a funding modal that addresses the real costs of education of every school board in Ontario. To address the funding shortfall, a number of school boards used reserves over the many years to cover local shortfalls in funding of education.

*The Ontario Government*

The Ontario government has spent almost $17.5 billion for education funding during years of 2005 and 2006. The funds support 72 school districts and 33 school authorities in Ontario. There are 31 public school boards, 29 Catholic school boards, 4 French public school boards, and 8 French Catholic school boards.

In Ontario, there are approximately 2.3 million students enrolled at the elementary and secondary levels. The education dollars are used to support over 4,000 elementary schools and over 870 secondary schools. There are over 112,000 teachers, of which approximately 72,000 are elementary school teachers and 40,000 are secondary school teachers.

*Early Education in Ontario*

In 1844, Reverend Dr. Egerton Ryerson was appointed Chief Superintendent of schools by Sir Charles Metcalfe. Reverend Dr. Ryerson was born in Ontario in 1803 and died in 1882. He spent 2 years researching an educational system that would benefit the province. The basic theme that emerged from his research was that elementary education should be available for all students.
In 1850, the school board was renamed the Department of Public Instruction. In 1876, the name was changed to Department of Education; and in 1932, the name was changed to the Ministry of Education.

Reverend Dr. Ryerson’s major contribution to the education system in Ontario from a historical perspective was the school Acts of 1850 and 1871. The rules that he established were rooted in God and the British Empire.

In 1850, the Common school Act for Upper Canada was created, and a school board of three elected Trustees administered each school section. The three Trustees were responsible for hiring teachers, administering finances, and the management of school property and equipment.

Since 1978, there have been 16 Ministers of Education, three of them in the last year (2006). Education concepts were changed often during the term of each Minister, making it difficult for the stakeholders in the provincial system to adjust. The names of the Ministers of Education since my first election as Trustee to the DPCDSB are:

- Keith Norton, P.C.–1985 (4 months)
- Lawrence Grossman, P.C.–1985 (2 months)
- Sean Conway, Liberal–1985-1987
- Sean Conway, Liberal–1989-1990
- Dave Cooke, N.D.P.–1993-1995
• David Johnson, P.C.–1997-1999
• Janet Ecker, P.C.–1999-2002
• Elizabeth Witmer, P.C.–2002-2003
• Gerard Kennedy, Liberal–2003-March 2006
• Sandra Pupatello, Liberal–March 2006 to September 2006
• Kathryn Wynn, Liberal–September 2006 to present

The First Budget Warning

DPCDSB budget concerns began on March 5, 2004. The Associate Director of Corporate Services initiated the current underfunding issue when he issued a briefing report to the MPPs within the jurisdiction of DPCDSB. The intention was to bring forward and highlight the funding issue for serious consideration by the Ministry of Education.

The Ministry of Education were sent a number of letters from DPCDSB outlining the concerns of the school board. These letters were requesting that the Ministry concern themselves regarding a potential funding shortfall that could lead to deficits by the school boards of education in Ontario in general and DPCDSB in particular. DPCDSB encouraged the Ministry of Education to establish a real cost funding model.

The DPCDSB concerns were outlined in the following chronology of events:

March 5, 2004    MPP Briefing Report, issued by Associate Director of Corporate Services at DPCDSB

March 10, 2005   Strategic hiring freeze
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<td>May 27, 2005</td>
<td>Meeting with Ministry staff (Nancy Naylor, Wayne Burtnyk, T. Miller, J. Kostoff, J. Fitzgibbon, and finance staff)</td>
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<td>June 14, 2005</td>
<td>Request from the school board that the Chairperson meet with Minister of Education</td>
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<td>June 22, 2005</td>
<td>Notice to all Dufferin-Peel MPPs from school board Chairperson</td>
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<td>July 26, 2005</td>
<td>Report to the Administration and Finance Committee on school board concerns</td>
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<td>August 10, 2005</td>
<td>Meeting with Deputy Minister (M. Bator, J. Kostoff, J. Watts, J. Fitzgibbons)</td>
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<td>August 11, 2005</td>
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<td>September 12, 2005</td>
<td>Special school board meeting, Administration and Finance</td>
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<td>September 20, 2005</td>
<td>Transportation meeting with Ministry staff</td>
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<td>September 29, 2005</td>
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<td>October 17, 2005</td>
<td>Report sent to the Ministry for comments</td>
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<td>October 24, 2005</td>
<td>Acknowledgment by the Ministry of DPCDSB staff minutes</td>
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<td>October 25, 2005</td>
<td>School board updated</td>
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<td>November 27, 2005</td>
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December 2005  School board launches postcard campaign titled, “Mr. Premier, Help Us, Don’t Hurt Our schools”–33,000 signed cards received from parents/guardians. Represents about 15% of population
Delivered to the legislature directly to an MPP
Filed revised budget estimates--$15 million deficit
Minister Kennedy proposes working committee to review issues

January 2006  Working Committee meets twice and discontinues. Issue of funding not resolved

February 2006  Minister Kennedy sends open letter to parents, posts same letter on Ministry website; letter is concerning financial status of DPCDSB. Minister sends special investigators to review DPCDSB finances

April 2006  Investigator’s report released. It is critical of school board but acknowledges underfunding for the first time. States that school board is providing an excellent level of service to its community and doing many “great things” for its students

April 2006  Kennedy resigns. Sandra Pupatello installed as new Minister of Education
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<td>June 2006</td>
<td>Province appoints Peter Lauwers as Special Advisor to work with school board to develop a deficit management plan</td>
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<td>September 2006</td>
<td>New Minister of Education, Kathryn Wynn, replaces Sandra Pupatello</td>
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<td>September 2006</td>
<td>After a series of special public meetings and Trustee approval of millions in cuts, Trustees refuse to make further cuts as outlined in Deficit Management Plan B. The school board cites that additional cuts would balance the budget but hurt students</td>
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<td>October 2006</td>
<td>Province appoints Norbert Hartmann as Chair, Co-Management Team. The objective is to balance the budget. Seeks two Trustees to sit on team. Trustees refuse</td>
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<td>November 2006</td>
<td>New school board elected. All but one Trustee from previous school board are returned with substantial electoral margins. Five new Trustees elected</td>
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<td>January 30, 2007</td>
<td>School board rejects Norbert Hartmann’s repeated overtures to participate on co-management team and make cuts</td>
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<td>February 5, 2007</td>
<td>The province, through Norbert Hartmann, removes financial powers from Trustees. Trustees made responsible only for denominational issues</td>
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Trustees during the above period(s) to November 2006 made an annual income of $5,000 per year for services to their community. The previous government, by decreasing the annual remuneration, may in fact have created lobbyists for the education system. The individuals that stayed to challenge government were there with a purpose to succeed in supporting student education and not for personal financial gain.

The Ministry Response

The Ministry had attempted early in the process to suggest that poor financial management was the cause of the budget deficit. The DPCDSB position was that the deficit was due to a flawed and historic funding formula problem that did not recognize the true cost of education in DPCDSB. The three areas that were primarily cited by the school board were transportation, salaries, and special education. The investigators from the Ministry commented in their report that the management staff at DPCDSB was very accommodating when requests were made for information. Their report also stated that underfunding was an issue.

The Ministry did not want to reflect on the historical perspective and suggested that the school board look forward in its approach to expenditures. The school board position was that history was the crucial element and that historic underfunding was the root cause of the current budget dilemma.

DPCDSB Budget Concerns

DPCDSB was also attempting to garner support from other school boards, associations, and the media.
DPCDSB asked in June 2005 for a meeting with The Honourable Gerard Kennedy. The DPCDSB on May 24th, 2005 passed a unanimous motion that was sent to the Honourable Gerard Kennedy by the Chair of the school board:

That the Province of Ontario, through the Ministry of Education as sole financier for education, readdress the imbalance between:

a) The provincial benchmark and the actual cost of salaries and benefits;

b) The provincial funding of special education and the actual cost of special education expenditures;

c) The provincial funding of school transportation and the actual cost of transporting students. [Emphasis added]

The motion further read:

d) That the DPCDSB request a meeting with the Minister of Education to discuss the school board’s extreme financial situation in 2005-06 and beyond, subject to the SBOG impact on the financial health of the school board. [Emphasis added]

The letter further states:

The DPCDSB requests an urgent meeting with you and your staff to discuss the school board’s financial situation as we proceed to prepare the 2005-06 budgets. The school board anticipates a significant deficit in 2005-06 that in previous years has been offset by reserves. The school board’s non-dedicated reserves have been used up so there are no reserves available to address this anticipated deficit. This “structural deficit” is rooted in the funding gaps found in three key areas:
1) the differential between the provincial salaries and benefits benchmark and the school board’s actual cost;

2) the differential between the funding of special education and the school board’s actual cost to deliver programs and services;

3) The differential between the provincial funding benchmarks established for transportation in 1998 and the school board’s actual cost to deliver the service [Emphasis added].

There were 13 areas that the school board wanted to address in the August 2005 report to the Ministry:

- 2005/2006 projected gap in salary and benefit funding;
- Cost of negotiated settlements;
- Salary gap for non teaching staff;
- Underfunding in special education;
- “Freezing” of transportation funding level to 1997 levels;
- Inadequate level of transportation funding;
- Transportation expenditures resulting from capital plan for new schools and renovations that were not recognized as a pupil accommodation expense;
- Local priorities;
- 2005/2006 elementary preparation time;
- Average pupil credits;
- Secondary average class size;
- Support for transparency and stability report;
- Miscellaneous underfunding by the Ministry.
Statement of the Thesis Problem

1. What events led DPCDSB to be in a position where the Ministry of Education appointed the Chair of Co-Management Team?

2. What impact have these events had on the stakeholders?

3. How to resolve the problem of educational funding in the province of Ontario?

Significance to Education of the Thesis Problem

There has been an issue of education funding from the earliest days of Ontario education to and including the present day. This situation brought to the attention of the Ontario education scene issues that affected DPCDSB and potentially every school board in Ontario. The budget concerns will in all likelihood continue to be an issue into the near future.

The significance to education of the thesis problem is that there must be a sustained funding formula that will address the extraordinary differences experienced by all school boards across Ontario. DPCDSB actually became the “lightning rod” that drew public attention to this issue.

The document titled “Turning Point? Time to Renovate Ontario Education MacKenzie Funding Formula” (MacKenzie 2006) prepared by the Canadian Centre of Policy Alternatives states that the issue of underfunding would be no different this year from years past. The provincial government claimed to have spent more that $600 million this year compared to last year. School boards continue to state that the money is not enough and that the Ministry’s objectives cannot be met at local levels with the current method of funding formula.
The money has run out! There have been many years when a number of school boards, and the DPCDSB being one of them, have used reserve funds to support the cost of education. In fact, a number of school boards continue to use their reserve funds to balance their respective budgets. The Education Minister, Kennedy, claimed that poor financial management was the problem at DPCDSB. There were comments made on how a school board, without sustained support for the reserve fund could be so short-sighted as to use the funds to support education. The Ministry was in fact short-sighted in this opinion. The school board was using the reserve funds as a method of bridge financing until the funding model would change. It was also used to meet the requirements and initiatives determined and set by the Ministry. The Liberal government made the promise of a funding model change during their 2004 election campaign. The funding model did not and has not changed substantially over the last 3 years as expected by the school boards. The school boards over the last few years were actually “gambling” with unknown variables. The challenge was to get more money from a government that had repeatedly claimed that it would fix the funding formula.

The “Turning Point?” (MacKenzie, 2006) document makes a point that in fact both sides are telling the truth (p.#5). There has been more money forwarded to education, but not nearly enough to cover the cost of education. The Turning Point? document reviews the educational funding program on a province-wide basis.

The financial pressures that the school boards have had to bear over the years according to the Turning Point? document are paraphrased below:
• The new provincial initiatives and commitments, which require additional spending by school boards, will increase by more than the overall increase in operation funding.

• Provincial initiatives and commitments related to primary class size, specialized elementary teachers, student success teachers in high school, and the 2.5% increase in the provincial salary framework will require $528 million in funding. The total operating funding has increased by only $490 million. There will be a $38 million shortfall for school boards. This money will be drawn from other areas. The salary component increases a few years ago were incurred in an attempt to achieve “educational teaching peace.”

• There has been an attempt to achieve funding neutrality, but the piecemeal funding approach has not achieved the desired results.

• The increased allocation for teachers’ salaries was offset by cuts to local priorities and for students at risk through the Learning Opportunities Grants (LOG) funding. Based on the funding changes of LOG grants, some school boards will be affected differently. The effect on the school boards will depend on their size and their previous status on LOG funding.

• The formula does not provide for cost increases in areas other than teacher salaries. The benchmarks have been increased by 2.5% to reflect the provincial teacher salary framework, but other benchmarks have been either frozen or not adjusted to the rate of inflation.

• Special funding for school boards with declining enrolment has been reduced.
• The declining enrolment grant was cut from the 2005-2006 budget year to the 2006-2007 year from $125 million to $65 million.

• The 2006-2007 funding formula does not take into account the extraordinary one-time expenditures by school boards to balance their 2005-2006 budgets.

• Some school boards deferred one-time expenditures from the 2005-2006 to 2006-2007 budgets. There was no funding recognition by the Ministry.

• The Turning Point? document noted that the Ministry’s own website acknowledged that 12 out of 72 school boards were expected to file deficits in 2004-2005.

  The school board’s funding problems in 2006-2007 can be traced back to 1998-1999, when the funding formula took effect.

• School operations and maintenance are underfunded compared to 1997 costs by more that $350 million.

• Adult credit courses are underfunded relative to the same courses taught to secondary school students. This amount is $125 million.

• Learning Opportunities Grants are $250 million short below recommended levels by the “Expert Panel” that actually set up the grants.

• English as a Second Language (ESL) funding is not properly linked to the additional education needs of students whose first language is not English.

• Special education funding in the past was driven by actual individual needs, but now the needs of these students are determined by how much there is available in the Ministry budget.
• There is no funding formula to meet the needs of local priorities. The document states that every study of education funding in Ontario has recommended a local priorities allocation of 10% of the operating fund. This would be funded from local property taxes or provincial supplement.

• The definition of education as it relates to the areas below is not addressed in the funding model:
  o Specialized educational facilities.
  o Community infrastructure.
  o Programs such as school breakfast and lunch.
  o Parental engagement support.
  o Role of educational assistants in classrooms.
  o The role of school as an access point to the public services.

  The significance to education of the thesis problem is that underfunding of education has been systematic in Ontario. There must be an equitable financial resolution found to meet the needs of school boards attempting to deliver ministerial directives while meeting local requirements.

  There must be an agreement that everyone is together for the education of Ontario students!

  It is recognized that funding of the education system in Ontario is primarily forwarded to the school boards in the form of 23 “financial envelopes.” These envelopes hold the ministerial predetermined amount of funds that a school board is able to spend in any given particular category. Most of these funds are directed only for that specific category. This is forcing school boards to spend the envelope money in a designated
manner and has removed the ability to locally determine what is best for its own jurisdiction. There is no flexibility. The right to tax locally (mill rate) has also been removed from local school boards’ responsibility.

DPCDSB is no different from the other school boards of Ontario. Although one of the largest school boards in Canada, it is considered an education leader in Ontario in ensuring that DPCDSB students have an education that is the best.

*How Did DPCDSB Get Into This Situation?*

The significance to education of the thesis problem is to ensure that in fact adequate sustained funding is available to all school boards. This report is specific to DPCDSB; however, all school boards in Ontario at one time or another in the next 5 years would probably be in the same position if it had not been for DPCDSB and its local initiative.

How did DPCDSB get into this situation? Was it in fact underfunding by the Ministry or the mismanagement of the school board’s resources? Was it due to the initiative to meet the required needs of the students and the population within DPCDSB including staff? Could it be that the education initiatives that were started and required by the Ministry of Education that offer “start up” initial funding but do not offer ongoing funding caused the deficit?

The significance to education of the thesis problem is to highlight the fact that many school boards may find themselves in this position in the near future. This thesis addresses the potential manner of funding school boards while meeting their local initiative needs, the requirements as determined by the Ministry of Education, and the adherence to the Education Act of Ontario.
What events led DPCDSB to be in a position where a government supervisor has been assigned?

*Cause of the Deficit: Historical or Mismanagement*

This question is in fact historical. The Ministry, at the beginning of this investigative protocol, refused to look at past events, commenting that a number of that history had in fact set the stage for this problem to occur.

The Ministry first cited poor financial management as the cause. The school board, to counteract this comment, hired its accounting firm to conduct a forensic audit on its practices. The final report from the accounting firm Deloitte and Touche stated that all funds were accounted for and the funds were spent as required by the Ministry of Education and the Education Act. It appeared that the Ministry did not want to acknowledge that underfunding was an historical issue but a mismanagement issue.

The media began to notice the concerns of the school board. There were a number of articles that supported the school board concerns. The Trustees visited schools and provided a background to the situation.

It was evident that the Ministry was overwhelmed by the resolve of DPCDSB. This school board in the past would meet the requirements of the Ministry and quietly address situations. The school board sent over 35 letters to the Ministry, for which they are still waiting for a reply. This lack of response frustrated school board staff and the school board of Trustees demanded that they receive replies to critical questions. The MPPs within the Dufferin-Peel jurisdiction on March 5, 2004, were provided with a summary book delineating all concerns, outstanding copies of letters requesting replies,
and issues of the school board. It was hoped by the Board that these concerns would be addressed by all the MPPs.

The first profile meeting occurred May 27, 2005, when senior staff met with ministerial staff to address areas of concern.

There was little to no reaction from the meeting by ministerial staff. The June 14, 2005 school board meeting formalized a request that the Chairperson of the school board meet with the Minister of Education. The response time from the Ministry was unacceptable, and a letter went to all MPPs within the DPCDSB jurisdiction on June 22, 2005.

The issue came to the forefront due to timing necessary to file estimates for budgets in August. It was in July 2005 that the school board received a report from its Administrative and Finance Committee outlining the budgetary concerns.

On August 10, 2005, senior staff met with the Deputy Minister. The result of the meeting was the agreed filing of estimates on August 11, 2005. These estimates were needed to meet the deadlines outlined by the Ministry of Education to ensure compliance with the Education Act. The DPCDSB was determined to meet the spirit of the Education Act and its regulations.

A special school board meeting was convened on September 12, 2005, and the school board of Trustees was provided budgetary information and updated on the three major areas of concern. The areas were (in no particular order), Transportation, Salaries, and Special Education.

It was then suggested that the three areas would be presented separately to the Ministry by DPCDSB senior staff.
There were meetings with Ministry staff in three areas:

- September 20, 2005: Transportation
- September 23, 2005: Salaries and Benefits
- September 29, 2005: Special Education

The background for each of these areas is provided below:

**Underfunding and Transportation**

The following summarizes the presentations and reports provided to Ministry staff on the topic of transportation.

In a letter from DPCDSB during mid summer 2005, the Ministry was presented with concerns relative to transportation. The letter summarized that the funding model of transportation framework was established using 1997 data. The data that were used by the Ministry were in fact detrimental to the DPCDSB.

In 1996, the DPCDSB and the Peel Public school board successfully merged the two transportation systems to drive cost efficiencies within the Peel Region. They were successful in achieving the first year a savings of about $400,000 for DPCDSB and $800,000 for Peel. A new funding model was introduced in 1998. The funding model addressed the issue of cost based on the efficiency that had already been achieved by DPCDSB and the Peel Public school board. Consequently, the school boards were in fact penalized as a result of their efficiencies.

The consortia were addressed in the document submitted by the Ontario Catholic School Trustees Association. They submitted recommendation 10, which read:

That the Ministry of Education review and refine its transportation reform policy, as set our in SB: 13.
• to broaden the definition of acceptable transportation consortia to include a spectrum of co-operative transportation arrangements,
• to enable English-language school boards that meet the provincial standard of efficiency and effectiveness to continue to deliver transportation service independently; and
• to include the right to withdraw from a consortia in the dispute resolution process, as the final step.

In Table 1, it is obvious that DPCDSB was not funded to the level of the Peel school board. The irony is that the children rode the same bus, breathed in the same air (exhaust), and that DPCDSB actually ran the system. The buses were double and triple routed whenever possible to achieve financial and routing efficiencies.

Summary: Insufficient funds are provided covering the true cost of transportation

In 1994, the transportation cost per student was $199.79 as seen in Table 2. In 1995, it was $197.29. In 1996, it was $190.39 and in 1997, it was $176.46. There has been inequity in transportation funding since the new funding model started. Even though despite year after year increases in total transportation costs, DPCDSB continues to suffer with lack of equitable funding compared to the Peel District school board in this important envelope.

At present (2006), DPCDSB students receive in grants on average $197 and Peel District school board receives grants of $209.
Table 1

Transportation Grant Comparison

<table>
<thead>
<tr>
<th>School board</th>
<th>Number of students</th>
<th>Transportation grant per student</th>
<th>Expenditure per student</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPCDSB</td>
<td>82,129</td>
<td>$182</td>
<td>$219</td>
</tr>
<tr>
<td>Peel</td>
<td>131,343</td>
<td>$195</td>
<td>$251</td>
</tr>
<tr>
<td>York DSB</td>
<td>99,490</td>
<td>$292</td>
<td>$287</td>
</tr>
<tr>
<td>Durham</td>
<td>65,843</td>
<td>$277</td>
<td>$245</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
Summary: Transportation at DPCDSB does not receive equitable funding on a per student basis compared to the co-terminus school board or the province

A comparison of Ministry allocation and school board expenditure for students acknowledges the net deficit to the school board in the transportation envelope from 1998 to 2005.

In the same year, the Ministry was provided information on the Edulog software program that allowed both DPCDSB and the Peel school board to optimize the transportation system. The Ministry was told that the Peel transportation consortium ran system wide 5.89 runs per day or 2.45 runs per a.m. and 2.44 runs per p.m. as well. The Ministry was also advised that the business system optimized its runs with a minimum of “deadheading.”

Summary: DPCDSB with Peel District school board runs an efficient and effective transportation system

The Ministry was also advised that there has been no recognition of the added costs for DPCDSB that has been achieving rapid enrolment increase. There was an imbalance in the distribution of funding to our school board since 1997.

Summary: There has been no recognition by the Ministry of Education of the additional costs due to the rapid increase in enrolment in the jurisdiction.
Table 2

Transportation Cost per Pupil – 1994 to 1997 (pre funding model)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation expenditure</td>
<td>$13,585,241</td>
<td>$13,805,092</td>
<td>$13,618,688</td>
<td>$12,976,302</td>
</tr>
<tr>
<td>Enrolment</td>
<td>67,996</td>
<td>69,972</td>
<td>71,532</td>
<td>73,537</td>
</tr>
<tr>
<td>Transportation cost per pupil</td>
<td>$199.76</td>
<td>$197.29</td>
<td>$190.39</td>
<td>$176.46</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
## Table 3

**Transportation Deficit, 1998-1999 Through 2004-2005**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Allocation</th>
<th>Total expenditures</th>
<th>Net deficit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998-1999</td>
<td>$12,044,706</td>
<td>$13,127,972</td>
<td>($1,083,266)</td>
</tr>
<tr>
<td>1999-2000</td>
<td>$12,270,984</td>
<td>$14,512,950</td>
<td>($2,241,966)</td>
</tr>
<tr>
<td>2000-2001</td>
<td>$12,690,354</td>
<td>$16,787,708</td>
<td>($4,097,354)</td>
</tr>
<tr>
<td>2001-2002</td>
<td>$12,977,728</td>
<td>$16,893,275</td>
<td>($3,915,547)</td>
</tr>
<tr>
<td>2002-2003</td>
<td>$14,032,715</td>
<td>$17,223,425</td>
<td>($3,190,710)</td>
</tr>
<tr>
<td>2003-2004</td>
<td>$14,469,280</td>
<td>$17,843,559</td>
<td>($3,374,279)</td>
</tr>
<tr>
<td>2004-2005</td>
<td>$15,210,066</td>
<td>$18,132,888</td>
<td>($3,012,822)</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
During early fall in 2004 a letter was forwarded to the Ministry of Education from the GTA-905 Transportation Funding Review Committee to formally state their concerns for the new transportation model. Their concern about the model addressed the following:

- The model does not meet the objective of treating all school boards equitably.
- The primary factor for funding distribution uses the home-to-school measurement.
- There is a distortion of the distribution of funds among urban and rural school boards.
- The model did not meet the guiding principle set out by the Ministry.
- The model does not provide adequate resources to school boards to address student transport needs in the jurisdiction.
- Model does not permit flexibility for the school boards in transportation decisions.
- The savings that were anticipated were squeezed out in the previous 6 years due to restricted underfunding.
- Implication of the service model would cause concerns for the stakeholders that depend on transportation.

Their summary comment was that the new funding model should reflect the realistic costs for a standard level of service.

In 2004-05, the Ministry promised a new transportation funding model. The objectives of the new approach in the transportation discussion paper were to provide sufficient funding to ensure reasonable service, allocate funding equitably, recognize differences in needs, and address factors beyond the control of school boards and
encourage school boards to work together to achieve efficiencies. The school board is waiting!

Summary: A true cost of running a transportation system does not reflect the funding model.

In a letter during the first quarter of 2002, the Ministry of Education recognized the need to address transportation cost pressures. These cost pressures was addressed by:

• Annually adjusting the base grant to reflect enrolment changes.

• Special funding allocations to:
  
  o Offset fuel price increase.
  
  o Recognize the impact of declining enrolment.
  
  o A software loan acquisition program for which Peel and DPCDSB received $450,000.

Summary: The Ministry made an attempt to address transportation needs.

The DPCDSB was served another financial blow by the Ministry not recognizing the transportation costs that were incurred to deliver children to holding schools due to the extensive capital campaign made necessary due to increased growth and refurbishing of schools (Table 4). Since 1997, the DPCDSB had incurred expenditures in excess of allocation totalling $9,200,000. The amount of $2,120,000 was incurred by the school board due to transportation of students to holding schools.

The DPCDSB has repeatedly asked the Ministry to apply Pupil Accommodation Grants (PAG) for transportation costs to holding schools. It was argued that these costs were part of the construction costs when building or renovating a school.
DPCDSB has incurred extraordinary expenses due to moving students to a holding school in Streetsville, Mississauga, and to Brampton. This was done to ensure the safety of the children. In a number of cases, the schools were completely demolished and reconstructed. It is unacceptable to believe that the Ministry of Education would permit students to be taught on a vacant lot.

*Summary:* The Ministry of Education does not recognize the extraordinary costs of transporting students when schools are under renovation or reconstructed.

DPCDSB Special Education students make up 10% of the ridership but utilize over 30% of the budget. The Ministry provided a base allocation of $1,000 per student. This amount is insufficient compared to the actual costs. The students in Care and Treatment Programs (section 20) do not receive the appropriate funding for transportation services.

The Ontario Catholic Separate Trustees Association (OCSTA) in their “in Support of Student Success-Refinements to the funding formula” response (2006) stated that particular attention must be given for transportation of students with special needs. There is no special funding for these services, and consideration should be given due to the unique situations when the formula is developed.

*Summary:* The Ministry of Education at that time did recognize the true cost of transporting students with special needs.
Table 4

Holding School Transportation Expenditure

<table>
<thead>
<tr>
<th>School</th>
<th>Holding school</th>
<th>Relocation period</th>
<th>Reason</th>
<th>Transportation expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Catherine of Sienna</td>
<td>Streetsville holding school</td>
<td>01/00-12/00</td>
<td>Demolition &amp; reconstruction</td>
<td>$359,000</td>
</tr>
<tr>
<td>St. Martin S.C.</td>
<td>Streetsville holding school</td>
<td>09/00-06/01</td>
<td>Renovation</td>
<td>$448,000</td>
</tr>
<tr>
<td>Queen of Heaven</td>
<td>Streetsville holding school</td>
<td>01/01-12/01</td>
<td>Demolition &amp; reconstruction</td>
<td>$162,000*</td>
</tr>
<tr>
<td>St. Paul S.S.</td>
<td>Streetsville holding school</td>
<td>09/01/-6/02</td>
<td>Renovation</td>
<td>$310,000*</td>
</tr>
<tr>
<td>St. Francis of Assisi</td>
<td>Streetsville holding school</td>
<td>01/02-06/02</td>
<td>Renovation</td>
<td>$78,000*</td>
</tr>
<tr>
<td>St. Mark</td>
<td>St. Aloysius Gonzaga S.S.</td>
<td>09/01-06/02</td>
<td>Renovation</td>
<td>$105,000*</td>
</tr>
<tr>
<td>TOTAL:</td>
<td></td>
<td></td>
<td></td>
<td>$1,462,000</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005

**SUMMARY BY school YEAR:**

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999-2000</td>
<td>$264,000</td>
</tr>
<tr>
<td>2000-2001</td>
<td>$640,000</td>
</tr>
<tr>
<td>2001-2002</td>
<td>$558,000*</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>$1,462,000</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005

*projected expenditure
The Ontario Catholic School Trustees Association (OCSTA) reported their concerns to the Ministry of Education on November 17, 2006. The report (p.#13) was in response to the Ministerial document titled “in Support of Student Success- Refinements to the funding formula.”

Their comment was that the OCSTA welcomed the increase in funding for student transportation in the 2006-2007 grant announcements. The funds would total $18.5 million and would fund higher enrolment, fuel, capital and operating costs, as well as special funding for driver first aid and CPR training.

The OCSTA made known the fact that Catholic school boards tend to serve larger areas than the public school boards because there are fewer schools. They also commented that Catholic school boards tend to allocate more funds for transportation than public school boards do.

Their report continued that a new model for transportation must be found to provide a reasonable level of service. The allocation must be fair and non discriminatory. The model should treat school boards and all students fairly when similar circumstances occur with a coterminous school board.

Should there be a local priority funding for schools that have specialized schools or to meet unique (school board specific) walking requirements for students? The answer must be yes. There cannot be a one-size-fits-all model.

The OCSTA made a recommendation (#9) that read: That the Ministry of Education, in consultation and partnership with school boards and their provincial associations, immediately re-engage in the process of developing an equitable and adequate transportation funding formula that meets the actual need for student
transportation, including transportation for those with special needs. The underlying principles of equity, adequacy, autonomy/flexibility, and accountability must be recognized.

**Underfunding and Salaries and Benefits**

There has been an historical gap between funding of salaries and benefits and actual cost. [The amount for DPCDSB is $29 million for 2006-2007.]

Dufferin–Peel is unable to address this cost without affecting the funding envelopes from other areas of the school board.

The Rozanski recommendations (Rozanski, 2002) were “to update the benchmark costs for all components so the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodations Grant) to reflect costs through August 2003, and that funding reflecting these updated benchmarks costs are phased in over three years, starting in 2003-04, as part of a multi-year plan.”

The teaching staff is funded through the Foundation Grant and the Qualifications and Experience (Q&E) Grant. When addressing experience level changes at the salary or grid level for non teaching staff, the Ministry does not recognize the actual cost. DPCDSB has 35% of the school board’s complement that is considered non teaching. The fund to pay this staff is taken from local priorities grants.

The Ministry did recognize some of the additional cost when it paid an additional 2% allocation for non teaching staff in Q&E in 2005-2006. There has not been additional funding of the historical gap since 1998.
Preparation Time Differential for Elementary Teachers

DPCDSB has provided for the 4-year provincial preparation time framework that expires June 30, 2008 for 200 minutes of prep time. The province funds to only 171 minutes.

The DPCDSB has not been fully funded for preparation time at the elementary panel and has used local priority monies to offset any shortfall. The provincial salary framework introduced by the Ministry does not solve this underfunding issue. There was a Ministry memorandum in 2005, B:5, dated June 16th, 2005 (p.#17) that stated school boards are required to make up the difference between their actual preparation time and the preparation time funded by the province each year.

In 2005-06, this 10-minute differential has cost the school board substantially. At the end of the 4-year provincial framework, this framework requested by the Ministry will result in a 29-minute differential. The consideration, of course, is that DPCDSB will have to deal with this issue of the 29 minutes. The money will come from another envelope.

Table 5 (revised estimates 2005-2006) compares the costs that are incurred by DPCDSB versus Ministry funding levels.

When the elementary level is addressed, the average salary and benefits costs to DPCDSB are $75,677 per teacher. The FTE funded Foundation Grant for classroom teachers and preparation time is $2,404 per teacher. The total costs for classroom and preparation time (salary and benefits costs) is $181,938,069. The Ministry funding level is only $163,818,941. The difference is $18,119,128.
### Table 5

**Dufferin-Peel Catholic District School Board**  
**Classroom Teacher Funding and Cost Estimates 2005-2006**

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DPCDSB Costs for Classroom &amp; Prep.Time Teachers:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher Average Salary &amp; Benefit costs for DPCDSB</td>
<td>$75,677 (a)</td>
<td>$77,321</td>
<td></td>
</tr>
<tr>
<td>FTE funded by Foundation Grant for Classroom Teachers &amp; Preparation Time Teachers</td>
<td>$2,404 (b)</td>
<td>1,703</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CLASSROOM &amp; PREP.TIME TEACHER SALARY &amp; BENEFIT COSTS (a) x (b)</strong></td>
<td>$181,938,069 (d)</td>
<td>$131,640,018</td>
<td>$313,578,087</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MED Funding for Classroom &amp; Prep.Time Teachers:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation Grant funding for Teacher Salary &amp; Benefits</td>
<td>$151,458,141</td>
<td>$107,279,598</td>
<td></td>
</tr>
<tr>
<td>Q&amp;E Grant Funding for Teacher Salary &amp; Benefits</td>
<td>$12,360,800</td>
<td>$13,008,465</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CLASSROOM &amp; PREP.TIME TEACHER FUNDING</strong></td>
<td>$163,818,941 (e)</td>
<td>$120,288,063</td>
<td>$284,107,004</td>
</tr>
<tr>
<td><strong>FUNDING SHORTFALL (d) – (e)</strong></td>
<td>$18,119,128</td>
<td>$11,351,955</td>
<td>$29,471,083</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Shortfall per Pupil</strong></td>
<td>$80</td>
<td>$109</td>
<td>$91</td>
</tr>
</tbody>
</table>

Average Daily Enrolment at Estimates 2005-06  
53,013 | 29,958 | 82,971

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Other Date:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Enrolment for Estimates 05-06</td>
<td>53,013</td>
<td>29,958</td>
<td>82,971</td>
</tr>
<tr>
<td>FTE for Classroom &amp; Prep.Time Teachers Generated from Foundation Grant Chart</td>
<td>2,404</td>
<td>1,703</td>
<td></td>
</tr>
<tr>
<td>Per Pupil Funding from Foundation Grant Chart for Classroom &amp; Prep.Time Teachers</td>
<td>$2,857</td>
<td>$3,581</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salary &amp; Benefit funding in Foundation Grant Chart per Classroom/Prep.Time Teacher</strong></td>
<td>$63,016</td>
<td>$63,016</td>
<td></td>
</tr>
<tr>
<td>Q&amp;E Funding per Classroom/Prep.Time Teacher</td>
<td>$5,141</td>
<td>$7,641</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL SALARY &amp; BENEFIT FUNDING PER TEACHER</strong></td>
<td>$68,157 (f)</td>
<td>$70,656</td>
<td></td>
</tr>
<tr>
<td><strong>FUNDING SHORTFALL PER TEACHER</strong> (a) – (f)</td>
<td>$7,520</td>
<td>$6,665</td>
<td></td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
The secondary level is also underfunded. The average salary and benefits cost to DPCDSB is $77,321 per teacher. The FTE funded Foundation Grant for classroom teachers and preparation time is $1,703 per teacher. The total costs for classroom and preparation time (salary and benefits costs) is $131,640,018. The Ministry funding level is only $120,288,063. The difference is $11,351,955.

The funding shortfall at elementary level is $341.77 per student and $378.92 per student at secondary level. The aggregate shortfall for elementary and secondary level is $29,471,083 or $355.20 per student.

The average daily enrolment (ADE) is 82,971 students (53,013 elementary; 29,958 secondary).

The funding shortfall in 2005-2006, for elementary teachers is $7,520 and secondary $6,665.

Table 6 (revised estimates 2006-2007) compares the costs that are incurred by DPCDSB versus Ministry funding levels.

When the elementary level is addressed, the average salary and benefits costs to DPCDSB are $76,684 per teacher. The FTE funded Foundation Grant for classroom teachers and preparation time is $2,411 per teacher. The total costs for classroom and preparation time (salary and benefits costs) is $184,914,824. The Ministry funding level is only $180,732,781. The difference is $4,182,043.
Table 6

Dufferin-Peel Catholic District School Board
Classroom Teacher Funding and Cost
Revised Estimates 2006-2007

<table>
<thead>
<tr>
<th>DPCDSB Costs for Classroom &amp; Prep.Time Teachers:</th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher Average Salary &amp; Benefit costs for DPCDSB</td>
<td>$ 76,694</td>
<td>$ 77,825</td>
<td></td>
</tr>
<tr>
<td>FTE funded by Foundation Grant for Classroom Teachers &amp; Preparation Time Teachers</td>
<td>$ 2,411</td>
<td>1,814</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CLASSROOM &amp; PREP.TIME TEACHER SALARY &amp; BENEFIT COSTS</strong> (a) x (b)</td>
<td><strong>$184,914,824</strong></td>
<td><strong>$141,186,648</strong></td>
<td><strong>$326,101,472</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MED Funding for Classroom &amp; Prep.Time Teachers:</th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Grant funding for Teacher Salary &amp; Benefits</td>
<td>$167,231,514</td>
<td>$125,813,692</td>
<td></td>
</tr>
<tr>
<td>Q&amp;E Grant Funding for Teacher Salary &amp; Benefits</td>
<td>$13,501,267</td>
<td>$11,926,863</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CLASSROOM &amp; PREP.TIME TEACHER FUNDING</strong></td>
<td><strong>$180,732,781</strong></td>
<td><strong>$137,740,555</strong></td>
<td><strong>$318,473,336</strong></td>
</tr>
<tr>
<td>Funding Shortfall (d) – (e)</td>
<td>$4,182,043</td>
<td>$3,446,093</td>
<td>$7,628,136</td>
</tr>
<tr>
<td><strong>Funding Shortfall per Pupil</strong></td>
<td>$80</td>
<td>109</td>
<td>91</td>
</tr>
</tbody>
</table>

**Average Daily Enrolment at Estimates 2006-07**

<table>
<thead>
<tr>
<th>Other Date:</th>
<th>Elementary</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Enrolment for Estimates 06-07</td>
<td>52,278</td>
<td>31,666</td>
<td>83,944</td>
</tr>
<tr>
<td>FTE for Classroom &amp; Prep.Time Teachers Generated from Foundation Grant Chart</td>
<td>2,411</td>
<td>1,814</td>
<td></td>
</tr>
<tr>
<td>Per Pupil Funding from Foundation Grant Chart for Classroom &amp; Prep.Time Teachers</td>
<td>$3,199</td>
<td>$3,973</td>
<td></td>
</tr>
<tr>
<td>Salary &amp; Benefit funding in Foundation Grant Chart per Classroom/Prep.Time Teacher</td>
<td>$69,358</td>
<td>$69,358</td>
<td></td>
</tr>
<tr>
<td>Q&amp;E Funding per Classroom/Prep.Time Teacher</td>
<td>$5,600</td>
<td>$6,574</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL SALARY &amp; BENEFIT FUNDING PER TEACHER</strong></td>
<td><strong>$74,958</strong></td>
<td><strong>$75,932</strong></td>
<td></td>
</tr>
<tr>
<td>Average Salary &amp; Benefit costs for DPCDSB for Teachers</td>
<td>$76,694</td>
<td>$77,825</td>
<td></td>
</tr>
<tr>
<td><strong>FUNDING SHORTFALL PER TEACHER</strong></td>
<td><strong>$1,736</strong></td>
<td><strong>$1,893</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** DPCDSB August 2005
The secondary level salaries are also underfunded. The average salary and benefits cost to DPCDSB is $77,825 per teacher. The Full Time Equivalent (FTE) funded Foundation Grant for classroom teachers and preparation time is $1,814 per teacher. The total costs for classroom and preparation time (salary and benefits costs) is $141,186,648. The Ministry funding level is only $137,740,555. The difference is $3,446,093.

The funding shortfall at elementary level is $80.00 per student and $108.83 per student at secondary level. The aggregate shortfall for elementary and secondary level is $7,628,136 or $90.87 per student.

The average enrolment (ADE) is 83,944 students (52,278 elementary; 31,666 secondary).

The average enrolment (ADE) increase/decrease from 2005-2006 to 2006-2007 is 973 additional students or 1.1% (minus 1.3% elementary, plus 5.7% secondary).

The funding shortfall in 2006-2007 for elementary teachers is $1,736 and secondary $1,893.

The issue of funding for employee compensation is critical because most school boards use 80% plus of their budgets to fund this line.

Since the new funding system was introduced in 1998, the gap has grown significantly.

The OCSTA (2006) commented in their brief (p.#3) to the Minister of Education that the additional funding increase of 8.3% in 2006-2007 was acknowledged. This also included 2.5% to meet the current cost of the labour framework.
### Table 7

**Elementary Teacher Salary Increases**  
**For the Period from 2000 to 2005**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Teacher Salaries Provided by Ministry</td>
<td>$50,975</td>
<td>$50,975</td>
<td>$52,504</td>
<td>$54,079</td>
<td>$55,161</td>
<td></td>
</tr>
<tr>
<td>Classroom Teacher Benefits Provided by Ministry</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Increase in Benchmark salary over previous year</td>
<td>1.95%</td>
<td>0.00%</td>
<td>3.00%</td>
<td>3.00%</td>
<td>2.00%</td>
<td>9.95%</td>
</tr>
<tr>
<td>Q&amp;E funded per teacher</td>
<td>2,823</td>
<td>2,865</td>
<td>2,904</td>
<td>3,160</td>
<td>3,598</td>
<td></td>
</tr>
<tr>
<td>Real 2% Allocation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Funded Salary &amp; Benefits</strong></td>
<td>59,915</td>
<td>59,957</td>
<td>61,709</td>
<td>63,728</td>
<td>65,472</td>
<td>65,472</td>
</tr>
<tr>
<td>Total % Increase in Ministry Funding including Q&amp;E</td>
<td>1.03%</td>
<td>0.07%</td>
<td>2.92%</td>
<td>3.27%</td>
<td>2.74%</td>
<td>10.04%</td>
</tr>
<tr>
<td>Local Priorities</td>
<td>(1) $100</td>
<td>(2) $200</td>
<td>(3) $200</td>
<td>(3) $200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Actual Class Teacher Salaries:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>$54,754</td>
<td>$56,322</td>
<td>$57,410</td>
<td>$62,318</td>
<td>$65,550</td>
<td></td>
</tr>
<tr>
<td>% increase over previous year</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>9%</td>
<td>5%</td>
<td>20.53%</td>
</tr>
<tr>
<td>Actual Classroom Teacher Benefits</td>
<td>13.30%</td>
<td>13.30%</td>
<td>13.30%</td>
<td>13.39%</td>
<td>13.39%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Actual Salary &amp; Benefits</strong></td>
<td>$62,036</td>
<td>$63,813</td>
<td>$65,046</td>
<td>$70,662</td>
<td>$74,327</td>
<td></td>
</tr>
<tr>
<td>School board actual Salary % increases over previous year</td>
<td>N/A</td>
<td>2.86%</td>
<td>1.93%</td>
<td>8.64%</td>
<td>5.19%</td>
<td>18.62%</td>
</tr>
</tbody>
</table>

### Underfunded Salaries

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>$2,121</td>
<td>$3,855</td>
<td>$3,337</td>
<td>$6,934</td>
<td>$8,855</td>
</tr>
</tbody>
</table>

**Source:** DPCDSB August 2005

**Note:**

1. Represents % of salary funding increase from prior year, including salary and benefits and Q&E.
2. Represents % of our school board’s actual salary costs increase from prior year, including salary and benefits and grip/step increase.
3. According to the funding model, there is no requirement to allocate local priorities funding to classroom teacher salaries.
### Table 8

**Secondary Teacher Salary Increases**

**For the Period from 2000 to 2005**

<table>
<thead>
<tr>
<th></th>
<th>2000-01</th>
<th>2001-02</th>
<th>2002-03</th>
<th>2003-04</th>
<th>Revised Estimates</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Teacher Salaries Provided by Ministry</td>
<td>$50,975</td>
<td>$50,975</td>
<td>$52,504</td>
<td>$54,079</td>
<td>$55,161</td>
<td></td>
</tr>
<tr>
<td>Classroom Teacher Benefits Provided by Ministry</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Increase in Benchmark salary over previous year</td>
<td>1.95%</td>
<td>0.00%</td>
<td>3.00%</td>
<td>3.00%</td>
<td>2.00%</td>
<td>8.00%</td>
</tr>
<tr>
<td>Q&amp;E funded per teacher</td>
<td>5,228</td>
<td>6,109</td>
<td>6,300</td>
<td>6,322</td>
<td>5,992</td>
<td></td>
</tr>
<tr>
<td>Real 2% Allocation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>96</td>
<td></td>
</tr>
<tr>
<td><strong>Total Funded Salary &amp; Benefits</strong></td>
<td>62,320</td>
<td>63,201</td>
<td>65,104</td>
<td>66,890</td>
<td>67,868</td>
<td>7.22%</td>
</tr>
<tr>
<td>Total % Increase in Ministry Funding including Q&amp;E (1)</td>
<td>0.00%</td>
<td>1.41%</td>
<td>3.01%</td>
<td>2.74%</td>
<td>1.46%</td>
<td></td>
</tr>
<tr>
<td>Local Priorities (3)</td>
<td>$100</td>
<td>$200</td>
<td>$200</td>
<td>$200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2000-01</th>
<th>2001-02</th>
<th>2002-03</th>
<th>2003-04</th>
<th>Revised Estimates</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actual Class Teacher Salaries:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary</td>
<td>$57,770</td>
<td>$60,114</td>
<td>$60,941</td>
<td>$65,138</td>
<td>$67,875</td>
<td>12.47%</td>
</tr>
<tr>
<td>% increase over previous year</td>
<td>12.40%</td>
<td>13.09%</td>
<td>12.77%</td>
<td>12.93%</td>
<td>12.93%</td>
<td></td>
</tr>
<tr>
<td>Actual Classroom Teacher Benefits</td>
<td>$64,933</td>
<td>$67,982</td>
<td>$68,723</td>
<td>$73,560</td>
<td>$76,651</td>
<td>17.03%</td>
</tr>
<tr>
<td><strong>Total Actual Salary &amp; Benefits</strong></td>
<td>$N/A</td>
<td>4.70%</td>
<td>1.09%</td>
<td>7.04%</td>
<td>4.20%</td>
<td></td>
</tr>
<tr>
<td>School board actual Salary % increases over previous year (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2000-01</th>
<th>2001-02</th>
<th>2002-03</th>
<th>2003-04</th>
<th>Revised Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Underfunded Salaries</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary</td>
<td>$2,613</td>
<td>$4,781</td>
<td>$3,619</td>
<td>$6,670</td>
<td>$8,783</td>
</tr>
</tbody>
</table>

**Source:** DPCDSB August 2005

**Note:**

1. Represents % of salary funding increase from prior year, including salary and benefits and Q&E.
2. Represents % of our school board’s actual salary costs increase from prior year, including salary and benefits and grip/step increase.
3. According to the funding model, there is no requirement to allocate local priorities funding to classroom teacher salaries.
### Table 9

**Cost of Negotiated Settlements**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>% Ministry Benchmark Increase</td>
<td>3.0</td>
<td>3.0</td>
<td>2.0</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
<td>15.50</td>
</tr>
<tr>
<td>% increase At school board</td>
<td>3.0</td>
<td>6.48</td>
<td>2.0</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
<td>18.98</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
They continued in the same report that the additional funding was not new money. It was in fact a realignment of money from Local Priorities Allocation (LPA) and the Learning Opportunities Grant (LOG). The LPA was in fact eliminated, and the LOG was adjusted.

The LPA grants affect the school boards and their flexibility to fund items not covered by the Ministry. These areas could also support Catholic programs. The programs include but are not limited to chaplains, faith animators, student retreats, and faith formation for staff.

The LOG grant will have an effect on programs for at-risk students. This Ministry of Education wants to protect these students. The benefits of removing money from one envelope to an adjustment of another envelope become minimal.

**Preparation Time**


Many Catholic school boards have addressed preparation time by increasing it to 200 minutes. The Ministry target of 200 minutes will occur in the 2008-2009 provincial framework.

**Secondary Average Credit Load**

The funding was improved to provide the money for 7.5 credits. Many school boards provide their students more than 7.5 credits. The Education Equality Task Force (EETF) noted that over 50 school boards offer more than 7.5 credits. This increase was
due to the introduction of the 4-year program. The teachers must be in place to deliver these additional credits. However, funding is not provided.

The OCSTA (2006) recommendation 1 (p.#5) requests the Ministry of Education: “That the Ministry of Education take steps to ensure that the provincial funding model for 2007-2008, and future years reflects the cost of employee salaries.”

DPCDSB has not been funded for a minimum of 44.10 teachers (see calculations in Table 10).

The Ministry of Education in 2000-01 had changed the secondary curriculum program from 5 years to 4 years. However, the Ministry of Education has not changed the funding to reflect this change in actual average pupil credits. As noted in Table 11, considering enrolment including special education self-contained class students in 2004-05, the average pupil credit was 7.71. Considering enrolment excluding special education self-contained classes, the enrolment was still at a high 7.76.

*Secondary Average Class Size*

The Ministry of Education letter dated May 2005 to English Catholic school board Directors promised funding if certain conditions were met. The conditions included provincial guidelines for salary increases and the new (at that time) Student Success Teacher positions for secondary school. There was no mention in the communication that the funding for secondary class size would actually decrease because of changing the average class size from 21 to 22 and that funding for teacher assignments would change. This particular information had an impact on negotiations.
Table 10

Average Pupil Credits
(2004-2005)

The Ministry had changed the secondary: curriculum from a 5-year program to a 4-year plan since the academic year 2000-2001. However, the Ministry has not changed the funding to reflect the change in actual average pupil credits. School boards are still funded for 7.5 average pupil credits, even though our school board has exceeded that level since 2002-2003 as evidenced in the attached document.

For 2004-2005, this means that we have not been funded for a minimum of 44.1 teachers. This underfunding totals $3,325,846 as per the calculations below.

**Formula**

\[
\frac{\text{Actual 2004-05 pupil credits}}{\text{66.5 teacher credit workload times 21 average class size}}
\]

**Actual**

\[
= \frac{221,315.13*}{6.5 \times 21} = 1,621.40
\]

**Funded**

\[
= \frac{28,706.31** \times 7.5}{6.5 \times 21} = 1,577.30
\]

**Difference**

\[44.10\]

= 44.1 teachers @ our school board’s secondary average salary of $75,416

= **$3,325,846 minimum underfunding**

* Pupil Credits reported on the secondary average class size report submitted in May 2005.

** Secondary students ADE for 2004-05 from the Ministry’s IMG website

*** Based on the 2004-05 enrolment numbers, we are funded for 215,297.32 pupil credits, resulting in a funding shortfall of 6,017.81 pupil credits

Source: DPCDSB August 2005
Table 11

Average Pupil Credit History – Secondary (Includes Special Education)

<table>
<thead>
<tr>
<th>Enrolment includes special education self-contained class students</th>
<th>2001-02</th>
<th>2002-03</th>
<th>2003-04</th>
<th>2004-05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupil Credits</td>
<td>201,739.19</td>
<td>208,478.42</td>
<td>208,162.76</td>
<td>221,315.13</td>
</tr>
<tr>
<td>Enrolment</td>
<td>27,344.01</td>
<td>27,743.56</td>
<td>27,247.86</td>
<td>28,706.31</td>
</tr>
<tr>
<td>Average Pupil Credits</td>
<td>7.38</td>
<td>7.51</td>
<td>7.64</td>
<td>7.71</td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
Table 12

Average Pupil Credit History – Secondary (Excludes Special Education)

<table>
<thead>
<tr>
<th></th>
<th>2001-02</th>
<th>2002-03</th>
<th>2003-04</th>
<th>2004-05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pupil Credits</td>
<td>201,739.19</td>
<td>208,478.42</td>
<td>208,162.76</td>
<td>221,315.13</td>
</tr>
<tr>
<td>Enrolment</td>
<td>27,138.01</td>
<td>27,549.58</td>
<td>27,045.86</td>
<td>28,516.31</td>
</tr>
<tr>
<td><strong>Average Pupil</strong></td>
<td><strong>7.43</strong></td>
<td><strong>7.57</strong></td>
<td><strong>7.70</strong></td>
<td><strong>7.76</strong></td>
</tr>
<tr>
<td><strong>Credits</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: DPCDSB August 2005
Table 13

Summary of Secondary Negotiation Settlements
Mandated By Ministry of Education

<table>
<thead>
<tr>
<th>Based on enrolment of 29,662</th>
<th>2005-06</th>
<th>2006-07</th>
<th>2007-08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of teachers funded by Ministry (based on 22:1 and 6 pupil credits)</td>
<td>(a)</td>
<td>1,685.7</td>
<td>1,699.3</td>
</tr>
<tr>
<td>Number of teachers on school board staffing report (before negotiations)</td>
<td></td>
<td>1,701.1</td>
<td>1,701.1</td>
</tr>
<tr>
<td>Number of teachers on school board staffing report (after negotiations)</td>
<td>(b)</td>
<td>1,757.3</td>
<td>1,771.0</td>
</tr>
<tr>
<td><strong>Overstaffed Positions</strong> (b – a)</td>
<td></td>
<td>71.6</td>
<td>71.7</td>
</tr>
</tbody>
</table>

Summary of Changes in Funding
(based on enrolment of 29,662)

| Staffed at 7.57 average pupil credits | 1,782.1 |
| Funded at 7.5 average pupil credits | - 1,765.6 |
| Total Differences | 16.5 |

| Staffed at 6 for Teacher Assignment | 1,765.6 |
| Funded at 6.5 for Teacher Assignment | - 1,629.8 |
| Total Differences | 135.8 |

| Staffed at Average Class Size of 22 | 1,685.3 |
| Funded at Average Class Size of 21 | - 1,765.6 |
| Total Differences | -80.3 |

**Total Differences in Funding for 2005-06** | 72.0 |

Source: DPCDSB August 2005
As noted in Table 13, the impact on our staffing positions in 2005-06 resulted in 71.6 overstaffed positions in secondary schools. This number would stay stable in 2006-07 and 2007-08 as projected to be 71.7 and 71.7 respectively. As a result of the changes in funding based on our enrolment of 29,662 students, we ultimately find ourselves in the year 2005-06 with a funding deficit of 72.0 positions.

**Employee Benefits**

The OCSTA brief to the Minister of Education (2006) comments (p.#6) that employee benefits are proportionally more underfunded that salary. In 2002, the funding level for employees was 12% for teachers and 15.7% for non teaching staff. The EETF reported in 2002 that the actual funding level should be 13.1% for teachers and 19.2% for non teaching staff.

The level of actual funding of employee benefits in 2006-2007 did not decrease. The actual percentage compared to salaries did decrease. It was 11.1% for teaching staff and 14.8% for non teaching employees.

The introduction of the Provincial Health Care premium affected school board benefit plans. There was a reduction of eligible services covered by the province. Employee groups were concerned with any decrease of service.

The OCSTA (2006) brief (p.#6) also addressed the issue of arbitration regarding the Ontario Health Premiums that may be extended to school board collective agreements.

The OCSTA (2006) recommendation 2 (p.#6) requested the Ministry of Education:
“That the Ministry of Education review and enhance the funding formula to ensure that benchmarks are in place to enable school boards to recognize the current costs for employee benefits.”

**Underfunding and Special Education**

There has been change in funding for special education, and in 2004-05, the Ministry withdrew some special education reserves. This, in fact, affected the service that was provided to students. The funding that DPCDSB receives from the Effectiveness and Equity Funding is insufficient to meet the cost of $8.3 million underfunding to address our special education envelope.

On a position of ethics and morality, in the 2005-2006 school year there were over 1,000 students waiting for a special education assessment. It is difficult to accept that these children must wait for up to 3 years for assessment. Valuable time is being lost to this inequity. These students must receive their assessment early in their school life to ensure that they receive the special services needs that are required to meet their future needs.

The Special Education funding envelope in 2004-05 is addressed in Table 14. The Special Education Grant (both panels) for classroom instruction totals $58,349,175. Non classroom funding was $4,656,323, for a total of $63,005,498. This includes a Ministry claw back of $4,110,065.

The Foundation Grant for self-contained special education classes offered to DPCDSB totalled $5,099,400. The breakdown was $4,603,110 for the classroom component and $496,290 for non classroom expenses.
The Ministry funded for Qualification and Experience Allocation for special education classes a total of $366,345. This total represents $327,821 for self-contained special education classes and $38,524 for preparation time.

Therefore, the total aggregate funding for the Special Education envelope was $68,471,243. In 2004-05, the Special Education expenditures were $76,777,017. The Special Education envelope was overspent by $8,305,773.

This amount was reduced with an allocation of $2,358,539 from Effectiveness and Equity Funding (EEF). The net overspending of the Special Education envelope was $5,947,234.

The total expenditure-operating budget for DPCDSB in 2004-05 is $604,388,932 (Table 15). The special education operating costs were $76,777,017, totalling 12.7% of the school board budget. The instructional/benefits and non instructional salaries/benefits total 14.0% of the school board budget. The operating budget is 3.4% of the overall budget.

The OCSTA (2006) Ministry brief confirmed there has been funding improvement since 1998. The Ontario government provided an additional $33 million to help children. This was incremental to the $50 million to support students, and reforming Special Education.

The Ontario government now offers grants totalling $2 billion dollars to Special Education.

The OCSTA wants the Ministry to address education with an allocation that is layered. There are funds paid through Foundation Grants and a form of grant called the
Special Education per Pupil Amount (SEPPA). The costs within SEPPA must be reviewed and updated to reflect the true cost to school boards.

The Ministry provides funding for students with high needs. This includes special equipment. In the past the Ministry requested time-consuming application and reporting of these claims.

The OCSTA (2006) provided the following recommendations to the Ministry of Education Recommendation 5: “That the Ministry of Education continue to allocate funds for Special Education through a layered process that includes the Foundation Grant, a separate and protected SEPPA grant and funding to recognize the incidence of students with high needs” [Emphasis Added].

Recommendation 6: That benchmark with the SEPPA allocation be reviewed and updated to reflect actual school board costs, particularly at the secondary level.

Recommendation 7: That the Ministry of Education develop a research/review process to confirm the validity of, or track changes in, current rates of student with high needs in order to inform future funding decisions.
## Table 14

Special Education Funding Enveloping
2004-2005 School Year

<table>
<thead>
<tr>
<th>Expenditure Categories</th>
<th>(A) Special Education Grants</th>
<th>(B) Foundation Grant Allocation</th>
<th>(C) Qualifications &amp; Experience Allocation</th>
<th>(D) Total Funding (A+B+C)</th>
<th>(E) Special Education Expenditures (Schedule 10A &amp; 10B)</th>
<th>Funding Shortfall/ (Surplus) (E) – (D)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Instruction:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classroom Teachers</td>
<td>$23,537,418</td>
<td>$4,450,170</td>
<td>$327,821</td>
<td>$28,315,410</td>
<td>$31,422,960</td>
<td>$3,107,549</td>
</tr>
<tr>
<td>Supply Teachers</td>
<td>1,097,476</td>
<td>152,940</td>
<td>0</td>
<td>1,250,416</td>
<td>1,372,385</td>
<td>121,969</td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>23,123,068</td>
<td>0</td>
<td>0</td>
<td>23,123,068</td>
<td>26,065,267</td>
<td>2,942,199</td>
</tr>
<tr>
<td>Textbooks &amp; Classroom Supplies</td>
<td>1,578,529</td>
<td>0</td>
<td>0</td>
<td>1,578,529</td>
<td>1,771,505</td>
<td>192,976</td>
</tr>
<tr>
<td>Computers</td>
<td>120,420</td>
<td>0</td>
<td>0</td>
<td>120,420</td>
<td>138,116</td>
<td>17,696</td>
</tr>
<tr>
<td>Professionals &amp; Para-professionals</td>
<td>8,476,246</td>
<td>0</td>
<td>0</td>
<td>8,476,246</td>
<td>9,683,199</td>
<td>1,206,913</td>
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<tr>
<td>Library &amp; Guidance</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Staff Development</td>
<td>416,017</td>
<td>0</td>
<td>0</td>
<td>416,017</td>
<td>471,393</td>
<td>55,376</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>$58,349,175</td>
<td>$4,603,110</td>
<td>$327,821</td>
<td>$63,280,106</td>
<td>$70,924,785</td>
<td>$7,644,678</td>
</tr>
<tr>
<td>Non-Classroom:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preparation Time</td>
<td>$3,335,991</td>
<td>$496,290</td>
<td>$38,524</td>
<td>$3,870,805</td>
<td>$4,356,945</td>
<td>$486,140</td>
</tr>
<tr>
<td>Principals &amp; Vice-Principals</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Department Heads</td>
<td>97,672</td>
<td>0</td>
<td>0</td>
<td>97,672</td>
<td>120,846</td>
<td>23,174</td>
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<tr>
<td>School Secretaries</td>
<td>2,838</td>
<td>0</td>
<td>0</td>
<td>2,838</td>
<td>3,116</td>
<td>278</td>
</tr>
<tr>
<td>&amp; Supplies</td>
<td>1,219,822</td>
<td>0</td>
<td>0</td>
<td>1,219,822</td>
<td>1,371,325</td>
<td>151,503</td>
</tr>
<tr>
<td>Coordinators &amp; Consultants</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Trustees</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Directors &amp; Supervisory Officers</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>School board Administration</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>School Operations</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Continuing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Education Transportation</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>School Renewal</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Debt Charges</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New Pupil Places</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>$4,656,323</td>
<td>$496,290</td>
<td>$38,524</td>
<td>$5,191,137</td>
<td>$5,852,232</td>
<td>$661,095</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>$63,005,498*</td>
<td>$5,099,400</td>
<td>$366,345</td>
<td>$68,471,243</td>
<td>$76,777,017</td>
<td>$8,305,773</td>
</tr>
</tbody>
</table>

*Includes Ministry claw back of $4,110,065
### Breakdown of Allocation of Paraprofessional Expenditures to Special Education
(Determined by Principal, Special Education)

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Costs</th>
<th>% Charged to Spec. Ed</th>
<th>$ Charged to Spec. Ed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Psychologists</td>
<td>$3,204,060</td>
<td>80%</td>
<td>$2,563,248</td>
</tr>
<tr>
<td>Social Workers</td>
<td>$3,123,912</td>
<td>35%</td>
<td>$1,093,369</td>
</tr>
<tr>
<td>Speech/Language</td>
<td>$2,780,443</td>
<td>45%</td>
<td>$1,251,199</td>
</tr>
<tr>
<td>CYW’s</td>
<td>$5,993,737</td>
<td>75%</td>
<td>$4,495,303</td>
</tr>
<tr>
<td>ISA 1 Technicians</td>
<td>$120,438</td>
<td>100%</td>
<td>$120,438</td>
</tr>
<tr>
<td>Travel, memberships, supplies &amp; services, etc.</td>
<td>$159,602</td>
<td></td>
<td>$159,602</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$15,382,192</strong></td>
<td></td>
<td><strong>$9,683,159</strong>*</td>
</tr>
</tbody>
</table>

We received $2,358,539 from EEF. We have a net reduction in special education funding of $1,751,526 compared to the original claw back.

- **Special Education Envelope Over spending**: $8,305,773
- **EEF Claim Approved**: ($2,358,539)
- **Net Overspending of Special Education Envelope**: $5,947,234

Source DPCDSB August 2005
Table 15

Special Education Expenditures

Comparative to Total 2004/2005 Revised Budget

<table>
<thead>
<tr>
<th></th>
<th>Total Board Revised 2004/2005</th>
<th>Special Education Revised 2004/2005</th>
<th>% of Total Board Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Salaries &amp; Benefits</td>
<td>$436,850,650</td>
<td>$63,330,901</td>
<td></td>
</tr>
<tr>
<td>Non-Instructional Salaries &amp; Benefits</td>
<td>93,134,693</td>
<td>10,865,999</td>
<td></td>
</tr>
<tr>
<td><strong>Sub-Total – Salaries</strong></td>
<td>$529,985,343</td>
<td>88%</td>
<td>$74,196,900 96.6% 14%</td>
</tr>
<tr>
<td>Other Operating:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation Contracts</td>
<td>17,379,955</td>
<td>2.9%</td>
<td></td>
</tr>
<tr>
<td>school &amp; Family Superintendent Budgets</td>
<td>13,792,106</td>
<td>2.3%</td>
<td>686,855 0.9%</td>
</tr>
<tr>
<td>Continuing Education (non-salary)</td>
<td>2,278,112</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>Department Budgets (CEC and Keaton)</td>
<td>13,066,865</td>
<td>2.2%</td>
<td>1,700,767 2.2%</td>
</tr>
<tr>
<td>Utilities</td>
<td>14,024,583</td>
<td>2.2%</td>
<td></td>
</tr>
<tr>
<td>Plant Expenditures/Maintenance Contracts</td>
<td>6,901,074</td>
<td>1.1%</td>
<td></td>
</tr>
<tr>
<td>Computer Lease Plans / Technology Upgrades</td>
<td>5,247,384</td>
<td>0.9%</td>
<td>192,495 0.3%</td>
</tr>
<tr>
<td>Insurance</td>
<td>1,713,510</td>
<td>0.3%</td>
<td></td>
</tr>
<tr>
<td><strong>Sub-Total – Other Operating</strong></td>
<td>74,403,589</td>
<td>12%</td>
<td>2,580,117 3.4%</td>
</tr>
<tr>
<td><strong>Total Expenditure Budget – Operating</strong></td>
<td>$604,388,932</td>
<td>100.0%</td>
<td>$76,777,017 100.0% 12.7%</td>
</tr>
</tbody>
</table>

- Instructional Salaries: Teachers, ISA 4 Teachers, Prep Time, Supply Teaching, ERWs, Department Heads
- Non-Instructional Salaries: APSSP Staff, Co-Ordinator/Consultants
- School & Family Supt. Budgets: Per pupil allocation ($8.30/Elern $7.11/Sec)

Source DPCDSB August 2005
The Dufferin-Peel Catholic District School Board was able to accrue over $14 million in year 2002-2003 with approximately $7 million additional funds for ISA cycle 5 in fall of 2004. The ISA process had helped to achieve the funding for students with high needs.

Special Education per pupil funding in March 2004 was $562 for each JK to grade 3 student, $424 for grades 4-8, and $274 for grades 9-12. The funding is reduced at high school level. The costs of the programs are similar regardless of the panel.

Special Education Plans were required to be submitted yearly. The funding instability and timelines were not aligned with the planning process.

Another issue is that students with special needs may also be in need of health, community services, and care and treatment services. Many students must deal with various ministries to access levels of services. Schools cannot provide treatments that are required by individual student’s need. These would include intensive behaviour analysis, correctional, and high care and treatment facilities.

Students with special needs must have the right to attend an inclusive classroom. This inclusion would require curriculum development and implementation at the classroom level and its associated costs. The Catholic community would not accept anything short of inclusion.

Miscellaneous

There have been a number of miscellaneous funding issues that the DPCDSB had drawn to the attention of the Minister of Education. The school board and its administration would in fact be in compliance if it were not necessary to cover
incremental requirements of the Ministry. The underfunding in this envelope is related to at least four of the following points:

- No funding for qualifications and experience for non teaching staff;
- No extra funding for the additional mandated Ministry programs such as criminal reference checks;
- The application accountability for special education requires additional administrative staffing; and
- The social movement towards more accountability to the public along with higher service expectations has increased our legal costs substantially.
- The Ministry has not adjusted the English as a secondary language grant to recognize that many students requiring ESL are actually Canadian born. Most of the statistics used to calculate the grants were outdated.
- The Ministry introduced initiatives such as primary class reduction but has not allowed the school board to include the indirect costs that are a result of this initiative.
- The school board supplies are funded at the annual rate of $7 per student. Our school board currently incurs costs in excess of $25 per student, resulting in an accumulating total of $1.5 million.
- On a denominational issue, the Ministry does not fund some of the unique costs associated with Catholic school boards that are delivering Catholic education.

Summary

This chapter outlines the process on how the DPCDSB initially announced to the Ministry the underfunding concerns and the ultimate installation of the Chair of the Co-
Management Team. The school board has asked the Ministry of Education to rename the position “Supervisor” as noted under the Education Act.

**Organization of the Study**

The methodology used the qualitative, chronological, and analytical data collection technique. The organization of the study is based on the case study method. The study required direct interviews with individuals that would be considered stakeholders within the system. There will also be a review of literature primarily from clippings, from newspapers over the last 3+ years. The articles come from a variety of sources and are listed in the References section of this thesis.

There will also be direct reflection from this Trustee and 24 years of experience.

There is a sense that positivism does exist within education. Both the Ministry and the school boards of education must recognize it.

This is an issue of human interest. It affects not only a child directly but society as a whole. There are participants directly involved in education (various levels) and those looking into this situation. This researcher will attempt to provide a neutral outlook on the causes and ultimately a solution to the long-term concern of provincial underfunding.

This thesis addresses three fundamental questions:

1. What events led DPCDSB to be in a position where the Ministry of Education appointed the Chair of Co-Management Team?
2. What impact have these events had on the stakeholders?
3. How to resolve the problem of educational funding in the province of Ontario?
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABA</td>
<td>Applied Behavioural Analysis</td>
</tr>
<tr>
<td>ADD</td>
<td>Attention Deficit Disorder</td>
</tr>
<tr>
<td>ADE</td>
<td>Average Daily Enrolment</td>
</tr>
<tr>
<td>ADHD</td>
<td>Attention Deficit Hyperactivity Disorder</td>
</tr>
<tr>
<td>AGM</td>
<td>Annual General Meeting</td>
</tr>
<tr>
<td>AODA</td>
<td>Annual Ontarians Disabilities Act</td>
</tr>
<tr>
<td>ASD</td>
<td>Autism Spectrum Disorder</td>
</tr>
<tr>
<td>Beacon Family</td>
<td>Brampton East/Caledon/Dufferin/Malton Family of schools</td>
</tr>
<tr>
<td>CEC</td>
<td>Catholic Education Centre (School Board Office)</td>
</tr>
<tr>
<td>“Coalition”</td>
<td>The Dufferin-Peel Coalition of Catholic Secondary schools</td>
</tr>
<tr>
<td>CPCO</td>
<td>Catholic Principal's Council of Ontario</td>
</tr>
<tr>
<td>CYW</td>
<td>Child and Youth Worker</td>
</tr>
<tr>
<td>CCAC</td>
<td>Community Care Access Center</td>
</tr>
<tr>
<td>CCCSC</td>
<td>Dufferin-Peel Central Committee of Catholic school Councils</td>
</tr>
<tr>
<td>Deadheading</td>
<td>Distance and time from the end of one bus run to the beginning of the next run</td>
</tr>
<tr>
<td>DPRAPCE</td>
<td>Dufferin-Peel Regional Association of Parents in Catholic Education</td>
</tr>
<tr>
<td>EEF</td>
<td>Effectiveness and Equity Fund</td>
</tr>
<tr>
<td>EETF</td>
<td>Education Equity Task Force</td>
</tr>
<tr>
<td>EFA</td>
<td>The Ontario Liberal Plan for Education, Excellence for All</td>
</tr>
<tr>
<td>ELD</td>
<td>English Literacy Development</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>EQAO</td>
<td>Education Quality and Accountability Office</td>
</tr>
<tr>
<td>ERW</td>
<td>Educational Resource Worker</td>
</tr>
<tr>
<td>“Especially Yours”</td>
<td>Special Education Newsletter</td>
</tr>
<tr>
<td>ETFO</td>
<td>Elementary Teachers Federation of Ontario</td>
</tr>
<tr>
<td>FTE</td>
<td>Full Time Equivalent</td>
</tr>
<tr>
<td>GAP</td>
<td>General Administrative Policy</td>
</tr>
<tr>
<td>GSN</td>
<td>Grants for Student Needs</td>
</tr>
<tr>
<td>ICE</td>
<td>Institute for Catholic Education</td>
</tr>
<tr>
<td></td>
<td>(Responsible for all aspects of Catholicity including curriculum)</td>
</tr>
<tr>
<td>IEP</td>
<td>Individual Education Plan</td>
</tr>
<tr>
<td>IPRC</td>
<td>Identification Placement and Review Committee</td>
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<td>ISA</td>
<td>Intensive Support Amount</td>
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<td>LOG</td>
<td>Local Opportunities Grants</td>
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<tr>
<td>LPA</td>
<td>Local Priorities Allocation</td>
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<tr>
<td>LTP</td>
<td>Late Term Period</td>
</tr>
<tr>
<td>MCSS</td>
<td>Ministry of Community and Social Services (Serve children ages 18+)</td>
</tr>
<tr>
<td>MCYS</td>
<td>Ministry of Children’s Youth Services (Serve children ages 0-18 yrs.)</td>
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<tr>
<td>M of E./MOE</td>
<td>Ministry of Education</td>
</tr>
<tr>
<td>MTP</td>
<td>Mid term Period</td>
</tr>
<tr>
<td>OAPCE</td>
<td>Ontario Association of Parents in Catholic Education</td>
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<tr>
<td>OCCB</td>
<td>Ontario Conference of Catholic Bishops</td>
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</table>
OCFLEN  The Ontario Catholic Family Life Education Network
OCSBOA  Ontario Catholic School Business Officials Association
OCSTA  Ontario Catholic School Trustees Association
OCSOA  Ontario Catholic Supervisory Officers Association
OCT  Ontario College of Teachers
OECTA  Ontario English Catholic Teachers Association
OPSBA  Ontario Public School Boards Association
OPEN  Ontario Provincial Education Network
OSBA  Ontario School Boards Association
OSSLT  Ontario Secondary School Literacy Test
OSSTF  Ontario Secondary School Teachers Federation
OSTF  The Ontario School Teachers Federation
PAG  Pupil accommodation grants
“Partners”  Dufferin-Peel Partners in Education Committee
PEO  Parent Engagement Office
PEP  Post election Period
PFE  People for Education
SBOG  School board Operating Grants
SEA  Special Equipment Amounts (replaced ISA grates)
SEAC  Special Education Advisory Committee
SEPPA  Special Education Per Pupil Amount
SERC  Special Education Resource Class
SERT  Special Education Resource Teacher
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>TDSB</td>
<td>Toronto District School Board</td>
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<tr>
<td>TFRC</td>
<td>Transportation Funding Review Committee</td>
</tr>
<tr>
<td>“The Advocate”</td>
<td>School Advocate Newspaper Publication</td>
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<tr>
<td>TQEG</td>
<td>Teachers’ Qualifications and Experience Grant</td>
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CHAPTER TWO: LITERATURE REVIEW

Brief Background

The literature review was derived from various media, including newspaper articles, magazines, clipping services, libraries, articles obtained through public relations departments, education focused organizations, school board and committee documents, and published public reports (Ministry and otherwise).

It will bring into context what has happened in the recent past, pre-current Liberal government. It will address the early days of the McGuinty government and their education mandate. The literature review will address the issue to February 07, 2007. This is a few days after the date the government appointed the Chair of the Co-Management Team, who then addressed the school board, and announced taking over the financial administration of the school board.

The report titled “Policy Trends in Ontario Education, 1990-2003” (p.#17) referenced that the Harris Progressive Conservative government made amendments to the Education Act that made it illegal for school boards to operate a deficit budget. In June 2002, three of the largest public school boards in Ontario (Toronto, Ottawa, and Hamilton) filed deficit budgets, insisting that the existing funding formula did not provide to their students acceptable educational services and services. The Toronto District School Board, (TDSB) adopted a budget with a $90 million deficit, and the Ottawa and Hamilton school boards submitted deficit budgets of $18 million and $16 million respectively. The school boards took this action as one form of protest against the poor funding formula prevailing at that time for education of its students.
The government responded by enacting portions of the Education Act and appointed independent auditors to inspect the finances and operations of the three school boards. The auditors were also required to recommend how to cut expenditures to balance the school board’s budgets. This expenditure reduction was of course not to directly affect the classroom expenses and the learning environment.

What happened in response of the auditor’s report was that the Trustees were adamant not to balance their financial plan and submitted their deficit budget. The government then exercised its right to take over governing authority from the Trustees of the various school boards. The government approved an exclusive supervisor to each school board to oversee the financial cuts in operations at their respective school boards. This occurred in August 2002. The Supervisors were each appointed for a one-year term. The provincial government with this action in September 2002 had control of over 20% of the student population in the province.

There were discussions at each of the affected school boards about the issues surrounding the political takeover of these school boards and its wider implications. There were comments made that these appointments were inappropriate and were an affront to local democracy. The Trustees, during the time of supervision, continued to hold meetings but had no decision-making power and could only advise the administration. They could not give direction. The Trustees challenged the legality of the government’s takeover in court and the challenge was unsuccessful.

The legal actions of the three school boards in defiance of the government was unsuccessful; however, it did force the Eves Progressive Conservative government to take action regarding the complaints on the level of education funding formula and its
equity to school boards across this province. Premier Ernie Eves on May 2, 2002 announced the establishment of an education task force to review the province’s method of funding education.

The report, “Policy Trends in Ontario Education 1990-2003” stated that education funding in Ontario become centralized as a result of Bill 160. The government removed the power of local school boards to raise funds through property taxes. This move prevented school boards from topping off provincial grants for their basic operating costs in running the school board and its regular programs. It also prevented the funding of unique and special program services recognized by the Trustees and community that were determined as local needs and priorities.

By centralizing control over the educational levy on property taxes across the province, the province was intent on addressing issues of greater equity per pupil. This form of educational funding was intended to drive equity regardless of location in the province, type and wealth of the community, and its residential and business tax base.

The report makes an interesting comment that, with the passage of Bill 160 in 1997, Catholic and French language school boards benefited initially from the change in the funding formula.


It is my intention to initially address the Rozanski report (2002) from its contextual position on funding and government position in the report. I will then address articles that relate to the three key areas that DPCDSB considered crucial to the cause of the submitted budget deficit. The three areas are Transportation, Salaries, and Special Education.
The Rozanski report, (November 28, 2002) may have crystallized the issue in the collective mind of everyone involved in the Ontario education scene. This would include taxpayers and ratepayers with and without children in the school system. The Rozanski report is formally known as the “Education Equality Task Force, Investing in Public Education: Advancing the Goal of Continuous Improvement in Student Learning and Achievement” (EETF).

The Rozanski report of 2002 offered 33 recommendations specifically linked to government and its educational issues. It recommended a 3-year implementation plan starting in the 2003 school year. The recommendations associated with the Rozanski report were reflective of the fact that the funding formula was outdated and that the benchmark values were outdated due to being established in the early 1990s.

The report further states that the Rozanski report exposed shortcomings in the funding formula; however, it also had provided some support of the funding formula in the province. The EETF positioned its concern that the key to the problems of funding of education was the fact noting the outdated benchmarks in the funding formula.

Mordechai Rozanski was at the time of the appointment the President and Vice-Chancellor at the University of Guelph. He was appointed to lead the EETF with a mandate to recommend how to improve equity, fairness, certainty, and stability in the funding for the education of Ontario students and their schools. He was asked to review six areas of the funding formula. They are stated here in general terms: (a) fund distribution to different school boards, (b) structure of cost benchmarks, (c) local expenditure for flexibility, (d) school renewal, (e) special education, and (f) student transportation.
The EETF requested a total funding increase in education of $1.8 billion over the 3-year period. The report also requested that school boards should be more autonomous for expenditures to support at-risk students.

The topic of underfunding has its roots in history. There have been a number of reports and issues submitted over the years to the Ministry of Education and the Ontario Legislature.

Mr. Mordechai Rozanski (2002), in the letter of transmittal to the Minister of Education, the Honourable Elizabeth Witmer, said, "Thank you for giving me an opportunity to serve the people of Ontario by conducting this review of the Province's education funding formula." It is interesting that the government did not aggressively react to the recommendations after the EETF was published.

Mr. Rozanski was appointed to study the funding formula and make recommendation based on the tenets of equity, fairness, certainty, and stability (Rozanski, 2002, p.3). The information that was collected was from viewpoints of the stakeholders within the province of Ontario. The information collected was formal and informal, written and oral submissions. This information came from educational thinkers and practitioners, researchers, former ministers, deputy ministers, and advisors. These groups were representative of the education scene. There was also a formal Stakeholder Advisory Committee constituted with individual representatives from across the province.

In September 2002, Mr. Rozanski conducted 10 days of public meetings in Ottawa, Thunder Bay, Toronto, North Bay, London, and Barrie. Mr. Rozanski met with
and heard presentations from more than 900 people and received 882 formal submissions (Rozanski, 2002, p.#8).

The EETF was set to review six specific aspect of the funding formula. These are stated (Rozanski, 2002, p.#5):

1. The effectiveness of the model for distributing funds between different types of school boards (urban and rural, large and small school boards).
2. The structure of cost benchmarks (a reflection on the appropriate pupil costs).
3. Degrees of local expenditure flexibility for school board
4. Approaches to addressing school renewal (maintenance, repairs, and renovations).
5. Whether the current approach to funding special education is the most responsive way to meet students' needs.
6. The approach to funding student transportation, including ways to maximize opportunities for shared bussing services between coterminous school boards that serve the same communities.

Mr. Rozanski was also asked to ensure the recommendations:

1. Promote the principles on which the funding mechanism was built, which included fairness, equity, responsiveness to learners' needs, and accountability.
2. Improve the stability of the education system.
3. Respect the legislative and constitutional framework for education in Ontario. This would include Public, Catholic, French language and English language school board.

4. Take into account the fiscal situation of the Province.

An interesting sidebar was that the Progressive Conservatives had also plans to phase out the OAC year (grade 13) by 2003.

The educational funding formula had changed around 1998. At that time prior to 1998, school boards were receiving government grants and in addition being able to set the mill rate as a source of funding.

The educational funding system after 1998 allowed the government to set a uniform rate that was based on the tax assessment of a home. The city or town would collect property tax and then send the educational portion to their respective school boards within its jurisdiction.

The system prior to 1998 allowed school boards to levy taxes based on property tax assessment in addition to receiving funding on a per student basis from the Ministry. The school boards that were assessment rich were able to collect funding necessary and able to financially deliver exceptional programming. However, school boards that were assessment poor received less money from property taxes. This uneven educational tax playing field would cause concern for the school boards. Catholic school boards were traditionally in a difficult position due to the reduced assessment base. This uneven assessment field would make it difficult to deliver anything but a reduced form of acceptable curriculum. This issue was exacerbated when a property owner or property renter failed to initiate or declare (elect) their intention to support the separate school
system within their community. In other words, when a home was sold, the property
taxes for that home would default to the public school system. This also occurred when a
renter moved into the home. This default mechanism required the Catholic school board
supporter to initiate their positive support of the separate school system.

The new funding formula objective was an attempt to achieve a basic system of
simplicity of understanding education funding.

The numbers of types of grants from the government were reduced by about
two thirds. It was intended to provide equity to all school boards. It was intended to be
“student-focused funding” (SFF).

The SFF would be the same for the elementary and secondary panels. The
concerns of the EETF (Rozanski, 2002, p.#10) were to:

1. Provide a fair and equitable level of funding for all students where
   they live in Ontario.

2. Provide more funding for students in the classroom and less for
   administration and other non classroom costs.

3. Provide funding to maintain existing schools and to build new schools
   where they are needed.

4. Protect funding for special education.

5. Increase the accountability of school boards by ensuring that school
   boards report consistently on how they spend their funding allocations.

The SSF did not permit the school boards the opportunity to spend more than
was allocated to them. This allocation was divided into 23 categories, commonly named
envelopes.

On page 37, “Policy Trends in Ontario Education 1990-2003” (2003), the statement was made that in December 2002 when the Rozanski report was released, all stakeholders welcomed the recommendations. The stakeholders were encouraging the government to act rapidly on the recommendations.

The government immediately introduced additional funding for different programs in response to the Rozanski (2002) recommendations. In March of 2003, the government had announced a total of $676 million in funding to be delivered over 3 years to school learning resources, special education, and a 3% annual increase in the salary component of the funding formula and student transportation. In April 2003, an additional $75 million had been announced for school renewal and an incremental $74 million for rural, northern, and small schools, and schools with declining enrolments.

In September 2002, the majority of teachers in Ontario were without a contract. In fact, only 31 out of 126 bargaining units had signed contracts. In December 2002, little progress had been made, with 87 contracts still to be renewed. The government responded with additional funding of $340 million in recognition of the Rozanski recommendation to update the student focus funding to avoid classroom disruption during contract negotiations.

The Ministry of Labour recommended that the 3% increase offer was consistent with the salary increases reached with other public sector workers including its government employees. However, the funding was for only 1 year, and the school boards
were responsible to find the following year’s 3% increase from their allocated budgets.

The EETF (Rozanski, 2002) outlined the administrative roles and responsibilities in the Ontario education system. The responsibility of the province of Ontario was to provide an education to its populations through the Ministry of Education. The Ministry of Education would set the structures and funding levels to support the educational goals, policies, and standards and the expectations of the government. Ultimately, (Rozanski, 2002, p.#15) “the Province is responsible to the people of Ontario to ensure that the goals, policies, standards and expectations are set appropriately high and that the structures and funding it provides education are appropriate and adequate for meeting those needs of policies, standards and expectations.” There is a general understanding that this funding must be considered with all the other financial pressures that the province is exposed to from various departments.

It is Mr. Rozanski’s opinion (2002, p.#15) that the province is a policy maker and should not be a micromanager. He continued that as a policy maker and provider of funds, the province has a right and obligation to demand both fiscal and performance accountability from those who spend the funds for public education.

The EETF report (Rozanski, 2002, p.#15) outlined the responsibilities of elected Trustees and the school board(s) to work in consultation with school communities and stakeholders. This process would set local priorities, policies, and budgets that must be within the terms of funding allocations from the province. Trustees are responsible for ensuring that the schools and staff have the credentials and professional capacity with resources to meet provincial and school board policies and local priorities.
Ultimately, the Trustees are to provide education in a cost-effective and appropriate way. The school boards must hold their Directors of Education ultimately responsible and accountable to meet the provincial polices and regulations and school board policies. The school boards are accountable to their stakeholders (electors and their school communities) to ensure they, through individual Trustees, represent the needs of their jurisdiction.

The administration at the school level is to advance the goals of continuous improvement in student learning and achievement. The school principal, as the educational leader at the local level, is directly responsible for setting school policy and continuously improving the quality of teaching and level of learning at the school. Their policies and initiative to drive quality of learning must be in unison with the school board direction.

*School Hierarchy*

The EETF (Rozanski, 2002, p.#17) reported, “that the Ministry of Education and the education funding formula have roles to play in facilitating a strong school community relationship.” However, and this is critical, “that other provincial ministries and other levels of government must also participate and make reasonable and appropriate contributions related to their areas of responsibility.”

As a sidebar and personal comment to the above, should the Ministry of Education be paying for absolutely everything that occurs within a school, or should the different ministries be paying for the support of students with special needs or in need of social services. In this case, the Ministry of Social Services, the Ministry of Health, and
Children’s Services Ministry, etc. could come to school boards with financial assistance.

Other ministries could also be supportive to the students and their parents/guardians.

There were five guiding principles (p.#18) included in Mr. Rozanski’s report (2002). They are:

1. the quality of student learning and achievement;
2. the equity and fairness;
3. responsiveness to local needs;
4. accountability; and
5. affordability.

Mr. Rozanski, during his consultation with various stakeholders, expanded to include the following principles:

1. adequacy;
2. affordability;
3. equity;
4. stability;
5. flexibility; and
6. accountability.

Mr. Rozanski (2002) elaborated on these six items (pp.#18–20) in the EETF report. The principles as noted in the report are expanded and paraphrased below:

Adequacy is linked to both affordability and accountability. To elaborate on this brief description, while financial support is not the only kind of support needed, it is important that it be adequate to meet the objectives school boards, teachers, and students are being asked to achieve.
Affordability is the other side of adequacy. It is recognized that education is not the only public priority and taxpayer pockets are not bottomless. There must be recognition that the money being forwarded by the province of Ontario for education is limited. If this money is limited, ultimately cost effectiveness must be addressed.

Equity means fairness. It is firmly believed that Ontario students deserve equitable access to education and to the financial resources for this quality education.

Stability is planned to have continuous improvement, and school boards are able to in fact predict education funding in the future.

The EETF report (Rozanski, 2002, p.#20) outlines that the principle of flexibility is related to the principle of equity. It suggests that the funding system should be flexible and adaptable so that the school boards can have some discretion in how they assess their local needs and how they spend the money from the funding allocation. The ultimate outcome, of course, is transparency. Flexibility in accommodating local needs cannot exist without transparent accountability.

The taxpayer pays federal taxes, provincial taxes, and municipality taxes. The principle of accountability requires public bodies to spend taxpayers’ money and accept the responsibility in spending it properly.

Sir Richard Elmore, an education researcher, created a term called “reciprocal accountability.” Mr. Rozanski (2002, p.#20) in the EETF relates to Mr. Elmore’s statement about reciprocal accountability. Mr Rozanski suggests that in the context of Ontario’s publicly funded education system, reciprocal accountability means that every demand by the public and the province for improved performance involves a responsibility to provide appropriate resources. All individuals that spend public money
to invest in education, school boards, and their employees must demonstrate accountability for using those resources effectively and efficiently for the purposes intended.

Reciprocal accountability must be transparent. This transparency requires a climate of mutual trust and respect. It requires an eagerness to initiate and accommodate change and a willingness to work and provide resources to sustain it. It is obvious in the first 20 pages of the EETF report (Rozanski, 2002) that funding of education is complex and that funding is needed to deliver education to the citizen to meet the present and future needs of the province.

In Chapter 4 of the EETF report (Rozanski, 2002, p.#21), Mr. Rozanski states that almost everyone he heard commented that the funding allocated to education is inadequate. That is, for virtually all school boards and school stakeholders, adequacy of funding is the issue more than the structure of the formula itself, although there was some reference to the same.

Mr. Rozanski (2002, p.#21) said that many presenters expressed concern about the absence of both an annual process for reviewing and a process to update a formula. The formula must properly reflect the increased costs. It must also look at the regular comprehensive process of reviewing the formula to evaluate how well it is working and whether it continues to meet the province’s objectives and the true cost of education.

How much is enough money to spend on education? The word “investment” (Rozanski, 2002, p.#22) is the key. There must be strategic investments for continuous improvement. Mr. Rozanski agreed that there is a disparity between benchmark costs in the funding formula essentially, set at 1997 levels, and the actual costs for the school
boards today (this report was written in 2002). It definitely does not reflect the costs of 2006/2007.

The recommendation therefore focussed largely on ensuring that funding is maintained at a level that will allow school boards to meet the objectives and initiatives determined by the province and to have regular reviews to update benchmarks that relate to a formula. Mr. Rozanski (2002) made three recommendations to apply to this current school year (at that time), 2002-2003. The three recommendations were:

1. The allocation of funds for school boards current round of collective bargaining for their teaching staff.

2. Funding under the Special Education Grant for approved Intensive Support Amount (ISA) claims that school boards submitted to the Ministry of Education through to the end of the third cycle of the Ministry’s review of ISA funding; and

3. Funding for the immediate cost pressures school boards face related to student transportation.

It is interesting that the above items that Mr. Rozanski (2002, p.#22) commented on were the same three areas that Dufferin-Peel was concerned about and relayed to the Ministry in 2005-2006.

Mr. Rozanski (2002) found it so important to discuss the issue of benchmarking of the EETF (p.#23), he made a comment that school Trustees and Administrators told him that in fact inadequate funding compromised their ability to allocate funding to programs and services. An example is the benchmarks costs set in 1998 to pay for teachers’ contracts. There was a need to divert monies from other areas of school
operations, professional, paraprofessionals’ services, and school libraries to pay for the contracts.

Mr. Rozanski (2002) made a number of recommendations. They are summarized below:

Recommendation 1 (p.#23):
The Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant) to reflect costs through August 2003, and that, funding that reflects these updated benchmark costs be phased in over three years, starting in 2003-04, as part of a multi-year funding plan.

It is interesting to note that in the first Recommendation there is a suggestion to phasing in grants over a 3-year period. The 3-year period would in fact end in 2006-07. Dufferin-Peel may not have been placed in this position of financial instability had this particular recommendation been implemented.

Recommendation 2 (p.#24):
To foster stability in the education sector, the Ministry of Education allocate funds to school boards in the current school year (2002-03) for the current round of collective bargaining with teaching and support staff.

Mr. Rozanski recognized that Recommendations 1 and 2 had an expensive cost component attached to them. However, he did address that his guiding principles of adequacy and accountability suggested that the government provide adequate amounts of funding in the money that was available for the high level of academic achievement that
the government itself expected. It could be that the funding formula will equal a high level of achievement. However, more important, high level of achievement must be sustainable. It could only be achieved by a formula that is reviewed and updated on a regular basis.

Recommendation 3 (p.#24):

The Ministry of Education, in consultation with school boards and other members of the education community, develop mechanisms for annually reviewing and updating benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every five years.

Recommendation 3 suggests that the issue of updating benchmarks be addressed annually and that a comprehensive review would be done every 5 years. If the benchmarking were done annually, DPCDSB would have been able to address its cost components on a regular basis. The next review is scheduled for 2008. There is a scheduled provincial election in October 2007. The Liberal government (if it wins the election) must have the fortitude to move forward in addressing benchmark costs in a comprehensive review in 2008. If the Progressive Conservative government is successful, will they have to move on education funding reform it their first year? They may take time to study the financial status of the province and thereby delay the funding formula review.

The next area of consideration would be special education. The special education grant provides school boards with the money necessary for the additional programs and services required by students who have been identified as exceptional students. There are
two types of grants that are available to the school boards. The first is the Special Education per Pupil Amount (SEPPA) and the second is the Intensive Support Amount (ISA). The SEPPA grant is allocated to school boards based on total enrolment, recognizing that certain percentages of the student population have special needs. The ISA grants are paid out on a basis of per student. There are three levels to ISA grants.

Recommendation 22 (p.#24):

The Ministry of Education review and consider the recommendations in the brief submitted to the task force by the Minster’s Advisory Council on Special Education.

Mr. Rozanski (2002, p.#45) suggested that the updated benchmark costs would provide an extra $88 million for special education throughout Ontario. He also recommended that the Ministry develop a transportation policy for students with special needs.

The transportation policy for students with special needs would provide equity to ensure that all students would all have a similar education no matter where or how they lived.

The statement made in the EETF (Rozanski, 2002, p.#46) is concerning SEPPA allocations for secondary students. SEPPA allocation for secondary students within the funding formula is based on the school board’s average spending levels in 1997. He mentioned that stakeholders maintain that the new curriculum requires extra support for its many students. The students with special needs require an even greater level of support.
The secondary school curriculum was changed to 4 years instead of the 5 years (prior to 1997) with the removal of the OAC year. This reduction will actually reduce the amount of SEPPA funding available to school boards. SEPPA is based on total enrolment, not the number of students with special needs or the time they spend in secondary school. Mr. Rozanski summarized that SEPPA spending for secondary schools is increased to offset the estimated decline in enrolment. This is a result of the reduced number of years in secondary school curriculum, and in addition, that it is being decreased by a further 10% to support a high level of special education programming and services at the secondary school level.

Mr. Rozanski’s (2002) mandate also addressed transportation, and he commented (p.#48) that the existing transportation allocation formula had been carried over from the old funding formula; this funding formula was the one that preceded the student focus funding. It was now revised, and the new funding formula was introduced in 1998. The Ministry established a transportation funding review committee to address a new approach to funding for student transportation. Mr. Rozanski, recognizing increased fuel costs in 2002, asked the Ministry of Education to add $23 million to the transportation grant in 2001-02 and an additional $6.3 million in transition funding related to transportation costs of the school boards experiencing declining enrolment. The government in 2002 announced an additional $20 million annually for the grant. Mr. Rozanski (p.#48) wrote that this money had not yet been included in the school boards’ allocations for the current year. The concerns that Mr. Rozanski heard from the stakeholders in regards to the transportation grant are:
• It does not reflect all of the increases in the cost of fuel and significant increases in the cost of school buses, school bus operators, licensing, inspections, insurance, vehicle maintenance, and safety. It also lacks a review mechanism for dealing with rising costs.

• There are no province-wide transportation guidelines on common walking distances or maximum ride times, especially for students in junior kindergarten to grade 3.

• It does not address school boards' increasing concerns about safety issues and the need for transportation safety programs.

• It does not specifically take into account costs related to the transportation of students with special needs.

• It does not promote or reward the co-operative efforts of school boards that have formed regional transportation consortia.

• By using pre-1998 school board expenditures as the basis for the existing allocation, the grant perpetuates historical inequities because it does not recognize that some school boards had relatively low expenditure levels in the pre-1998 period because they had implemented cost-saving measures.

Mr. Rozanski (2002) agreed the issue regarding student transportation requested an urgent and immediate implementation of a needs-based funding formula. This formula takes into account the actual student needs instead of existing historical allocation. He also recommended that the Ministry of Education build on the extensive
work that had been done by the Transportation Funding Review Committee (TFRC) and complete the development of a needs-based Transportation Grant as quickly as possible.

Recommendation 29 (p.#49):

To foster stability in the education sector, the Ministry of Education allocate the $20 million increase in funding for school transportation that was announced in the government’s 2002 budget to school boards in the current school year (2002-03), and that it direct these funds to those school boards that are most in need, to help them address transportation cost pressures.

The Ministry has been impressed with the many co-operative (throughout Ontario) transportation agreements that coterminous school boards developed over the past few years. DPCDSB and the PBE developed one of the first transportation consortia in 1997. The consortia was created to address the costs of transportation for the school board relative to its students and to deliver a high level of cost effectiveness and efficiencies within the system. It was also recommended that the Ministry of Education should continue to work together to develop a province-wide system for the regional transportation system.

The next area addresses teachers’ qualifications and experience as part of the salary consideration. Mr. Rozanski (2002, p.#50) said there were expressed concerns during consultations that were focused on three issues; they were inadequate funding, the current average secondary school student credit loan recognized by the funding formula, and school boards’ problems recruiting and retaining teachers.

The main purpose of the Teachers’ Qualifications and Experience Grant (TQEG)
was to address the high teacher salary costs faced by school boards that have proportionately higher numbers of highly qualified and experienced teachers. These teachers would be on the higher end of their particular salary grid. Mr. Rozanski (2002) estimated that the updates to benchmark costs would increase the TQEG by $30 million. This would also contain an allocation that recognizes that school boards require more teachers as students are taking higher than the forecasted average credit load.

Mr. Rozanski (2002) said the Foundation Grant provided funding for the number of secondary school teachers required when students were taking an average of 7.2 credits. This was the actual average secondary student credit load in 1997. The Ontario Ministry of Education under the new secondary school curriculum requires students to graduate with a minimum of 30 credits in 4 years. The 30-credit requirement is a minimum, and students may take additional credits if they are inclined to increase the GPA. In the year 2002-03, 50 school boards in Ontario reported average credit loads of 7.5. The Ministry position was that every student would take an average of 7.2 credits, when in fact students took 7.5 credits. The Foundation Grant would cover the additional credits taken by the students. The Grant would acknowledged the higher cost associated when it is necessary to employ additional teachers to cover the students that take higher than average number of credits.

It is interesting that simple math would suggest that 30 required credits divided by 4 years equals 7.5 credits per school year.

The current Liberal government headed by Dalton McGuinty was elected October 23, 2003 with a majority in the Ontario Legislature. The web site developed for students at www.kids.premier.gov.on.ca/english/meet/default.asp (2007, June 12) titled “Meet the
Premier” offers a statement that one of the most important things to him: “is helping students, teachers and school succeed.”

The Ontario Liberal Plan for Education (Excellence for All)

Education Finances

The Ontario Liberal Plan for Education, Excellence for All (EFA n.d.); stated that education has never been more important for young Ontarians and for the province’s prosperity. Mr. Dalton McGuinty in the EFA document sets the following objectives:

• An ambitious achievement targets and supports them with smart investments.
• Helps young children get the best start in learning, before they enter school.
• Ensures that all our children get what they need to succeed in school, as well as later in life.
• Stops the fighting and gets government working together with parents, teachers, schools, and school boards to put schools back on track.

Mr. Dalton McGuinty closes his introduction, “I ask you to be part of the education solution. Read our plan and join me in forming a government dedicated to excellence in public education for all our children. They deserve it. Our future depends on it” (p.#1).

On page 2 of the EFA, Mr. McGuinty stated, “The Harris-Eves government created turmoil for our students by mismanaging their schools and showing disrespect for their teachers. We (Liberals) will bring peace and stability to our schools.” The following highlights the critical area as presented by Mr. McGuinty
Higher Student Achievement Guarantee

Mr. McGuinty offered a guarantee of student achievement. The guarantee read, “Our Excellence for All Plan guarantees that within our first mandate 75% of our students will meet or exceed the provincial standard on province-wide tests” (p.#3). He continued, “Substantial improvement will not come easily, or without costs. It will require cooperation between the government, educators, school boards and parents, real increases in funding, support to schools, and innovative programs.”

Mr. McGuinty also continued, “We will take responsibility for measurable improvement in education. That’s our promise, and we will keep it” (p.#3).

Smaller Classes for JK to Grade 3

“We [the Liberals] will put in place a real cap of 20 students per class in the all-important early grades. Students who begin their education in small classes are less likely to drop out and more likely to graduate on time, and more likely to take challenging courses in high school” (p.#3).

Daily Reading, Writing, and Math

“We will make reading, writing and math mandatory in each teaching day. schools will be required to devote a set number of hours per day to reading, writing and math so that all Ontario students master the basics” (p.#4).

Teacher Excellence

“We will give teachers the tools and the training for excellence. We believe high-performing teachers inspire high-performing students. To support our teachers as learners, we will assist them to continue to upgrade their skills and learn from one another. We will put Teaching Mentors in schools to
share their skills with other teachers and coach them. Teaching Mentors will have release time from their teaching responsibilities to provide strong support and guidance for other teachers” (p.#5).

Our Children Deserve the Best Start

“We will make high quality childcare and education available for our youngest learners. Our Best Start Plan (BSP) is based on our vision of high quality early years education and support as a seamless extension of our public education system. Public schools will become our community hubs, with full-day junior and senior kindergarten eventually available for all four and five-year olds. schools will also offer childcare and parenting programs, as well as supporting childcare providers in the community.

BSP will take time, but we will transform our vision into reality. The first step, to be taken during our first term in government, will be to improve the quality and affordability of childcare available for our families” (p.#6).

Under The Liberal Best Star Plan:

- “Fully 75% of all households with children under four will be eligible for assistance with their childcare costs. That works out to 330,000 children whose families will receive support – a 450% increase over today’s standard” (p.#7).
- “Support levels will be based on income and determined on a sliding scale” (p.#7).
“Our Best Start Plan is the most ambitious early child development program ever undertaken in the province. This important investment in our future is long overdue” (p.#7)

Professional Childcare Standards

“We will enhance the quality of childcare in Ontario by raising professional standards and ensuring that they are met.” Mr. McGuinty stated in the EFA report,

“Under Best Start, parents will be titled to assistance with their childcare costs paid to caregivers who register with the government, undergo a background check and receive ongoing training. This will ensure a steady and significant improvement in the number and quality of childcare providers in the province” (p.#7).

Helping Children with Special Needs

On page 9 of the EFA, the headline reads, “We will help the children who need the most help, those with special needs.” The EFA report stated that the Harris-Eves education cuts and mismanagement have hit kids with special needs the hardest. Right now, almost 40,000 children with learning difficulties are on waiting lists to be assessed and waiting for the help they need to succeed. The Liberals will streamline the $50 million assessment process that was created by the Harris-Eves government. They would let local school professionals, working directly with the parents and children affected, determine who needs special education support.

Mandatory Learning to Age 18

“We will make learning mandatory to age 18. In a knowledge-based economy, it no longer makes sense for young people to be allowed to stop
learning at the age of 16. Many young people leaving school early may be more engaged and better learners in other settings – whether it is in a training program, an apprenticeship or some other form of on-the-job learning” (p.#10).

The EFA report, on page 10, stated that keeping students to the age of 18 would require additional teachers in schools to ensure these students receive their credits.

_Better Schools for Better Learning_

The Liberals would make sure our schools are safe so students can concentrate on learning. The Safe school plan (p.#12) includes:

- Antibullying programs.
- A school safety hotline.
- School surveillance cameras.

_Character Education_

“We will help our schools develop good citizens though character education. Education is about more than reading, writing, and creating good workers. We believe excellent public education should also develop good, well-rounded citizens” (p.#12).

_Creating Well-Rounded Students_

“We believe that learning goes beyond basics. Education must challenge and inspire our kids. It must offer all students the opportunity to experience a full range of learning that includes music, art and drama, as well as sports and other extracurricular activities. These are not frills. These are essential parts of a well-rounded education” (p.#13).
Respect for Teachers

“We will treat our teachers with the professional respect they deserve. After parents, teachers are the most important influence in the lives of our children. We greatly value teachers and the vital role they play in helping our children grow to become responsible, well-educated adults.

We believe our teachers are professionals and should be treated as professionals. We want them to be highly qualified, highly trained and highly valued” (p.#16).

The EFA report, on page 17, has the most telling component on the funding of schools for success. The document states:

“We will not let schools fail because of a flawed funding formula. We will create a fair model to reflect the local needs of diverse communities.”

The EFA reported that the Harris-Eves government tried to run 5,000 schools from Queen’s Park.

“They take a one-size fits all education funding formula and impose it on every school in the province. It simply does not matter to them that remote northern schools have different needs than large downtown urban schools with a diverse immigrant population” (p.#17).

“They fail to recognize that in urban areas, with the highest population of immigrants and new Canadians, there is a great need for English as a Second Language (ESL) instruction. They take no notice of the need for older schools to fix or install new equipment. And they ignore the fact that school
boards in rural and northern regions need funding that reflect the transportation and other costs of far-flung regions” (p.#18).

“We understand that schools in urban, rural, suburban and northern areas have different needs. The funding they receive should reflect the needs of those communities.

Through mismanagement and underfunding of our schools, the Harris-Eves government has set them up for failure. We will set them up for success” (p.#18).

The EFA (p.#19) report states that school boards should be made accountable. The EFA report says that they will ensure that school boards provide strong local accountability and decision-making. It elaborates by saying the main role of school boards is to adapt provincial standards to the needs of students in local communities. The Liberals would ensure that they have the resources and the flexibility in spending those resources to respond to local needs.

Long-Term Funding

It is heartening to note that the Ontario Liberal government will ensure that 3-year funding can actually be achieved. They will set up a fair mechanism to resolve financial disputes with school boards without resorting to expensive and unproductive takeovers.

Ontario Leader, Dalton McGuinty was sworn in on October 23rd, 2003. One of the election promises he made for education was to add another $1.6 billion to the school system, to move away from private school funding and invest further in the public system, and to reduce class sizes.
The articles over the last 3-plus years will be presented using three categories. The three categories are:

- **Post election Period (PEP)**, includes all literature within approximately one year of the election of the Liberal government on October 23rd, 2003 to October 2004.
- **Mid term Period (MTP)** is for a period November 1, 2004 to September 2006.
- **Late term Period (LTP)** will be the period from September 2006 to February 7, 2007.

**Post Election Period (PEP)**

It is obvious in the PEP that the McGuinty government in the first year of its mandate attempted to buy peace on the educational front. This included labour peace as well as working relationship with school boards.

_Globe and Mail_ (Ontario gives $750 million, 2004) reported that the Ontario government gave $750 million to high school teachers. This $750 million to local school boards was to buy 4 years of peace and came immediately after a similar agreement was established with the elementary school teachers the previous month. The Education Minister, Gerard Kennedy, said, “We should in our arrangements give peace as a minimum.” He continued, “that the money would give teachers pay raises over four years and be used to hire more teachers to help struggling students.” The $750 million was used to offer high school teachers a 10.6% wage increase over 4 years.
It was Mr. Kennedy who hoped that the additional monies would slow down the high school dropout rate, which stood at 30% in 2004. He said “he would hope that some of the money would go towards hiring student success teachers at every high school to help struggling students.” The article also quoted Mr. Kennedy as saying, “peace is important, but what is more important is progress, I think what we’re buying is a platform for real progress in the immediate and near future.”

The $750 million followed the $950 million agreement with elementary school teachers and through their school boards. The money was provided to the elementary panel to hire teachers that would be specialists in the areas of music, art, and physical education.

The secondary teachers were without a contract from September 2003 to May 2004.

In September 2004, there were a number of areas that the Ministry of Education and the Premier’s office wanted to address. The areas were:

- issues surrounding labour and labour peace
- teachers spending their own money for supplies in schools
- student boom that hit the 905 schools
- stress of pupils when it comes to the three Rs
- smaller class sizes
- Mr. Robert Munsch addressing teachers and their unions
- government’s position on boosting literacy in Ontario schools
- claw back of special education funding from school boards
- the autism program
- boosting of additional monies for rural schools

- standardized testing by half.

*The Toronto Star* (Kalinowski, 2004c) commented the Liberal government is getting good marks for cutting labour strife. *The Toronto Star* reported that the old antagonism between the teaching profession and the Ontario government had subsided. However, the issue regarding contracts was still percolating in the background because a number of teachers’ contracts expired on August 31st. The Ontario school Teachers Federation (OSTF) had warned Kennedy that it would not be satisfied with a 2% increase that was allocated to school boards for salaries.

The Elementary Teachers Federation of Ontario (ETFO) declared it was prepared to strike if contracts would not include more preparation time for the profession. The teaching federations were looking for at least 200 minutes preparation time in 2007 and the offer was only 150 minutes of preparation time in 2004.

Mr. Kennedy was also hoping to address the amount teachers spent in the provisions they used for out-of-pocket money to cover supplies. *Toronto Star* article (Boyle, 2004a) mentioned the out-of-pocket expense for teachers was almost $600 per year. Mr. Kennedy addressed this issue by looking to the idea of a tax break for teachers when class supplies were being bought with teachers’ own money.

The politics of education took an interesting twist when the *Toronto Star* (Boyle, 2004c) article stated that Robert Munsch was playing political commentator. Mr. Munsch was praising the provincial Liberals for promoting literacy and slamming the former Progressive Conservative government for mismanagement of the education system. Mr. Munsch was quoted in the same article, “I thought the schools needed
something to be done and this government is trying to do something, so I decided to
make a political statement.” Mr. Munsch continued, “I have never done this before, but I
never thought that schools were in such bad state. There has never been a situation like
this before in Ontario.” Mr. Munsch is further quoted, “they wrecked it.” He was
referring to the former Progressive Conservative government (1995 to 2003). Mr.
Munsch had taken issue with the changes to the school funding formula and the reduction
of number of librarians and English as Second Language teachers. Mr. Munsch said, “I
think what the provincial government is trying to do with education and mend its ties
with teachers in the schools are an obvious and wonderful thing to be done.”

In September, the Premier called on teachers’ goodwill with the intention of
buying labour peace in the education sector. Toronto Star (Boyle, 2004b) commented
that Premier Dalton McGuinty was hoping for good will to buy labour peace. He was
quoted, “I think there is more goodwill, there is more desire to collaborate in the interest
of our children, then there has been in a long, long time in Ontario’s public schools.” The
teachers; however, at that time were still balking at the 2% wage hike. Mr. Kennedy was
commenting that anything higher than a 2% increase would compromise the investment
his government is making in schools by reducing class sizes and adding teachers and
support staff. Mr. Kennedy was quoted, “this is a government that has really put its
commitment on the line in terms of education, but we can’t do it alone. We need and are
asking for support staff and teachers to be part of it.”

Emily Noble (Boyle, 2004b), President of the Elementary Teachers Federation of
Ontario (ETFO), agreed that in fact there is more good will between the province and the
education sector and commented the Liberal government at Queen’s Park was a breath of
fresh air. She further stated, “This is a government I give kudos to, to put education back on the burner. They are not taking money out of education, they are valuing students, and they are in fact putting money back into education.” Ms. Noble did say that the 2% wage hike offered by the government was on the low side. Her 65,000 public elementary teachers were prepared to play hardball if they did not get the 200 minutes of preparation time by 2007, which was an increase from the 150 per week in 2004.

On the issue of smaller class sizes, there were rumblings that would be a precursor of the concerns relative to funding, specifically, Mr. McGuinty’s hard cap to put a 20:1 ratio for primary grades. There were issues relative to the availability of space in schools. The Peel school board of education said (McCarthy, 2004) said “the growing student population was putting pressure on the existing facilities in every area of the region. The inclusion of cash would be needed to increase the size of existing schools in order to maintain a goal of capping sizes at 20.” Mrs. McDougald, Chair of Peel school board, commented, “Additional capital money will be required and we don’t have anymore.” She pointed out that the school board already has a $5 million shortfall in the school bus budget and the province had clawed back money that had been set aside for special education. Mr. Kennedy was quoted in this edition of the Mississauga News that he intended to address that issue in a series of meetings with school boards between now September 2004 and November of 2004.

Premier McGuinty (2004, Premier goes to school, promotes changes) visited Lancaster Public school in Mississauga, where Education Minister, Gerard Kennedy, joined him. Premier McGuinty was quoted, “we have over 1,300 schools that are experiencing class size reduction in this September 2004 as a result of our investments.
That close to 40% of Ontario schools that now has smaller classes.” Mr. McGuinty said that the province that would allow school boards to hire an additional 1,100 new teachers this fall and called progress toward the promise to pursue a hard cap size on in JK to grade three at 20:1.

He further commented, saying the smaller classes mean that there will be more attention to the individual, and it means that if they have any special needs, they (students) will not fall through the cracks.

This above article also quoted Ms. Janet McDougald, “we will not add portables for the sake of class size. Our school board has said no and we will not do that. We will be a lot tighter next year and will need additional capital money for space.”

The Ministry of Education news release titled “McGuinty Government Delivering on Small Class Sizes” (2004b) stated that the McGuinty government was investing $854 million in the Ontario public education system to bring the total investment since taking office up to $1.1 billion. This $854 million was providing over 7,500 JK to grade 3 teachers with the latest teaching resources to help students improve their reading, writing, and math skills. This would be through the government’s summer literacy and numeracy training program. It also placed additional specialty trained JK to grade 3 lead teachers in schools across the province and was beginning to train an additional 8,000 lead teachers for grades 4 to 6. The third point he brought forward in the press release was a $65 million increase in the Learning Opportunities Grant (LOG) to help schools implement programs for students who need it the most.

On September 22nd, 2004, the Office of the Premier (2004a) prepared a news release titled “McGuinty Government Strengthening schools for Rural Students.” The
McGuinty government’s $31 million initiatives recognized the importance of rural schools. This money was intended for the benefit of over 1,149 rural schools. They could then strengthen programs, services, and staffing for schools in rural communities. These additional monies were released as recommended by Dr. Rozanski in an effort to improve Ontario’s public education.

An article titled “McGuinty boosts rural schools” (Yourk, 2004) also quoted the $31 million in keeping small schools and rural schools across the province open and properly staffed.

The interesting note is that in a particular article Gerard Kennedy made the statement, “the previous government’s flawed funding formula made rural schools easy targets for closing. We are changing that and putting rural schools back on the map-literally.” This is one of the early announcements that acknowledged the funding formula was flawed.

An article “Autism Program on the Brink” (Kalinowski, 2004a) commented that autistic students’ plans for special education were substantially reduced because funds were clawed back by the Ontario government. The Ministry of Education said it would grant $100 million to special education funding to the Ontario 72 school boards. However, there were new rules for school boards to qualify for the money. The money that was in the special education reserve budgets of school boards was to be pooled. This amounted to approximately $50 million provincially. It would then be redistributed among school boards that could prove they still needed the money for special education.

Mr. Kennedy in this edition of the Toronto Star, said that the changes to special
education funding were necessary in light of doubling in the number of special education students in Ontario. The number used was 54,000 students in 2 years.

In October 2004, the 1-year anniversary of the McGuinty government’s election to the provincial legislature, there were developing issues that seemed to be coming along that may cause future problems for the government. They were on the radar, but no one would react to them.

One was called “Rise of new class system” in the Toronto Star (Boyle. 2004d), where there was a fear of failing standardized testing. Families were starting to pay for private tutoring. This extra costly help essentially would take an emotional and financial toll on many families. Many families could not afford the tutoring.

The article “Newcomers losing ground” (Duffy, 2004) was written with ESL students in mind. There were students who required ESL services coming to the GTA area. This influx was creating an additional burden on budgets at school boards. The ESL issue of the Toronto Star titled “Voices: ESL stories” (2004) continued to address the ESL student and their dilemma.

There was such a concern about ESL students that Kimberly Moran (Voices: ESL stories 2004), commented “that ESL funding is the easiest to cut. It is easy to cut because the people that it hits do not have a common voice in Toronto.” In the same Toronto Star article, Susan Pittman from Guelph on October 4 was quoted as saying, “I’m an ESL resource teacher in Guelph currently teaching junior and intermediate grade students. In my care at present, I have students that are ELD (English Literacy Development). These students need a completely modified program, constant attention and above all
compassion.” It is apparent that the ESL dilemma is putting an undue financial pressure on the school boards.

The Ministry of Education (2004d) issued a press release titled, “Ontarioians asked to thank a teacher.” The McGuinty government wanted to celebrate educators on World Teachers Day. Education Minister, Gerard Kennedy, addressed this initiative. He asked Ontarians to mark World Teachers Day by thanking a local teacher of their choice. He was quoted, “the Ontario College of Teachers commented to him that one in three new teachers in Ontario leave the profession in the first five years.” He was proud mentioning that since taking office one year ago, the McGuinty government had worked to establish a genuine partnership with teachers and education workers and one that respects them as professionals and values the vital role they play.

Minister Kennedy commented on results achieved by the Ministry in the first year. They were:

- Introduced legislation to repeal the previous government’s failed so-called professional learning program.

- Hire more than 1,100 new teachers as a first step in reducing class sizes in the early grades.

- Provided over 7,500 junior kindergarten to grade 3 teachers with the latest teaching resources and techniques through the government’s summer literacy and numeracy training program.

- Trained an additional 8,000 junior kindergarten to grade 3 lead teachers and began training an additional 8,000 lead teachers for grades 4 to 8.
October 2004 was a very busy month. It addressed other issues or initiatives from the Ministry of Education. The *Toronto Star* published the following headlines:

- Delivering gym to the masses (Mallan, 2004)
- Daily activity for students praised (Kalinowski, 2004b)
- More gym teachers may be the way: Kennedy (Physical Education Teachers, 2004)

These articles referred to the additional requirement for delivering gym to the students.

The three articles in the *Toronto Star* appeared one week after Minister Kennedy announced a ban on “junk food” in vending machines at elementary schools. The above Three *Toronto Star* articles provided a culminating news release from the Office of the Premier (2004b). This news release was titled, “New physical activity strategy means healthier Ontarians.” The Office of the Premier press release was issued to establish a comprehensive new strategy to get more Ontarians physically active. This action would contribute to a better quality of life for Ontarians by helping them become more active and participate in sports (Ontario Premier Dalton McGuinty).

Premier McGuinty stated in the news release, “We marked our first year in office by releasing a progress report on our plan for Ontario – one that is all about strengthening our province’s greatest competitive advantage: our people.” He continued (Office of the Premier, 2004) “It’s a plan to strengthen their education and skill, improve people’s health and ensure our prosperity. Active 2010 supports all these priorities.”

Mid Term Period

November 2004, was “math month,” and articles were written regarding the math curriculum.
Mr. Kennedy in the *Globe and Mail*. “Test results prompt Ontario to revise math curriculum” (Alphonso, 2004) comments, “if we don’t act now, we may see these students again—struggling with unemployment, social services and even the justice system.” These comments followed the provincial issued results from the Education Quality and Accountability Office (EQAO) about math. It reported that 26% of grade 9 students in the applied stream performed at the provincial standard of 5 percentage points, up 5% over the previous year. Academic students fared much better, with 68% performing at or above the provincial standard, which was an increase of 2 percentage points over the previous year.

These grades initiated a change in the grade 9 math for the next fall. Mr. Kennedy was quoted in the *Toronto Star* (Brown & Boyle, 2004), “we encounter fully blown crisis with this new curriculum in the grade 9 applied math and that it was the most conspicuous problem.” Mr. Kennedy addressed the issue of change when he said, “the course will be less jammed packed, less language based and more hands-on for students not headed for university.”

The *Toronto Star* article, “Ontario to revise Grade 9 math curriculum” (2004, November 25) stated that Kennedy denied that the Liberal plan would lower the “bar” on the tough 4 year curriculum brought in 5 years ago. The previous math program was brought in by the previous Progressive Conservative government in conjunction with the phased-out grade 13/OAC.

The *Toronto Star* article, “Grade 9 Math Revamped” (Brown and Boyle, 2004) attributed Minister Kennedy saying that he blamed the former Progressive Conservative government for introducing a new curriculum that ignores students who study at what
was previously known as “basic level.” These students cannot get their grade 9 math credit, they cannot study math in higher grades, and ultimately cannot accumulate enough credits to graduate.

The Toronto Star article, “Law to force school until 18” (Brennan, 2004) was announced by Premier McGuinty at the Annual Liberal Policy Conference. He said the only way to deal with Ontario’s troubling 30% dropout rate was to keep students in class until 18 years old.

The Education Minister, Gerard Kennedy, said the new requirement would begin as a pilot project in January of 2005 in a number of unspecified school districts. This initiative would also cost about $70 million per year and affect more than 25,000 students. There would also be an additional $30 million for expanded apprenticeship programs. (Brennan 2004)

The financial pressure continued to build for school boards…

As 2004 proved to offer some unstable months for the Ontario government, the Brampton Guardian, “Smaller class sizes still the goal” (Belgrave, 2004c), stated that reducing the student teacher ratio in primary grades is a multi year task for local school boards. School boards are warned it will require millions of dollars of extra government funding.

The Peel Public school board officials have suggested to Queen’s Park that it must give schools some flexibility on how money is used to address literacy and numeracy needs for their local students.

Toronto Star article “Ontario offers incentives for longer teacher pacts” (McCarten, 2004) and Globe and Mail article titled “Teachers offered richer deal to sign
long-term” (Mahoney, 2004) announced the Ministry’s approach of attempting to have long-term collective agreements for more peaceful, stable relationship with the province’s educators.

The above *Toronto Star* article (McCarten, 2004) announced a plan that included incentives to encourage a 4-year contract, essentially, a $60 million one-time teacher development funding and $10 million per year for adjustments in how salary increases were measured.

Mr. Kennedy told the news conference, “We’re changing the benchmark in terms of how school boards get supported when it comes to salary increases” (McCarten, 2004). He continued, “We’re making that for the first time based on actual salaries that the school boards pay as opposed to an artificial benchmark that saves the government money, but automatically forces school boards to find that money somewhere else.”

Mr. Kennedy said legislation would call for either a 2 or a 4-year contract instead of the present 3 years. Mr. Kennedy concluded in the *Toronto Star* article, “a longer term contract is in the interest of education…we need to get as much stability as possible” (McCarten, 2004).

The *Globe and Mail* (Mahoney, 2004) quoted Mr. Kennedy, “this is … basically a school stability plan which we think will have a positive impact.”

The pushback on this was quite interesting because the NDP leader, Howard Hampton, said the government was engaging in “exactly the kind of top down micro-managing” (see EFA) for which it used to criticize the Progressive Conservatives. Howard Hampton continued to say, “it will lead to serious conflict with school boards, it
will lead serious conflict with teachers and it doesn’t address the real problem and the
real problem is that our schools continue to be underfunded” (Mahoney, 2004).

Mr. Kennedy’s position was that the provincial guideline announced in June of
2004 said the government would guarantee funding for salary increases of 2% in the
current school year, 2% in 2005/06, and 2.5% on the third year of an agreement and 3%
in the fourth year of an agreement (Mahoney, 2004).

The funding may have assisted the salary portion, but did not recognize the
benefits component of teacher income. The benefits portion is approximately 13% of a
teacher’s salary at DPCDSB. A large number of teachers are at the upper level of the
salary grid at DPCDSB. The Ministry of Education did not address this concern of the
school board.

Ms. Rhonda Kimberly-Young, President of the Ontario Secondary school
Teacher’s Federation (OSSTF) was quoted in the *Toronto Star* article, “Province to
encourage 4-year teacher contracts” (2004): “This government continues to
micromanage [see EFA] what happens at the local level.” She continued, “we have a lot
of frustration that the Minister is repeatedly setting the guidelines very publicly for
negotiation and saying at the same time he’s not interfering in bargaining.”

NOTE: There was no comment made in either of the articles relative to addressing the
issues of the cost of benefits.

The Ontario Ministry of Education Press Release (McGuinty government
encourages peace and stability in Ontario’s schools, 2004c) stated the McGuinty
government today announced its intention to proceed to sustain peace and stability in
Ontario’s publicly funded schools. The Ministry of Education the week prior had sent a letter and provided these three points:

- There was support through funding adjustment for salary increases incentives for contracts that are longer term and meet provincial and salary guidelines. They would include one-time teacher development accounts to help cover out-of-pocket training costs for educators, and one-time funding will depend on each school board’s final contracts but could be up to $60 million in total. Ongoing costs of $10 million will be provided to adjust benchmarks to reflect actual salaries that will come from the Ministry’s budget.

- The new requirements for accounting for spending of funds received for provincial initiatives such as smaller primary class size help struggling students and improve viability for rural schools.

- A new dialogue to seek long-term solutions on provincial policies concerning workload issues, the government has invited provincial teacher federations and Trustee associations to participate.

Mr. Kennedy was quoted, “having harmonious relationships within the education sector is very important to students.” He continued, “The provincial government is anticipating where problems could be and is contributing to set the environment for successful local bargaining between school boards and their educational workers.”

The above news release quoted the new supports that it offers the system. They are:

- Provincial guidelines will fund salary increases of 2% in 2004-05, 2% for 2005-06, and for four year agreements 2.5% for 2006-07 and 3% for the 2007-08.
• Increases will be based on actual average salaries currently being paid to teachers and educational workers rather than outdated benchmarks at an annual cost of $10 million.

• Up to $60 million in one-time funding for teacher development accounts to support ongoing training that has been traditionally paid for by teachers out-of-pocket if agreements meet provincial guidelines.

• Guaranteed funding each year for school boards once they have entered into a two or four year agreement subject to regulatory approval.

• Legislation if passed would change the existing 3-year terms to two or four years for all teacher agreements.

• The ability to reopen 4-year agreements after two years if the provincial government’s revenues are sufficiently higher than predicted.

A critical component of this Ontario government news release stated “New Requirements.” This is where school boards are required to demonstrate funding has been used for key government priorities that included primary class size reduction, keeping good schools open, and support for students who are struggling the most; examples would include ESL students, low income, single parent, and new immigrant families (Ministry of Education, 2004c).

The Ministry of Education addressed the issue titled “New Dialogue” where certain issues affect teacher workloads in schools. This would include some aspects of preparation time for elementary schools and the average number of classes taught by secondary teachers.
The press release continued, “provincial organizations have often indicated that some provincial policy and/or funding actions are required on these issues” (Ministry of Education, 2004c). These groups have been asked to participate in new dialogue on these particular matters. The government should be applauded through taking initiatives.

*Toronto Star* (Brennan & Brown, 2004) reported on an interesting turn of events where the OSSTF filed a complaint of unfair labour practice with the Ontario Labour Relations school board. They claimed a serious breach of protocol by Minister Kennedy for directly communicating with local union presidents and bypassing their provincial executive. OSSTF President, Rhonda Kimberly-Young said, “We do want to have a positive relationship with the government, but the key to that is respect for each other’s role and going around the union leadership does not lend itself to peace and stability.” Kimberly-Young continued, “we do not expect any Minister of Education to stand up and dictate the percentage of increase teachers will get over the next four years, that’s micromanaging the system.”

New Democrat MPP Rosario Marchese (Trinity/Spadina) said that the Liberals had their own interest at heart in recommending a 4-year term (Brennan & Brown, 2004). Mr. Marchese continued in the article, “they do not want to deal with the fact that the system is underfunded and hope they can get away with saying, “we want peace and stability and four year agreements will do it.””

Progressive Conservative MPP Frank Kleese (Oakridges) asked Speaker Alvin Curling to find Kennedy in contempt due to first notifying teachers of his intention prior announcing it in the legislature. Mr. Kleese told the legislature, “every member in this place should reserve the right first to see the legislature, second to have an opportunity to
debate it, and third certainly to have the opportunity to vote on it before the Minister of
Crown issues his directives to bargaining units across this province, to school boards of
Education and to Directors of Education.” Speaker Alvin Curling reserved his decision
(Brennan & Brown, 2004).

In a Globe and Mail article titled, “Ontario schools pressed to offer autism
therapy”, parents launched a class action suit against the Ontario government and the
province’s school boards for failing to provide intensive one-on-one therapy that will
allow their children to benefit from public education (Philp, 2004).

The lawsuit estimated that there were as many as 10,000 autistic children in
Ontario (Philp, 2004). Mayor David Miller was quoted as saying, “these are kids who
require Applied Behavioural Analysis (ABA) in order to be able to remain in the
classroom and benefit from education they would get there. Because they do not get the
benefit of this, they are not able to function in school, they are not getting an education
and they will not be able to function in the community and live independently. That’s
something the parents can’t accept.”

The Ontario Children’s Services Ministry funds Autism therapy for children, but
the waiting list, as the newspaper continued, are long (Philp, 2004). The article stated
that the “last month found poor record keeping, accounting, and evaluation of results.”
The article stated, “Many children do not receive treatment before their 6th birthday,
when the funding abruptly ends on the presumption that the education system takes over.
The trouble is, the school boards have repeatedly refused to provide therapy.” This
lawsuit, which was launched is the second class-action suit to be filed against the Ontario
government over the last 2 months over this particular issue, it was an attempt to deflect
the problem that relates to the education system.

The Ontario Ministry of Education issued a press release (McGuinty Government
Celebrates Progress by Education Sector, 2004a) to celebrate achievement over the past
year. This release stated that efforts have supported an improved student achievement
and created new respect for teachers and educational workers and more peace and
stability in Ontario’s schools. Education Minister Gerard Kennedy stated, “over the past
year there has been genuine partnership within the education community and we have
seen a renewed atmosphere of respect and cooperation emerges following years of
turmoil and tension.” He continued, “the determined efforts of all involved have already
produced fruitful results on behalf of students and educators.” The press release quoted
the following new initiatives that benefit Ontario students:

- **Assistance for improved literacy and numeracy including smaller class sizes**
  
in 1,300 schools. Successful summer teaching development successions.

- **Lead teacher training. Paving the way for literacy, numeracy.**

- **New supports for struggling students in secondary school through expanded**
  
student success program and curriculum changes.

- **$1.1 billion in new resources allocated to improve the learning environment**
  
in schools despite serious financial pressures.

- **Recognition of distinct rural and urban needs of students within the funding**
  
formula.

- **Expansion of English as a second language support.**
• A new healthy school’s outlook that revitalizes roles for schools as hubs of community activity through community use of schools and the restriction of junk food in elementary schools.

• The establishment of over $2 billion good places to learn infrastructure fund will repair crumbling schools.

• Enhance respect for teachers through consolation of the professional learning program as well as revitalization of the College of Teachers.

• Higher respect for local Trustees through restoring control of supervised school boards of education to their elected representatives.

• An innovative education partnership table for collaborative decision making by sector leadership about educating policy and e-based Ontario Provincial Education Network (OPEN) for involvement of parents, teachers and students alike.

• A new safe schools action team to implement the government’s plan to make schools safer.”

Mr. Kennedy was quoted at the end of the article as stating, “we’re proud of the work that has been done so far, but we recognize that there is still much to do. We’re looking ahead to even a more successful year in education in 2005.”

The Toronto Star printed the article (Boyle, 2005) concerning Ontario’s teachers wanting additional prep time to address union concerns. President of the Elementary Teacher’s Federation of Ontario was expecting a union mandate to strike in its quest for additional preparation time. President Noble said, “teachers are seeking 200 minutes of preparation time a week up from the current average of 150 minutes, and they have been
without a contract since August of 2004” and was expecting a very strong, solid support on the strike votes.

Later in the month of January 2005 the Toronto Star article, “Minister Promises Big Changes in school Funding” (2005) said that “Ontario schools will see significant changes in the funding formula next week which will include grants for reducing class sizes and a procedure for closing schools.” The Minister of Education was reported to say, “there is funding for class size reduction and so on that are implicated by this. It’s the viability of small schools, the effectiveness of some of the rural school boards, state of repair and function within their school buildings.” The Toronto Star wrote, “the government has no intention of completely overhauling the much aligned funding formula.” Kennedy called the changes “very significant.” Mr. Kennedy went on to say, “we have made very substantial changes already in the funding formula, this will be another step in that.” The Toronto Star article said that the Minister would also announce how $2.1 billion worth of funding to repair and renovate deteriorating schools will be allocated.

Ms. Annie Kidder of The People for Education (PFE) said, “We need a redesign of the funding formula, there are now so many different grants that…it’s actually kind of hard to find your way through them. We need one comprehensive, well thought out long term strategy” (Minister promises big changes in school funding, 2005).

The Globe and Mail article (Alphonso, 2005b), “Work to rule campaign gaining support” touched on the issue of Ontario elementary school teachers threatening a work to rule campaign in March and would be on strike as early as September unless their demands for additional money and preparation time were met. Emily Noble, President of
the ETFO, stated in the article, “I am optimistic quite frankly that these strike votes are going to be sending a strong message to the school boards and the school boards are going to start taking negotiation seriously” (Alphonso, 2005b).

The teachers were asking for 200 minutes of preparation time a week by 2007, up from an average of 150. The Minister of Education, Gerard Kennedy, said on February 2nd, “that the talk of a labour action is premature.” He continued, (Alphonso, 2005b) “The strike votes are a negotiating tactic and parents and students should not worry.” He then said, “some of the manoeuvring that goes on when school boards and federations line up to reach agreements, but I think frankly right now the mood is good in education.”

Premier Dalton McGuinty, in the above article, said he echoed Mr. Kennedy’s sentiments and called on teachers to work with school boards to reach an agreement. “The only way we are going to get where we want to go which is higher public quality public education for all our kids is by working together” (Alphonso, 2005b)

In a follow-up article (Alphonso, 2005a), “Elementary teachers vote to strike”, it was reiterated that the work to rule campaign would begin in March 2005 if negotiations stalled.

In February 2005 an article in the Mississauga News titled “Interest shown in Peel schools” (2005) mentioned that the Ontario Education Minister had a meeting with Peel District school board Chair Janet McDougald and the Vice-Chair Ruth Thompson in November of 2004. The discussion was focused on issues concerning the school board, most notably the additional classroom space that will have to be built to achieve the province’s cap of 20 students per class in the primary grades. They also discussed their $30 million shortfall between what the school board pays in salaries and what the
province provides in funding for salaries, enrolment growth, and special education funding.

The *Toronto Star* in its article on Special Education, titled, “School boards’ plan aims to cut red tape”, (Kalinowski, 2005c) highlighted the fact that school psychologists and social workers spend more time with the special need students and less time in paperwork under the special education plan that was being proposed by the Ontario school boards.

In 2005, school boards would have to apply for special education funding every year, which is a complicated and time-consuming task. The school boards called for more accountability in terms of assessing whether students’ Individual Education Plans (IEP) are proving effective. The plans are completed for every special needs student identified by school boards. David Walpole, the Ontario school boards Association (OSBA) Director of Program Policy (Kalinowski, 2005c), said that every school board is going to have to file a plan which indicates how they are going to measure the progress of students who are receiving funds for special education.

In this article, Education Minister Kennedy announced that he wanted to create a less bureaucratic and more accountable system for special education funding. The cost to the province was approximately $1.8 billion (Kalinowski, 2005c).

The Minister had also taken away the Ontario school boards’ special education reserves. These funds had not been spent because the annual grants had arrived too late for the money to be allocated. It was estimated at that time there were $50 million, which was to be redistributed to needy school boards. In February 2005, it appeared that the
money and the criteria for allocating had not been announced. That comment was attributed to Amanda Olvero, Spokesperson for Education Minister (Kalinowski, 2005c).

Valerie MacDonald of Toronto was quoted in the article as saying, “as a parent of a special needs child, it drives me crazy the way you have to talk to one Ministry and then another and then another” (Kalinowski, 2005c).

The school boards were not suggesting; however, that special education funding be attached to individual students. The school boards wanted to maintain a system whereby school boards would determine the best way to spend educational funds. Parents found difficulty with this process because they felt that their child would not be getting the resources even though they had been identified as requiring special needs (Kalinowski, 2005c).

Minister Kennedy delivered a partnership plea and it was reported in the Toronto Star, “Schools need $1 billion fix, teachers say” (Brown, 2005a). He urged the teachers to set aside the stress to government born of 8 years of Progressive Conservative budget cuts and agreed to forge a new education partnership.

President of the OSSTF, Rhonda Kimberly-Young, credited the government for pledging $1.1 billion more to education since taking office. However, the school boards required a full $2 billion fix, as urged by Mordechai Rozanski to ensure labour peace and success with students. She was reported to say, “we know the government has reinvested in education, they’ve only spent about half the amount recommended in the Rozanski report (2002) and that’s the base funding we believe school boards need to provide good programs and settle contracts” (Brown, 2005a).
Ms. Rhonda Kimberly-Young stated, “the Minister said he would like us to work together and frankly there is nothing we would like more, but essentially we have hit the wall in many of our negotiations across the province and in order to have settlements, the government is going to have to make some changes in funding so that these local negotiations can happen” (Brown, 2005a).

The *Globe and Mail* article, “Deal to bring peace to Ontario’s public elementary schools” (2005) reported that the Ontario government had bought peace with the province’s public elementary school teachers at the cost of $960 million to local school boards. Minister Kennedy commented in the article that the McGuinty government has taken a new approach to ensuring peace and stability in our schools. He further said that as a unified agenda amongst government, teachers, and school boards that was without precedent and was necessary because peace and stability are prerequisites for progress.

The article commented that Progressive Conservative critic Frank Kleese accused the government of being financially reckless. He was quoted as saying, “Gerard Kennedy has been given a blank cheque by this government” *Deal to bring peace to Ontario’s public elementary schools*” (2005). Mr. Kleese was arguing that extending the deal to other unions would cost billions of dollars and ensure the Liberals could not meet their commitment to balance the provincial budget by 2007.

The *Toronto Star* article titled “$960 million deal for teachers” (Kalinowski, 2005b) are generally outlined as follows:

- The agreement offered 200 minutes per week of preparation time at the end of 4 years.
• Some of that time will be covered with hiring of additional 1,300 specialist teachers. These teachers are responsible for music, arts, library, physical education, literacy and numeracy. This would be at a cost of $91.9 million by 2008.

• The terms of agreement covers September 2004 to August 2008 included a 10.2% wage increase over the entire term of the contract.

• Teachers would also get a one-time reimbursement of $500.00 for out-of-pocket training expenses in the next year, which cost the government an additional $25 million.

• The government also would establish a provincial stability commission so that problems coming from the agreement would be negotiated during the agreement.

• This agreement affected public elementary schools only. The Catholic and French teachers’ negotiations were still underway.

Ms. Annie Kidder of the Provincial Parent Group, People for Education, was pleased with the prospect of labour peace. She also commented that parents would be happier when they see gym and music teachers (Kalinowski, 2005b).

The Toronto Star, “High school teachers get new deal” (2005) reported that labour peace for Ontario’s 50,000 public high school teachers came with strings attached when the government presented a collective bargaining framework for school boards. This framework included the creation of 1,300 new teaching positions to support students struggling academically, and the Ontario Secondary school Teachers Federation supported it.
The article continued to report that the offer expired in 4 weeks and was contingent on teachers signing long-term contracts. The framework would draw on negotiations with salary increases of 2% in each of the first 2 years, 2.5% in the third, and 3% in the final year. The province also agreed to .5% above those salary guidelines in the final 2 years if inflation rates and government revenues warranted. The entire package estimated to cost the provincial taxpayer some $750 million. Education Minister Kennedy said, “Peace is important, but what’s more important is progress. I think what we’re buying is a platform for real progress in the immediate near term” (High school teachers get new deal, 2005).

In the same newspaper, the article, “Sorbara to deliver Ontario budget May 11” (2005), the article addressed the Ontario Liberal government’s provincial budget announcement for May 11th, 2005. A comment was made that financial pressures on the province come from the new deals with school boards to give elementary and high school teachers raises of 10% over 4 years and that would add approximately $1.7 billion of educational spending (Sorbara to deliver Ontario budget May 11, 2005).

The Toronto Star article, “Report: $1B needed to save rural schools (2005)”, addressed the issue of the province’s per pupil funding formula. Ms. Kidder of PFE said the key problems of province per pupil funding formula puts smaller schools with declining enrolments at a disadvantage. She also said that rural school boards costs have increased up to 17% since the formula was introduced in 1997, but the funding formula has remained static and failed to meet today’s real needs. She was quoted, “there is at least $1 billion of base funding needed to be added to the funding formula in order to
shrink the gaps between actual costs and the funding provided and between school size and the school sizes in the formula.”

In retrospect to July 2002, The Toronto District School Board (TDSB) was at a standoff with the Progressive Conservative government at that time. The TDSB at that time was claiming underfunding by the Progressive Conservative Government, and it refused to make cuts necessary to balance the budget as required under the Education Act. At the end of that summer, then Education Minister Elizabeth Witmer (Progressive Conservative) appointed the Supervisor, Paul Christie, to take control over the school board from its elected Trustees. The Toronto Star article, “Toronto trustees girding for ‘war’ again?” (2005) said that Dalton McGuinty (Leader of the Opposition) and Gerard Kennedy (Liberal Education Critic) blasted the move of a Supervisor being placed at the Toronto Public School Board.

The article went on to say that after a period of a little over a year, Premier McGuinty and Minister Kennedy, in one of the first acts of government, removed the Supervisor in an effort to restore local democracy (Toronto trustees girding for ‘war’ again? 2005).

The article commented that Kennedy began throwing money in the direction of the Toronto Public District School Board. The amount was $217 million more than the previous year under the Progressive Conservatives; however, there was a declining enrolment of 20,000 students. The Toronto Star (2005b) article commented that the Wednesday previous, the school board submitted a balanced budget. However, it was a preliminary budget, and the Trustees said they served notice to the Ministry that they reserve the right to reopen it in the fall and vote for higher spending. This was even if the
school board might go into an illegal deficit position (Toronto trustees girding for ‘war’ again? 2005).

This may be the beginning of the escalating and public budget deficit dilemma for the Liberal government.

In the Toronto Star (Kalinowski, 2005a), Minister Kennedy said that “they are in their second year of a 4-year program to cap class sizes and it is from our viewpoint ahead of schedule, but it still takes the full four years to make sure we reach the cap.” The newspaper commented that in fact capping classes in primary would hit speculative costs of $370 million, most of it for additional teachers. There was no reference relative to the additional space required in this particular article to meet that particular cap.

The Globe and Mail, “Ontario gains on class sizes, falls short on funding” (2005) article commented that in fact the new report in Ontario schools saying that the government is lowering class sizes in primary grades but has fallen short on funding for school transportation and a policy to keep small schools open. It also made a comment in the second paragraph that the mid-term report by the lobby group People for Education said that the government of Premier Dalton McGuinty had fallen woefully short in overhauling the outdated funding formula.

The Globe and Mail commented that Annie Kidder, Executive Director said schools do not have enough cash to cover the rising cost of busing children to class and are struggling to make ends meet. It was also mentioned that the funding formula forces school boards to put building of new schools on hold (Ontario gains on class sizes, falls short on funding, 2005).
The *Globe and Mail*, “Improvements noted in Ontario schools” (2005), mentioned Annie Kidder, the Spokesperson for PFE, said “that in some areas, they’re doing well and they are certainly on target in terms of promises that they made”. She continued, saying that while parents are grateful for the changes, the education sector is still not being funded properly. She referred to a landmark report by Mordechai Rozanski in December 2002 that painted a grim picture of the province’s school system. The article was used as a reminder that Dr. Rozanski, who was commissioned by the previous government, recommended that an injection of $1.8 billion over the next 3 years to do everything from special education to school repairs was required in the province’s education system. This was in addition to the base education funding.

The *Toronto Star* article, “School funding still failing, group says (2005), had a comment made by Education Minister Gerard Kennedy where he said the government had put the Rozanski request for money into schools and is working to updating the funding formula. Mr. Kennedy was quoted as saying, “I make no apologies for taking careful overhaul of the funding formula. What we saw in the past was a lot of reckless changes – a one size fits all formula – it takes time to fix the funding formula.” He continued by saying, “We have dramatically changed that formula to the benefit of the students.”

In the November 21st, 2005, “School funding still failing” (2005) article, a comment was made by Loyola Catholic school Chair, Sharon Hobin. The comment was that the DPCDSB is facing a $17 million deficit. It was obvious that November 2005 was the start, and the funding issue was coming to the forefront of the public concern.
In the *Globe and Mail* article titled, “Parents Protest as Ontario Appeals Autism Ruling” (2005), the government appealed the decision of Madame Justice Frances Kiteleyof (Ontario Supreme Court), where she said the province violated the rights of autistic children when they cut off treatment programs in the educational system at the age of 6. The article quoted that in fact parents were overjoyed with the decision, but were disappointed when the government said that it would launch an appeal, which was going to be heard the week of December 6th by a panel of three judges.

The issue of English as a Second Language came forward in the *Toronto Star* article “ESL children failing: Report” (2005) where the OPSBA said that even though education may be a provincial responsibility, if the federal government is going to bring more immigrants to Ontario, it needs to provide the funds to educate them. Association president, Rick Johnson, commented that the federal government can set the (immigration) numbers, but the schools have to provide the basic training to children. He continued to say that the province provides $3,000.00 in ESL funding over 4 years when a student arrives from a non-English-speaking country and the federal government gives a one-time grant of about $200. The Curriculum Coordinator for York District school board, Jill Maar, said that in fact research shows that it takes 5 to 7 years to become proficient in writing English.

The *Toronto Star* article titled, “Parents, schools fight $1.8 billion in special needs war” (2005) said that the future of 300,000 children is hanging in the balance. These children are coping with everything from physical, developmental, and learning disabilities to autism and other conditions that affect behaviour. A committee that
studied this issue would give an interim report to Minister Gerard Kennedy before Christmas.

The article continues, “we have to do better at communicating”, said co-chair Kathleen Wynne, Parliamentary Assistant to Kennedy. Working committee’s initial mandate was to look at funding which stands at $1.8 billion for this school year. Wynne and Co-Chair, Sheila Bennett (Associate Professor at Brock University) changed that to include everything from teacher training and parent satisfaction to accountability. Kathleen Wynne said, “The mandate has to be broader than funding because we can’t get the funding right unless we know the outcomes we want.” There is a quote in the article saying that learning disabilities are the biggest source of special needs in schools, accounting for 43% of the 187,375 students identified as exceptional. There are currently 20,000 educational assistants and almost 300,000 children receiving special education services (Parents, schools fight $1.8 billion in special needs war, 2005).

Late-Term Period (LTP)

The late-term period opened in terms of number of articles written by the local media. The first article was written on February 1, 2006 by the Mississauga News titled, “Trustees under fire from Education Minister” (MacBride, 2006d). The reporter wrote that the Ministry officials are insisting that the $15 million deficit at DPCDSB is a case of mismanagement. School board representatives say they cannot balance the books without slashing programs in a major way. Trustees met with the Ministry on February 1, 2006. Mr. McBride commented that in fact the school board had met on two previous occasions, discussing much but agreeing on very little. The school board chair, Mr. Peter
Ferreira, said we were not looking for a $15 million bail out, but an opportunity to have a fix for the funding formula.

The feud intensified when (Ministry of Education, 2006b) an open letter from the Minister of Education, Gerard Kennedy, was written concerning the financial status of DPCDSB. He opened up the letter by saying, “I am writing to update parents, students and staff and the public on a provincial review of the Dufferin-Peel District school board financial status.”

The second paragraph commented that the McGuinty government had invested over $2 billion more annually to support students in a publicly funded education since taking office (Ministry of Education, 2006b). The DPCDSB has received its full share, with $100 million funding in 2005 compared to 2002-2003, an increase of 19%. This means that the support for each DPCDSB student has increased from $6,500 in 2002-03 to $7,489 in 2005-06, which equals a $989 addition funding or 15% more per student. He continued that the Ministry has had a series of meetings with the school board since last June to determine the basis for any potential deficit and arrive at a solution. Meetings were also held through joint working groups, which had their final meeting on the Wednesday prior to February 3. Minister Kennedy mentioned in this open letter that in fact he would be appointing an outside investigator who would provide a clear picture of the school board’s finances, its management process, and options for solutions. The document was posted on the Ontario Ministry of Education website, in the section called “Status to Date.” Minister Kennedy stated that the Ministry’s principle concern is that the school board’s recent spending has increased at a higher rate than increases in
enrolment, inflation, or the rate of growth at surrounding school boards (Ministry of Education, 2006b).

He continued in this press release that the school board had planned spending increases this year of 6.8% over last year despite school board enrolment having grown only by 1.9% and salary cost increases of approximately 2%. If a more carefully planned level of spending had been followed, the deficit could have been much lower or potentially eliminated (Ministry of Education, 2006b).

The press release stated that there are certain non classroom areas such as administration that appear to be significantly higher than spending at comparable school boards. It also said that after examining the three areas where the school board has expressed funding concerns (teachers’ salaries, transportation, and special education), the Ministry believes that the school board’s situation with respect to these challenges has actually improved significantly rather than worsened in the 2 years. The document reported the school board has been using proceeds from one-time surplus to meet its financial obligations for the past 2 years. This has apparently been done without a plan for ongoing viability, a management practice that is in itself the source of some concern to the Ministry (Ministry of Education, 2006b).

The article concluded that the government is in its second year of a 4-year plan to improve and build confidence in Ontario’s publicly funded education system. He certainly agrees that more needs to be done. In fact, some 20 of our school boards recorded surpluses at the end of the last school year (Ministry of Education, 2006b).
Table 16

2005-06 Revised Estimates Compared to 2002-03 Actuals

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>up 19%</td>
</tr>
<tr>
<td>Number of Students</td>
<td>up 3%</td>
</tr>
<tr>
<td>Inflation</td>
<td>up 7%</td>
</tr>
<tr>
<td>Spending</td>
<td>up 27%</td>
</tr>
</tbody>
</table>

Source: Ministry of Education – News Release - February 2006b
The final comment was, “I want to assure you that we will maintain an atmosphere of mutual respect, and that interests of students remain at the forefront of every consideration” (Ministry of Education, 2006b).

In the *Globe and Mail* article, “Investigator appointed to resolve school board dispute” (Alphonso, 2006), Mr. Ferreira described the appointment of an investigator as a second opportunity to resolve the issue. He commented that he hopes it will prove the school board officials are not lying. The *Toronto Star* article “Province probes board” (Kalinowski & Brown, 2006) reported on a comment made by Mr. Ferreira that a school board commissioned audit last month found no irregularities in its spending and management practices, the school board said yesterday. Mr. Ferreira said the school board would cooperate with the investigator.

He continued to draw attention to the funding situation in the *Mississauga News* (Battle lines drawn, 2006) when their opening comment was, “A dispute between Education Minister, Gerard Kennedy and DPCDSB escalated quickly from a brush fire to a bonfire.” The comment was, “what happened to the new education government” that was going to stop micromanaging from Queen’s Park? This is a dispute for the Liberals as they try to balance their budget, yet appear to be progressive on a key issue that helped them be elected. Both sides have ammunition in this dispute.

*Mississauga News,* ” 15 million deficit - School board under fire” (Stewart, 2006) reported that Trustees on a previous Thursday were reinstating a letter writing campaign to the Ministry. School board Chair, Peter Ferreira, said under-funding is not just a DPCDSB issue. It is a province-wide issue; we are just the tip of the iceberg. He continued by saying that any audit must take into consideration the cumulative, chronic
under-funding that has put serious pressures on this school board for years. Anything else would be a sham with an obvious predetermined outcome.

*The Catholic Register* also took part in this discussion with the article “Board, ministry open discussions” (Swan, 2006), where it stated that the two sides began meeting January 18th to see whether they could come to an agreement on the state of the budget and in fact that the school board had printed 95,000 postcards which said, Mr. Premier help us, don’t hurt our schools. They reported that parents had signed and returned 33,000, which were delivered, to the legislature. There was a comment made by Wellington Director of Education, Don Drone, that he suspects the troubles occurred when it was required that the school boards were to have labour peace by signing 4-year agreements with the unions. His comment was that the deals forced the Catholic school boards into immediately paying the same salaries as public school boards. It was a big leap for many school boards that had previously been able to get away with lower wages in exchange for better benefit packages or more preparation time.

The first week of February was very busy with articles in various media. The *Toronto Star* article titled “Deficits are sore subjects for schools” (2006) wrote that indeed five other school boards were running deficits. They were Toronto Catholic, Upper Canada Public (Brockville/Cornwall), Wellington Catholic (Guelph), Bluewater Public (Bruce Peninsula), and Algonquin and Lakeshore Catholic (Kingston/Belleville). It also pointed out that the Toronto Public was also running a deficit of “just” $10 million, which was in fact 1% less than its total budget, and it was considered to be essentially balanced. The comment was made that most of the new money that had been given to them was tied to specific improvements mandated by the province, like class
caps in junior grades. The article said that the Toronto District school board (TDSB) says this problem dates back to 1998 when the Progressive Conservative government took the power to levy taxes. The Ontario government had an alternative as stated in this article to agree to advance more money to the DPCDSB and other school boards struggling with deficits or reluctantly take over the operations of any school board.

Education Minister Sandra Pupatello, in the Toronto Star article titled, “Schools still under-funded, group says” (Meoni-Poon,, 2006), acknowledged that the funding formula that was in place has not been changed for years and does leave some schools short of cash. Since 1998 when that formula was founded, there were significant problems from day one and the levels or benchmarks that were set have never been adjusted. The Globe and Mail article, “There is peace in the schools, but is that good enough?” (Campbell, 2006) had an in-depth discussion with Annie Kidder (PFE). In that article she comments “that in fact there has been much progress in the areas where the government targeted its spending, for example, classes are smaller and the government is halfway through its goal of achieving 90% of classes in Kindergarten to Grade 3 capped at 20 students.” Targeted spending has allowed the government to issue more flashy news releases than if it had simply hiked more grants. “I don’t want to call it a cynical ploy because I don’t think it is.” “But I do think there is probably better ways that we could be spending our money.”

In the article (Campbell, 2006), it says that school boards are finding it difficult to comply with class size caps because the government provides less for teacher salaries than the contract had negotiated and that in some cases schools don’t have space for new classrooms and are pushing out rooms designated for music and other programs. The
article also continued to state that the villain is the funding formula that was devised by
the previous government that set amounts in 1998 for salaries, maintenance, and busing.
It has been outdated from the outset and frozen for 7 years. The concern was that the gap
between theory and reality was approaching $2 billion (There is peace in the schools, but
is that good enough, 2006).

Minister Sandra Pupatello, who took over the education portfolio about a month
previous in April, said in the same article, “we know we have more work to do, and we
promise a revamp of the funding formula.” The Toronto Star article “Schools still battle
with cash shortfall” (Urquhart, 2006a) written by Ian Urquhart reported that, during 2 and
a half years as Education Minister, Gerard Kennedy did much to restore peace and
stability in the province’s public schools after a turbulent 8 years of Progressive
Conservative rule. He continues to say that in the 2003 election platform, the Liberals
promised to fix the flawed funding formula, but once in office, Kennedy gave the highest
priority to other Liberal promises such as reduction of class sizes in elementary school.

Thus, Sandra Pupatello inherited the funding formula problem when she took over
in April. At one point, it said that Pupatello made her first step towards fixing the
formula when she increased overall spending in education by 3.55% or $600 million,
mostly going to teachers’ salaries. Minister Pupatello addressed transportation with a 3-
year plan to provide extra funding, but only if public and Catholic school boards would
agree to work together with shared resources. Dufferin-Peel and the Peel Catholic
District school board had a program in place since 1998. Minister Pupatello mentioned
to him (Ian Urquhart, 2006a) that she believed that 97% of the funding formula was
solved.
In the area of special education, Minister Pupatello bought time by extending the formula to the previous year’s levels (Urquhart, 2006a).

In the last few paragraphs, Ian Urquhart (2006a) made a couple of interesting comments when he said that Queen’s Park should give the school boards back some taxing power of up to 5% of their budgets to raise money for local priorities. He continued in referencing former Toronto Mayor, David Crombie, who had recommended this option to the previous government but was ignored by the Tories.

The *Brampton Guardian* article “‘Special advisor’ may be appointed to board” (Belgrave, 2006i) said that Minister Gerard Kennedy released the critical investigator’s report of the school board’s financial management practices in April. A 42-page document included some 26 controversial recommendations and cost-cutting proposals. The day after the report was released, Minister Kennedy resigned his seat at Queen’s Park. Minister Sandra Pupatello proposed an appointment of a special advisor to the school board to find solutions. School board Chair, Peter Ferreira, replied that the Trustees would take a closer look at the terms of reference and find out who the person would be reporting to before deciding to accept the Minister’s proposal. The Trustees wanted to ensure that the special advisor would not be a facilitator or supervisor in another name with the control of the school board’s operations and it’s decision-making. At this time, the budget deficit went from $15.1 million to $8 million due to actions taken by the school board to reduce the deficit. It was reported that, according to Minister Pupatello, the special advisor would work with and report to the school board, not her office.
The *Brampton Guardian* article (Belgrave, 2006a), “Catholic school board accepts advisor”, stated that school board Trustees accepted the Education Minister’s appointment of a special advisor. The Ministry sent to the DPCDSB the terms of reference for the advisor indicating the appointee will report to the Assistant Deputy Manager and the Board of Trustees. According to the Trustees, the Ministry previously assured the school board members an advisor would report only to the Trustees. There was an attempt by Trustees to alter the terms of reference so the advisor reports only to the Assistant Deputy Minister. It also wanted impact statements on any recommended solutions to the budget issue. These impact statements would be relevant to classroom expansion reduction.

The *Caledon Enterprise*, article “RC trustees should be ‘embarrassed’: minister”, (Belgrave, 2006g) stated that Minister Pupatello sent lawyer Peter Lauwers to discuss with the Trustees to either accept the appointment of a special advisor working with the terms of reference written by the government or prepare for a supervisor to come in and take over the school board. The newspaper article said that Pupatello responded by asking Lauwers to relay her ultimatum. Mr. Lauwers is requited in the article by saying, “the minister will not hesitate to ask cabinet to appoint a supervisor and that cabinet will not hesitate.” On June 29th, the Trustees voted to accept the minister’s proposal; however, they requested changes to the terms of reference.

*Brampton Guardian* reporter Mr. Belgrave wrote an article titled, “Advisor to help clean up board’s finances” (Belgrave, 2006j), where he commented that Peter Lauwers was acting as emissary 2 weeks prior, but he came to the DPCDSB as a special advisor as requested by Minister Sandra Pupatello. The Ministry encouraged the
Trustees to develop a deficit management plan and revise financial management practices when it appointed Mr. Lauwers.

A person assisted Mr. Lauwers by the name of Pierre Filiatrault, who was originally on the investigating team appointed by the Ministry in February to examine the school board’s finances. Mr. Lauwers was to be paid $450 an hour by the Ministry of Education. The amount for Mr. Filiatrault at the time of this article was not established. In this same article, Mr. Lauwers issued an ultimatum at the July 12 Special Board Meeting where he told the school board to accept the appointment of a special advisor or who would send a supervisor in to take over local operations (Belgrave, 2006j).

In Mr. Craig MacBride’s article in the Mississauga News titled, “Catholic Board financial fix cost taxpayers” (MacBride, 2006b), Mr. Lauwers said, “I think they’re looking for me to use my knowledge. I am not a supervisor, I am not a tool of the Ministry, and I’m more of a go-between.” The article also quoted Valerie Poulin, spokesperson for Minister Pupatello, “We’re all doing this for the kids in the end. We want to give them the best programs and a balanced budget and Peter is an expert in his field.”

An editorial was issued by the Toronto Star, titled “Editorial: All school boards not created equal” (2006). The article stated that the former Progressive Conservative government imposed a funding formula in 1998 and took away the local taxing power of school boards. It was done on the assumption that all school boards were created equal. The Progressive Conservative government was wrong; there are huge differences. They brought into example such as Toronto, Durham, Peel, and York Regions, where school boards are trying to cope with a massive influx of immigrants with their language and
cultural needs. In the rural areas, school boards were trying to find economical ways of transporting students and in the north, Native School Boards were struggling to just buy books.

It was also mentioned that Minister Pupatello sent special advisors to sort out the DPCDSB budget deficit; she commissioned fact finders to deal with the Toronto District school board’s shortfall; she commissioned other fact finders to the Toronto Catholic school board; The Hamilton and Ottawa-Carleton school boards were also financially struggling. There was a telling paragraph that stated, “Clearly a one-size fits all approach cannot meet all the unique needs of each school board. That’s why the current school funding formula, which has not been changed in eight years, needs a major overhaul” (Editorial: All school boards not created equal, 2006).

The addition of $2 billion, which was injected into the system, was used to pay higher teachers’ salaries, and the government at that time claimed that it fixed the problem because a one-size-fits-all approach still existed (Editorial: All school boards not created equal, 2006).

The Ontario School Board Association called for the provincial education Ministry staff to sit down with school board officials and address the funding formula. The school board association wanted an annual review of the formula to ensure it was appropriate and adequate. This is one of the key findings in the 2002 Rozanski report (2002). It was also mentioned that Queen’s Park should also provide additional funding earlier than the end of June when issuing student grants (Editorial: All school boards not created equal, 2006).
Doug Jolliffe, President, Secondary Teachers’ Bargaining Unit, of the Ontario Secondary school Teachers’ Federation in Toronto prepared an article for the *Toronto Star* article titled “Fix education funding formula” (Jolliffe, 2006) indicating that the message is clear “fix the funding formula and let’s get on with providing a good education for students.”

*Toronto Star* article (Girard & Kalinowski, 2006), titled, “Is McGuinty the education premier?” commented that school boards across Ontario are struggling to balance their books, as required by law, despite the amount of extra funding provided by the government. McGuinty said in the article that the funding formula “remains a work in progress.” There is agreement that McGuinty did bring peace, stability, and a sense of partnership in the education system compared with the predecessor government.

The *Toronto Star* article titled “McGuinty team has big to-do list” (2006) stated that Kathleen Wynne, who became the third Education Minister in 6 months, should seize this opportunity to steer public education back on course by overhauling the flawed funding formula that was imposed in 1998. Such a move would help restore the reputation of Ontario’s public schools as some of the finest in the world.

The *Mississauga News* article, “Do what’s best for students, minister urges the school board” (MacBride, 2006c) wrote that the Minister of Education, Kathleen Wynne, addressed the DPCDSB on September 26, 2006. It was reported that she said, “I urge you to consider what’s best for your students, I urge you to work with us, and I urge you to keep control of your school board.” The article confirmed that the Minister acknowledged some of the complaints of Trustees about underfunding. She was quoted
in the article, “there is more to do, but we have made fundamental changes in the funding
formula, it’s an ongoing process.”

The article continued that Peter Lauwers dangled an incentive in front of the
Trustees by making amendments to the cost-cutting plan. However, the amendments had
no impact on the Trustees as they refused to send the proposal to its finance committee
for consideration. Mr. Lauwers explained in the article that the next expected step is for
the new Minister to simply tell the school board what to do by issuing a letter of direction
“Do what’s best for students, minister urges the school board” (MacBride, 2006c).

A news release was issued by the Ministry of Education, Queen’s Park (Ministry
of Education, 2006b). The first paragraph commented that in fact the Minister of
Education, Kathleen Wynne, announced that she has issued a direction to the DPCDSB to
implement a modified 2-year deficit management plan to reach a financial balance, as
required by law, by the end of the 2007-08 school year. The press release stated that the
Minister has directed the DPCDSB Director of Education to file a balanced final budget
implementing the first year of the plan by October 6th, 2006.

Louise Brown, education reporter at the Toronto Star, in an article titled, “School
board gets final order to balance books” (Brown, 2006b), mentioned that Minister
Kathleen Wynne sent a letter to DPCDSB directing to make cuts recommended recently
by the provincially appointed advisor to reading programs, busing and staff. She
mentioned that if the school board defies the order to balance the budget at its next
meeting, the province would have legal right to send in an outsider to take over the
financial reigns of the school board and balance the books. This was something that the
Mike Harris government did to three school boards including the Toronto District school board, where Kathleen Wynne was a Trustee. She voted against the cuts at that time.

The press releases for October 2006 were the month prior to the Trustee election in November 2006. It is interesting to note that of the Trustees that stood for reelection, all but one were returned to the school board.

The *Toronto Star* article titled “Cuts made to pay teachers, union says” (2006) stated that the unions representing public high school teachers said that the province has to put in $511 million to pay for teachers’ salary increases or there will be cuts in the classroom. Rhonda Kimberly-Young, President of Ontario Secondary school Teachers’ Federation, said school boards are struggling to pay clerical staff, initiate reading programs and run busing services because the government cut education grants to pay for $600 million increase in teachers’ salaries.

Moira MacDonald’s article in the *Toronto Sun* titled “Labour peace at a cost” (MacDonald, 2006) stated that even Liberals now have no option left to deal with DPCDSB. This is after months of meeting Trustees and staff, government-appointed investigators sent in last spring, then a special advisor appointed in the summer, and a new deadline of September 22, 2006 to submit a balanced budget (missed), and finally a personal direct appeal last week from the latest Education Minister, Kathleen Wynne. There are only two steps left. They are (a) issue a letter of direction telling DPCDSB to balance its budget as the province did Friday and (b) appoint a supervisor if the board does not comply.

The article “Labour peace, at a cost” (MacDonald, 2006), in a section titled, “Triggered Alarm”, stated “DPCDSB has triggered the alarm first, exhausting and
frustrating every stopgap measure, the Liberals have to avoid doing exactly what they criticized their predecessors of doing.” The Chair of the school board said that people filled out about 33,000 cards asking the government to properly fund the school board. The areas of transportation, special education, and teachers’ salaries are the three big problem areas.

The *Toronto Star* article “No new money, province warns school boards” (2006) commented that a report by the Canadian Centre of Policy Alternatives (CCPA) called on the province to inject at least $660 million into the schools to reflect current costs. Eighteen of the 72 Ontario school boards are getting less funding now than they were in 1997, the report found.

The month of October was becoming very tense with the media releases and article by the *Toronto Star* (Urquhart, 2006b) titled “Time to fish or cut bait on school boards.” In the article, it was stated that the current dispute between DPCDSB and the government is symptomatic of a wider and chronic problem.

The school boards responded that much of the new money ($2.75 billion) poured into education has been ticketed for pet Liberal projects (such as reduction of class sizes in elementary schools) and that basic funding remains below what is required to do the job.

On October 3rd, Wynne ruled out additional funding. Mr. Urquhart (2006b) continued saying that with provincial election just one year away, the temptation may be irresistible to the Liberals to chip in, say, another $100 million to balance the school boards’ budgets.
A long-term fix is needed for what has been a dysfunctional system since 1998. This was the year the previous Progressive Conservative government under Mike Harris removed taxing power from school boards. It was then that money for schools would be raised by the province and redistributed to the school boards with tight strings attached. An interesting comment was made that the school boards become mere facades. All the important decisions regarding publicly funded schools are now being made at Queen’s Park, either by the Ministry of Education or by the Ministry of Finance (Urquhart, 2006b).

Urquhart (2006b) referred to David Crombie, who headed at one time the Progressive Conservative government’s “Who does what panel.” Mr. Crombie recommended that the school boards be allowed to retain a small amount of tax room–up to 5% of their budgets to raise money to address local needs. Mr. Urquhart summarized the entire document by saying, “thus we have the worse of both worlds in education today: a highly centralized system with a decentralized façade. Into the latter flows a substantial amount of the province’s political energy, never to be seen again.” He closed by saying that it is time to acknowledge that the system is unworkable, and either abolish the school boards or give them back some taxing power.

The hardest hitting article in October was published by the Toronto Star titled, “Reform school funding: Christie” (Brown, 2006a). The article opened about Mr. Paul Christie, sent from Queen’s Park to balance the defiant TDSB budget. The showdown between the province and the Catholic Trustees in Peel is history repeating itself–no matter who is in power. It was reported that it would keep happening–possibly even again in Toronto this fall–until the province fixes its school funding formula. The article
said that in fact “this is a kinder, gentler supervision – this government even uses similar
terms like ‘special assistance team’ instead of ‘investigator’, but at the end of the day
they have to balance the budgets said Christie.” Mr. Christie was ordered by the
government to cut $89 million from the Toronto District school board’s budget in 2002.
Ms. Wynne stated in the same article, “we’re a very different government than the Ernie
Eves government. We put billions into education, we’ve lowered class sizes, and we’ve
made situations in classes much better for students.”

The Trustees are dealing with difficult situations and who are prepared to work
with them. In the same article, “we will continue to work, look at how to improve the
quality of funding formula, but I completely reject the notion that the only thing that
public education is somehow a shortage of money”, McGuinty said (Brown, 2006).

There was an article in the Toronto Star, “Tory no threat, education minister says”
(2006) where it was announced that Kathleen Wynne would be challenged by Progressive
Conservative leader, John Tory, in the election in October 2007. Kathleen Wynne was
quoted as saying in this article, “I’m only worried about the backlash or unhappiness if
we’re not doing the right thing.” She was also quoted, “I think we have been doing the
right thing and we’re going to continue doing the right thing … I’ll go to the polls on the
strength of that and I think we’re in a very good position.”

The month of October 2006 continued with some headlines regarding the issue of
underfunding. The Globe and Mail article written by Margaret Wente (October 5, 2006)
titled, “Just call him Dalton McHarris” commented that in fact Dalton McGuinty never
did address the main problem in education, the hated funding formula. It makes the
school boards accountable for costs that they cannot control. Queen’s Park Bureau Chief
for the Canoe Network commented that defiant parents for the GTA Catholic school board said they would not allow their Trustees to be bullied by the Ontario government and into making unwanted cuts. Mrs. Hobin, Chairman of the Central Committee of Catholic School Councils (CCCSC), said that implementing the deficit management plan would result in cuts of millions of dollars in programs and service to students (Artuso, 2006). Mr. Peter Ferreira, school board Chairman, said he believed the province has picked on DPCDSB to send a message to larger school boards in Ontario that failed to balance their books (Artuso, 2006).

In an article of the Mississauga News (MacBride, 2006a) titled “Board makes last stand in battle with Province” the school board was obviously prepared to lose control when a comment was made by the reporter when he said, “if a supervisor is appointed by the Minister, Trustees will not gain control until one year after the Supervisor files a balanced budget with the Ministry.” He continued by saying, “that means the Trustees elected in November (2006) may not be allowed to deal with the financial matters until more than two years into their four year term.” On a sidebar note, it was obvious that the Trustees were prepared to take a calculated chance based on their position of not balancing a budget.

The Brampton Guardian wrote an article titled “School board faces deadline today” (Belgrave, 2006h), where Sharon Hobin Chair (CCCSC) said parents recognize and appreciate the value of local representation and are appalled with the notion that the Minister of Education and the education government would even consider sending their supervisor. Mr. Ferreira, the Chair, in the same article was quoted, “while Trustees rejected millions in spending cuts, they believe the cuts would harm students, programs
and staff. They have approved portions of the deficit management plan and reduced the projected 2006-07 budget shortfall to $7.5 million from $16.6 million.” In the closing paragraph it was stated, “we are not trying to shirk our responsibility, but I have said many times we will not balance the books on the backs of our children.”

Kerry Gillespie’s article (2006) titled, “Clock ticks down for board,” reported Dalton McGuinty saying, “so that we have the benefit of some facts before us, we have increased funding for that particular school board by $128 million over three years, that’s a 22% increase. I think that’s pretty significant. That means we’ve increased funding per pupil by $1,300.”

On October 10th, 2006, The Toronto Star (Board gets supervisor) reported that the school board gets its supervisor. Mr. Norbert Hartmann, was appointed by Kathleen Wynne. She described him as the Chair of a Co-Management Team and not a supervisor. He could be at the school board for 2 years while the cuts are carried out. He has authority to approve all financial decisions.

Ms. Wynne (Board gets supervisor, 2006) commented that Mr. Hartmann would be working with two advisory Trustees to keep the school board’s books balanced. This is about doing the right thing for school boards in the province. This is about doing the right thing for the students in the province and making sure we have the school boards in place for functioning at the highest level possible.

Sandra Sahli of the Ontario Secondary school Teacher’s Federation commented, “if something doesn’t change, we’re going to have a bigger crisis in the spring of 2007.” Sahli commented that many school boards, in northern Ontario in particular, would be
able to balance their books this year only by cutting support staff and dipping into the reserves (Board gets supervisor, 2006).

The school boards and educators across Ontario warned that the Ontario Liberals have to fix the education funding formula or face deep cuts in the illegal deficits in many more Ontario school boards next year (Board gets supervisor, 2006).

Mr. Johnson, President of the Ontario Public school boards’ Association, said many school boards across Ontario have watched to see what happens to DPCDSB because they expect to be in a similar position next year. His closing comment was, “everybody’s paying attention to it” (Board gets supervisor, 2006).

Kerry Gillespie and Tess Kalinowski’s article titled “$1,500 a day for school cost cutter” (2006) stated, “the man given the task of cutting millions of dollars in programs and staff at the Ontario school board will be paid $1,500 a day to do it.” Peter Ferreira, Chair of the DPCDSB said, “there is money to pay him, but there is no money for DPCDSB? I am stunned. That is unacceptable. That’s a lot of money that feeds a few families.” Mr. Lauwers was paid $450 per hour to eliminate DPCDSB deficit. He said there is no set term for Mr. Hartmann’s appointment, so it is unclear how much the government will actually have to spend.

A very strongly worded editorial appeared in the Toronto Star titled, “Schools need cash not budget cuts” (2006). The article suggested, “to balance the budget at the DPCDSB is the latest symptom of a larger, long-term problem plaguing the province’s schools.”
“The major problem facing the school board is not the Trustees, although it could be argued that some school boards might be able to slash programs and staff more aggressively than they have done in the past” (Schools need cash not budget cuts, 2006).

A much bigger issue, though, is Queen’s Park’s school funding formula, which the former Tory government admitted wasn’t working and which Premier Dalton McGuinty has promised to reform, but has not done so” (Schools need cash not budget cuts, 2006). The article continued, saying “Financial Problems affect many of the province’s 72 school boards, including some of its largest. Some school boards that managed to stay in the black this fall reportedly did so by dipping into reserves, staving off inevitable financial difficulties only until next year” (Schools need cash not budget cuts, 2006).

A very interesting comment was made in the editorial, saying “McGuinty should finally make good on his pledge to fix the funding formula and put the education system back on a solid footing once and for all. The school funding formula, introduced by the Tories in 1998, has long been criticized for its one-size fits all approach that fails to take into account the different needs of the province’s school boards” (Schools need cash not budget cuts” 2006). The editorial did admit that in fact McGuinty had pumped an extra $2.7 billion into the education system in 2003, but much of it was earmarked for special initiatives such as reducing class sizes in early grades, which has failed to address the fundamental shortcoming in how schools are funded.

The last two paragraphs stated, “If McGuinty wants to find out what is the root cause of the financial squeeze facing schools, he should listen to Christie, the man appointed in 2002 to chop $89 million from the Toronto public school board’s budget.
Christie told the Star last week that until the government school funding formula is fixed, ‘this problem is not going to go away’” (Schools need cash not budget cuts 2006).

An article titled “Peel axe man faces tough road ahead” (Kalinowski, 2006) said that instead of sending in an antagonistic team like the Progressive Conservative government did when it appointed supervisor Paul Christie to the Toronto District school board 4 years ago, Hartmann is the latest “friendly” education insider to be dispatched to the battlefront.

Veronica Lacey, President of the non profit group, The Learning Partnership said that Mr. Hartmann is a straight talker. She continues to saying that he is not a games player. He cares about kids, he cares about teachers, and he cares about the public confidence in publicly funded education (Kalinowski, 2006).

In an issue that is aside from this public issue of budget deficit, there was an article on GST rebates. These rebates would provide additional funds for products used in schools to teach students. An article was written in the Brampton paper (No GST rebate increase, 2006) where Federal Finance Minister, Jim Flaherty, told Trustees there were no plans to increase Goods & Services Tax rebates to school boards. The government increased municipal GST rebates to 100% from 57.14% in February 2004. It was noted that Peel District school board Chair, Janet McDougald, wrote Flaherty asking for a full reimbursement of the taxes. The Peel school board gets a 68% rebate on all its goods and services purchases. Janet McDougald pointed out that school boards are paying GST on a wide range of items that municipalities do not, such as fuel for school buses and sports program equipment. Mr. Flaherty wrote a letter back to Janet
McDougald where he said similar increases in the GST rebate for school authorities was not contemplated at that time.

Issues continued to percolate when it was written by Roger Belgrave from the Brampton newspaper that Canadian Union of Public Employees (CUPE) warns of unrest if new appointee involved in its negotiations (Belgrave, 2006e). There was a news release from CUPE that said, “We bargain with the school board. That’s our employer. We want assurances from the Premier and the Education Minister, in particular, we will not be subjected to the Ontario government axe man at the bargaining table”, Contracts between the DPCDSB and CUPE Locals 1483 and 2026 expired at the end of September, and negotiations were scheduled to begin in November 2006. The issue came to a head when it was noted that the deficit reduction plan Hartmann was chosen to implement at the school board included cuts to custodial and secretarial staffing.

This was the first time in an article that Mr. Hartmann was named as Chair of the Co-Management Team, which would lead two volunteer Trustees to act as advisors. Trustees showed little interest in participating in the process Hartmann was selected to carry out (Belgrave, 2006e).

The November 2006 municipal election was around the corner when an article titled “Minister will look for trustees to cut budget after the election” (Belgrave, 2006f) reported that the Education Minister was willing to wait until after next month’s municipal election to see if any Catholic school Trustees were willing to serve as an advisor. It made mention that in fact no Trustees had jumped at the opportunity to join the team.
Minister Wynne suggested some of the newly elected Trustees might be more willing to take an active role in implementing the cost reduction strategy. The strategy was a 2-year scheme to erase what was projected to be a $16.6 million budget deficit for 2006-2007. It would include cuts to secretarial staff, custodians, teachers, helping students with reading difficulties, busing for some students, and the implementation of a full-day kindergarten. Wynne said she was not prepared to force Trustees to sit on a Co-Management Team.

In the days leading up to the November 2006 municipal election, Roger Belgrave of the Brampton Guardian wrote an article titled, “CUPE Launching Campaign Against Government” (Belgrave, 2006d). He commented that custodians and secretaries at the Catholic school board were among the members of the Canadian Union of Public Employees (CUPE) who voted to launch a public campaign calling for changes to Ontario’s education funding formula. Minister Wynne said Norbert Hartmann would not interfere with an existing collective agreement or sit at the bargaining table. However, he would have the final word on all financial decisions at the school board and would be required to approve financial components of negotiated contracts.

In the election campaign of November 2006 all but one Trustee that stood for reelection would return to the DPCDSB. For the balance of November and for the month of December, it was a quiet time on the media side.

The Toronto Sun article titled, “Wynne and You’re In” (MacDonald, 2007) stated that Minister Wynne had a sit-down interview in the Minister’s office just prior to Christmas. She responded to MacDonald’s questions by summarizing, “my job is to make sure we keep our education agenda on track.” She added that she intends to be re-
elected as MPP. She said, “I’m not going to be distracted by that kind of analysis.” She was referring to the fact that John Tory would be running against her in the upcoming election. Minister Wynne acknowledged it was going to be a very political year. “Our challenge is to keep our eye on the ball which is improving student achievement, working towards the target of keeping more students in school and also continuing to reduce [primary elementary] class size.

Improvement to the oft-discussed education “funding model” are a theme too, but school boards that complain that while the government has dumped big money into pet projects, like smaller classes, funding for more mundane, ongoing costs such as busing and heating has increasingly fallen behind and the school boards will probably be disappointed. Minister Wynne asked for input from the school boards, and the Ministry will advise the school boards by March about their funding level for next year. “We have funding constraints, and our priorities will remain our priorities.” Minister Wynne’s closing statement in the article read, “I don’t believe there is such a thing as an irresolvable problem. If you stay at it and bring the right people to the table and you’re willing to tap into people’s creativity, imagination and goodwill… [and] if you help people set their fears aside, you can get a lot of work done.”

There appears to be a difference from the time that the initial Minister had approached the school board to this particular Minister’s perspective.

An article written in National Post (Matthews, 2007) titled, “Dufferin-Peel Catholic District school board stripped of decision-making powers” reported that the province had stripped Trustees of their financial powers after they rejected an invitation to take part in the cuts. Mr. Norbert Hartmann was quoted as saying, “I am extremely
disappointed that the Trustees chose to reject an offer to restore financial decision-making power to the school board.” Mr. Hartmann made this statement on February 5th, 2007. Mr. Hartmann said staff will now report directly to Mr. Hartmann, and Trustees will not be involved in making financial and operating decisions for the school board.

Another article written in the Mississauga News titled “Takeover was only option: Premier (2007) comments, “Premier Dalton McGuinty and Education Minister Kathleen Wynne both said yesterday the province had no choice but to take control of the DPCDSB. The Trustees passed a resolution saying they would not work with Hartmann to eliminate the $15 million deficit.” Mr. Hartmann had worked with the school board since October to balance the school board’s budget. Minister Kathleen Wynne said on February 6, “It’s really the Trustees who have removed themselves. I would rather Trustees take charge of their school board, but we are financially responsible for the tax dollars that are running that school board.” At this time, the school board had 141 schools in Brampton, Mississauga, Caledon, and Orangeville, educating close to 89,000 students. The Ontario opposition took full advantage of this situation where the leaders accused the government of failing to make good on its election promises to change the way schools are funded. In fact, NDP leader, Howard Hampton said in an open letter to Catholic Trustees, “You have refused to do the dirty work of a government that has broken its promise to students” (Takeover was only option: Premier, 2007).

Mr. Hartmann said there would be no cuts beyond the $11 million already trimmed this year, and there will be more reductions in the next 2 years. This would include busing to French Immersion and other optional regional programs including the
school board’s only all-girls high school that is not currently accessible by public transportation (Takeover was only option: Premier, 2007).

The other cuts would involve eliminating 19 secretaries and caretakers and adjusting the special education students to board wide teacher ratio from 200:1 to 204:1 and revising the high school staffing formula to eliminate 30 teaching positions. Within the article, it states that Kathleen Wynne and Mr. Hartmann said that cuts will not affect students, but Larry Stevenson, Head of the Caretakers Union, said that has already happened. The school board has lost 37 caretakers, mostly due to retirements, who have not been replaced in the last year (Takeover was only option: Premier, 2007).

The *Toronto Sun* article titled, “School budget hypoGrits” (Blizzard, 2007) said that in fact “the province has appointed a supervisor…oops an overseer…to get the school board back in the black.” She mentions, “Where have I heard all this before?” It was back when the Ernie Eves Progressive Conservatives installed Paul Christie, and the Liberals publicly chastised the move to supervision on a daily basis for attempting to get the Toronto District school board’s $100 million deficit under control in 2002. Christina Blizzard mentioned that during the last election the Liberals had promised to fix the funding formula and “restore democracy” to school boards. When McGuinty was asked, he said “we have put more money into public education in our three years and a little bit than the Tories did in eight years. When was the last time you heard about a strike? When was the last time that children could not go to school because of labour unrest?”

Mr. Murray Campbell of the *Globe and Mail* in an article titled, “School Board Squabble Threatens to Tarnish Government’s Image” (Campbell, 2007) said that Mr. McGuinty has succeeded in creating labour peace and has had smoother relations with
school boards despite differences over the financing of their operations. However, the move this week to strip defiant Trustees at DPCDSB of most of their powers harkens back to the Progressive Conservative years when provincial supervisors were imposed on school boards that refused to balance their budgets. He stated, “the showdown with DPCDSB has been a car crash in slow motion. The school board has been sparring with the government for about 15 months about its $660 million budget.” The government ordered the school board to slash its deficit, which was pegged at $16 million.

Minister Wynne pointedly refused to call him a supervisor, a term the Progressive Conservatives used for Mr. Paul Christie. Instead, Ms. Wynne said the term “co-manager” was used and would lead a co-operative effort to balance the budget. It was again said, “The school board has again rejected the politics of faith, hope and respect” accusing Trustees of engaging in a “power struggle, pure and simple” with the government.

The article by Mr. Campbell (2007) mentioned that there are already indications that the government is not getting credit for its accomplishments in education (and health care). In fact, Angus Reid Strategies found that just 36% of respondents agreed that the government had made significant improvements to the school system. Worse, just 15% thought the Liberals had performed better than the Progressive Conservative on this issue. It was reported that the results could indicate either that the Liberals have communicated poorly or that voters are resistant to their boasts about labour peace, test scores, and lower class sizes. They had better hope that it is the former and that they can find the language that voters and rebellious school boards can understand.
The foregoing literature review spanned a period of about 3 years. It was the intention of the author to show in fact that the situation gathered enough steam to cause concern for the Ministry in referring the DPCDSB budget deficit from its initial mismanagement of funds to a public acknowledgement by the Ministry of Education that it is an adjustment in the funding formula that is required.

The articles conclude on February 7, 2007, the date that the announcement was made in the media of the school board’s takeover by the Chair of the Co-Management Team.

The following articles will shed some light from the school board’s perspective relative to the media reports.

In the proceeding pages, there will be an outline of school board focussed media releases. They will also be broken down into three categories as mentioned previously, which are Post election period, mid-term period and end-term period.

*Post-Election Period–School Board Perspective*

Roger Belgrave, staff writer at the Brampton newspaper, wrote an article titled, “School board wants to be more accountable” (Belgrave, 2004b) and reported that DPCDSB Trustees recently approved the formation of an audit committee that will review school board finances, accounting, and operations. The formation was still in its early stages, and terms of reference must still be written. Mississauga Trustee Mario Pascucci had been selected chair of the committee. Fellow Trustees selected him during the school board’s recent annual organizational meeting. Mr. Peters (Chair of the DPCDSB) said plans are to have members of the public on the committee in about a year. The school board will canvass the community for potential candidates. The DPCDSB
staff reports that ideally audit committees should be made up solely of members outside the organization and be financially literate.

The primary reason is to ensure an independent and financial perspective on reports and recommendations made to the committee. Mr. Peters continued to say that the school board is a public sector organization with elected custodians and Trustees would remain on the committee as representatives of their constituents.

In another article titled, “Board becoming accountable,” Belgrave (2004a) wrote the public is looking for greater accountability from politicians and government. The Catholic school board continues taking steps towards making its operations more transparent to its local supporters. At the end of the article, he wrote that in fact, with scandal and scrutiny grabbing media attention at all levels of government and publicly funded institutions, taxpayers are understandably wary of the goings-on at various organizations. Even the provincial government has made legislative changes to broaden the range of public sector institutions that fall under the microscope of Ontario’s Auditor General.

Bill 18, The Audit Statute Law Amendment Act, was passed at the end of November by the provincial government. This legislation allows Queen’s Park to conduct “value for money audits” of public sector institutions such as universities, colleges, hospitals, and school boards. It concluded saying that Catholic school board officials deserve credit for taking steps on their own, “Board becoming accountable” (Belgrave, 2004a).

There are still many publicly funded institutions in this region asking us to trust they are doing what is best for taxpayers without allowing taxpayers to judge for
themselves. True transparency is not possible until independent and unbiased members of the public are sitting on the local audit committee.

In the *Caledon Midweek Enterprise* (Belgrave, 2005d) article by Roger Belgrave, titled “Catholic school board more accountable”, he opened the article by saying local residents will be allowed to sit on a new committee designed to look at the Catholic school board’s financial and accounting practices. Mr. Peters, the school board Chair, was quoted in this article, “It’s the whole idea of being accountable to the public with public dollars.”

Roger Belgrave wrote an article in the *Brampton Guardian* titled “Catholic school board beginning to charge rent for school use” (Belgrave, 2005b). The article quoted Mr. Melito, Superintendent of Plant at DPCDSB, as saying, “In the past, the school board has been providing permits and absorbing lots of the costs.” He said that in fact administrative costs, custodian salaries, utility charges, and wear and tear on school buildings and equipment are all expenses incurred when the school board rents out its property. These expenses have been costing the school board an estimated $300,000 to $400,000 a year. According to an administrative staff report, the school board currently receives about $40,000 to $50,000 annually in permit fees. They expect the new pricing schedule will generate about $540,000 annually in fee revenues. Mr. Melito was quoted that in fact applicants now apply to the centralized permit office as opposed to the individual school.

In the *School Advocate Newsletter*, Volume 1, Issue 1, there was an article written titled, “Back to school 2005-2006” (Hobin, 2005). The article was written by the Chair of the Central Committee of Catholic School Councils in DPCDSB, Ms. Sharon M.
Hobin. This letter was directed to Education Minister Kennedy at that time. The article addressed the serious matter affecting children in DPCDSB. “We hope in your capacity as Minister of Education we can rely on your understanding and clear thinking in terms of funding for school boards, specifically DPCDSB. Over many years, DPCDSB has striven to deliver balanced budgets to the Province. As a result, this has had a detrimental effect to on our children and the system.”

A paragraph stated that in 2004, DPCDSB provided our local members of the legislature a copy of our financial situation. “Very little has changed to address our structural deficit. We continue to have to deal with the differential between what our school board pays in salaries and benefits (the actual costs) and the provincial benchmarks. This differential has contributed to our estimated 2004-05 net operating deficit of $10.5 million” (Hobin, 2005).

The letter continued by saying, “we are currently spending $4.2 million more to address the needs of students who need special education services than the Ministry provides in revenue. In addition, you have clawed back $4.1 million from Special Education instead of applauding our school boards good management plan. Are you listening to our concerns?” (Hobin, 2005).

“We have also been writing to you about our transportation shortfall of $2.9 million. Our school board has been penalized for providing an efficient transportation model with our co-terminus school board since the introduction of the new funding model in 1998” (Hobin, 2005). At the end of the letter she wrote, “we believe the solution to our financial crisis is to ensure that we are funded based on actual costs. One time funding announcements and specialty grants do not help with out continuing
financial crisis. Timing of the funding is crucial to our budget. We must reiterate that all our reserves are gone. DPCDSB is willing to work with you, our Minister of Education, and our local Members of the Legislature to solve our funding problems. We expect that you will not only listen, but also act. We are not asking for the moon. We are asking for the funding we deserve for our children” (Hobin, 2005).

The article written in the *Brampton Guardian* titled “Catholic School Board Ignores Looming Budget Deadline” (Belgrave, 2005c) stated that Arthur Peters, Chair, said the Minister has to help the school board to rectify a chronic funding shortfall. The DPCDSB is forecasting terrible financial weather ahead and insists only the provincial government has the means to improve next year’s budget outlook. The figures in the article said that the school board estimated the funding shortfall in transportation at about $3 million. The salary funding gap for next year is projected at $8,655 for each of the school board’s more than 3,000 elementary school teachers and $7,499 for each of its approximately 2,000 high school teachers.

The article noted that the Ministry staff told Arthur Peters that they were trying to schedule a meeting with Education Minister, Gerard Kennedy, who last contacted him on July 11 (Belgrave, 2005c).

Mr. Arthur Peters, Chair of the DPCDSB wrote an article in the *Brampton Guardian* (November 9, 2005) titled “Lack of funding is a huge problem.”

The opening paragraph stated, in September, the school board filed a balanced budget estimate with the province. In reality, a projected $17 million shortfall remains. This must be addressed when we file a revised budget in December. Chronic underfunding is the primary culprit. For the past 3 years, the school board has used funds
from a reserve account to cover operating deficits. These deficits are an overwhelming result of funding levels being nowhere near the actual experiences we incur to realistically pay for items in three key areas. He continued by saying the areas of concern are: special education, student transportation, and salaries and benefits for staff. Using teachers as an example, the difference in salary funding and what teachers are actually paid is approximately $7,000. With over 5,000 teachers employed by DPCDSB, you can see how this becomes a major issue (Peters, 2005).

These three key areas must be properly funded in order to address our structural deficit. Our staff has met with Ministry representatives during the past months to discuss these areas. While we continue to receive no indication of new funding, we have been assured there is at least an understanding of some of the issues we face (Peters, 2005).

DPCDSB Trustees remain committed to preserving programs at the school level and maintaining a “children first” approach to decision making at the school board table (Peters, 2005).

In the Brampton Guardian, Roger Belgrave wrote an article titled, “Catholic board asking parents to pressure government” (Belgrave, 2005a). The opening statement in the article was, “What Catholic school board officials are calling government funding deficiencies, Ontario’s education Ministry is labelling poor school board management.” An announcement was made in the article that Catholic school board Trustees the turning to parents and the public for help in pressuring the provincial government for more money. The DPCDSB Trustees have launched a public information and lobbying campaign aimed at loosening the purse strings at Ontario’s Ministry of Education. The article quoted Ministry personnel as saying that this is not a funding issue, but a
management issue. The Ministry continued, the government has fixed most of the educational funding problems, and all school boards should be able to balance their budgets as well as improve the education students are offered.

The DPCDSB had a campaign to print about 100,000 cards. The campaign cost the school board approximately $5,000 to $6,000. The school board chair, Mr. Arthur Peters, said that he had been trying unsuccessfully to contact and meet with the Education Minister, Gerard Kennedy, for the last 5 months. Two days after Trustees gave administrative staff approval to proceed with the public campaign, Kennedy telephoned Peters. Mr. Peters then said, it was safe to say that we have gotten the attention of the Ministry (Belgrave 2005a).

The DPCDSB issued a press release (Dufferin-Peel Catholic District School Board, 2006b). The school board was quoted, “standing on the strength of their year-long stance and overwhelming support from the community, Trustees directed staff to not comply with an order from Ministry of Education, Kathleen Wynne to implement a Deficit Management Plan created by staff and Ministry Advisor Peter Lauwers, a plan the Trustees had already rejected on September 14 and refused to reconsider on September 26” (DPCDSB, 2006b).

Trustees did approve approximately $10 million in economies. This is in addition to economies of approximately $13 million achieved from December 2005 to August 2006. The economies approved on September 14 reduced the school board’s projected 2006-07 operating deficit to approximately $7.5 million (DPCDSB, 2006a).

Mr. Peter Ferreira was quoted, “we have done our part and taken a tremendous chunk out of the system already. Without an increase in benchmark funding to address
the chronically deficient funding formula, we will be right back in a deep hole again next year. Our community has said enough is enough and we have heard them. We will not do it. We won’t swing the minister’s axe to fix a problem they promised to fix when they were elected” (DPCDSB, 2006a).

The press release concluded, the Minister of Education is now in a position to seek approval from Cabinet to appoint a supervisor to take over control of the school board (DPCDSB, 2006a).

In an article titled, “Catholic board continues to defy minister” written in the Brampton Guardian (Belgrave, 2006b), Roger Belgrave reported that in a 7-2 vote, DPCDSB once again disregarded the urging by the Minister of Education, Kathleen Wynne, and a special advisor by instructing administrative staff to defy a provincial government directive. Mr. Lauwers was quoted as saying, “instructing staff to disobey the directive removes power from the locally elected school board and the provincial government still proceeds with the cost-cutting measures. Defiance now would not stop implementation of the plan. It is over. You’ve reached the end of the road.” The vote by the DPCDSB was a 7-2 vote where Trustees opposed the school board’s decision to defy the directive outright. Vice Chair of the school board, Anna Abbruscato, said, “tonight I refuse to be bullied by a soft spoken Minister of Education.” Mr. Adamson, former chair of the DPCDSB, tried to convince the school board members not to break the law by defying a legislative directive. “We are defying the rule of law and I’m very concerned about that.”
Trustee Zanella feared a supervisor would make deeper cuts to staff and services than originally planned. “What I am afraid of is that when a supervisor comes in the situation will be made worse” (Belgrave, 2006b).

Mr. Lauwers said to Trustees that a supervisor could control the school board for 2½ to 3½ years (Belgrave, 2006b).

In the files from the Tor-Star Network (Wilkinson, 2006), there is an article written by Robyn Wilkinson titled, “‘We won’t swing ministry’s axe,’ vow Trustees.” Mr. Wilkinson wrote, Mr. Peter Ferreira said, “we don’t want a supervisor just as Minister Wynne didn’t want one when she was in our position.” The article continues saying, with the provincial government facing an election in one year, Trustees appeared to doubt the possibility of a takeover.

Caledon Trustee, Frank Di Cosola, said that this government is facing an election soon and knows our community will not watch while our school board is slashed and burned by a supervisor. Di Cosala continued, “if there is a supervisor sent in, if the minister has the courage, we will work with them, but we are not going to cut programmes ourselves that we are committed to protect” (Wilkinson, 2006).

In the Brampton Guardian (2006), an article was written titled, “School board standoff is all about politics”; it stated that both Dalton McGuinty’s Liberal government and the Trustees at the DPCDSB have insisted that during this standoff over funding and financial management their actions have nothing to do with politics. Both Queen’s Park and school board members said they are acting with the best interest of students at heart. However, politics is an unavoidable constant in the Ontario public school system equation. The article continues, saying the standoff should have come to a head earlier
this week. This is when Trustees in fact instructed administrative staff to defy ministerial
directive. The article summarized what is politics and it stated the following. This is
from the Trustees perspective: When Trustees spend hours telling a room filled with
hundreds of employees, parents, and media about how the school board has been
shortchanged by the provincial government—that is politics. When the school board
launches a public campaign telling the Premier, “Don’t hurt our schools” and deliver
petitions to Queen’s Park in front of a camera—that is politics. When school board chair,
Peter Ferreira, and parents held a news conference at Queen’s Park to restate their case to
the public—that is politics. This is from the government’s perspective. When the
government issues news release after news release about funding allocations—that is
politics. When McGuinty visits Peel to sit in a primary grade classroom with students
and announce progress of the class size reduction initiative to media—that is politics.
When education ministers respond to Ontario school boards complaining about
underfunding by stating: The Liberals have put more money in the system, while the
previous Progressive Conservative government cut funding—that is politics.
The summary comment was said, the public school system operates in an undeniably
political environment run by elected officials dependent on taxpayer dollars. It should
not be naïve to deny the political nature of Ontario’s public school education system.
None of the Trustees headed to the polls next month or the Liberals headed an election in
a year strike me as naïve. I certainly would not vote for a naïve politician; after all,
politics is about governance and acting in the best interest of one’s self or others (School
Board Standoff, 2006).
The following figures 1 & 2 represent the samples of postcards in the “Mr. Premier, Help Us? Don’t Hurt Our Schools” postcard campaign delivered to the Premier’s Office.

Figure 1 – Elementary school postcard
The Dufferin-Peel Catholic District School Board is facing a $17.1 million debt this year as a result of underfunding by the provincial government in three key areas: Special Education, Student Transportation, and Salaries and Benefits.

Underfunding hurts students and their prospects for success.

Please show your concern for proper education funding by signing this postcard and returning it to your child’s school.

Signature

Print name ___________________________ Date ____________

Address ___________________________

Dufferin-Peel Catholic District School Board

Figure 2 – Secondary school postcard
CHAPTER THREE: METHODOLOGY

In this chapter, the data collection techniques are described. The methodology used the qualitative, chronological, and analytical data collection technique. The tables used for the statistics were from numerous school board and committee discussion papers and public documents submitted to various entities.

Interview Process

The objective of interviewing individuals was to obtain data from information-rich individuals. It was not the intention to interview hundreds of individuals when in fact the key stakeholders with a minimum of 8 years experience would provide a very rich response to the interviewer’s questions. The interviewer contacted 14 individuals as a sample of convenience from various backgrounds. These individuals included 4 teachers, 4 senior administration both at the school board level and ministry, 3 parents/guardians, and 3 taxpayers, without children, that support the Catholic School Board.

The interviewer used the literature review to qualify support and confirm the responses of the interviewees. In many cases, the literature review would go back at least 3+ years to 2002. It is interesting to note that the experience of some of the respondents went further back to at least 1997.

Qualitative research technique was used because my personal political world lends itself to this type of data collection. I used my 24-year background as a Trustee to balance the questions for the interviewees. I also used the experience to affirm the responses from the interviewees to ensure that the information came from a timely perspective. The qualitative data collection involved interviews with key stakeholders.
and content analysis from various media, including newspaper articles, magazines, clipping services, libraries, obtained through public relations departments, education focused organizations, school board and committee documents, and published public reports (Ministry and otherwise).

The interviewer used the case study method for qualitative research with the intention to describe, explain, and evaluate specific educational funding issues and their impact on the school board and the education setting within the province of Ontario.

The quantitative aspect of the study involved researching and examining relevant articles from various database reports and communications from the Ministry of Education, school board committees, and school board. The embedded tables, figures, and charts reflect the data with relevant information. In many cases, these data were provided to the Ministry of Education to provide a foundation for the school board’s claim of an underfunding formula that did not reflect the true cost of education. There was also information that was provided to Members of Provincial Parliament (MMPs) within the DPCDSB jurisdiction.

The interview process was used because of its adaptability. It offered the interviewer the opportunity to ask structured and unstructured questions. When the information was either incomplete or raised additional issues, a follow-up question would be used to confirm the response. Another advantage of our interviews is that they provided data in much greater depth than a questionnaire for data collection.

It was the intention of the interviewer to produce a true position of the respondent’s opinions and feelings. The major potential disadvantage of an interview that may have occurred was that there might have been direct negative interaction with
the interviewer. This did not happen. Another concern about the interview process was the respondents’ position to provide a subjective or biased reply. It is my opinion that the questions were answered in a manner that was direct and truthful. In this case, subjectivity was kept to a minimum, and in fact the only information reported in Chapter 4 is information that was provided by the respondents. The interviewer was objective in the recording of all responses.

Was the interviewer trained?

The interviewer over the years as a Trustee, in his professional and personal life has developed questioning technique in a manner that is balanced, unbiased, and objective. The information was recorded in a written format and reported accordingly. The interview was in fact a semi-structured interview. This semi structured interview provided the adaptability necessary to provide an environment in which the interviewee could feel comfortable.

The interview session was not audiotaped. The reason was the promise of the interviewer to provide true confidentiality to the individuals, who have high profiles within and outside the educational environment. The answers from the question session were immediately transcribed to ensure a complete understanding by the interviewer. They were then typewritten completely and reported in this thesis.

The questions were tested (focus group) on individuals to ensure that they were objective and unbiased. It was also the intention of this interviewer to ensure that these questions were not leading questions. This was necessary to ensure that the response would not invalidate the data that was provided by the interviewee.
The interview process was used due to the highly sensitive topic, called “Underfunding in Education.” The topic itself may not seem sensitive; however, the individuals that were interviewed wanted to protect themselves on this hypersensitive issue.

Individuals were not provided the questions beforehand. The interviews were conducted in a neutral location without any background noise to interrupt the flow and response of the participants.

There was a concern by the interviewer that in any type of research that is based on an interview process, the respondent could conceal information that they do not want others to know. This self-censoring could in fact provide a negative review of the interview methodology. This interviewer is convinced that the respondents were all forthcoming in their answers in a candid fashion.

Sample of convenience was used primarily because of the amount of time that was required to collect the extensive and necessary data for this thesis. There was also an issue of timing. Virtually all the interviews took place through the month of June. It was difficult to interview the respondents due to graduation timing, report card signing, budget analysis, and extensive year-end school activities (play days, exams, etc.). In some cases, interviewees were responsible to submit reports by June 30 to the school board office and deadlines (preliminary budgets 2007-2008) to the Ministry of Education. This sample of convenience had stakes in the education system.

It is now important to define the term stakeholders. Stakeholders are individuals that have a stake in the education system at DPCDSB. The stakeholders included individuals employed by DPCDSB at various levels within the organization. It also
included taxpayers that support DPCDSB and who have or do not have children within the system. These individuals in many cases had a “canvas view” of the education system and its budget process.

It was necessary for this interviewer to establish a good rapport with all the participants. It was critical to demonstrate an assurance of confidentiality for their responses. The individuals have not been identified in Chapter Four in their responses. The survey research collected information based on participants’ beliefs, attitudes, and intentions.

There were three areas that the interviewer addressed throughout his interview in this case study method.

1. The Description. Case study’s main purpose was to record responses from educational professionals and “outsiders looking in” directly. It was the intention to have them provide a very full description of the phenomenon known as “underfunding in education.” The intention was to recreate the history that brought DPCDSB to a situation of submitting a budget deficit. It was the hope of the interviewer that all responses were put into a proper context so that, when reported, the readers would have a sense of why the situation occurred. The information that was provided within the interview process was written as a literal response to the questions that were asked of the interviewees.

2. Explanation. The purpose of this case study was to draw an explanation of the underfunding in education. It was the intention of the interviewer to look for a pattern from the responses. This pattern could be either a causal or a relationship pattern. In all cases, the individuals that were interviewed have been interested in education for at least 8 years.
3. Evaluation. In the case of evaluation, the interviewer was looking for a pattern. It was the intention of the interviewer to use his 24 years of experience as Trustee to draw and compare on historical occurrences when the interviewees provided responses. The 24 years of experience on the school board also drew on the experience of sitting on a number of policy-oriented committees. This experience included the background as a member of policy setting committees, including acting as the Chair of the Administration and Finance Committee, Chair of Faith and Program, and Chair of the Audit Committee.

This case study in fact is a human-interest story that has resulted in two defined camps. One side is DPCDSB reporting that historically there has been an underfunding issue. The other side is the Ministry of Education with its early position that in fact it was a matter of mismanagement of funds. The Ministry changed in position as time moved along. The biggest change was when the investigators made a comment about educational funding.

The information that was provided by the interviewees has no reliability coefficient. This interviewer accepts the information provided in an authentic manner based on the content that was reported to him during the interview process.

In conclusion, the qualitative research that was carried out was intended so that the researcher would conduct an in-depth study of the educational underfunding formula and the result to DPCDSB. It was done with the intention of being objective in perspective on this particular issue.
CHAPTER FOUR: THE INTERVIEWS

The interviews took place during the last 2 months of the school year. It was difficult to interview the respondents due to graduation timing and extensive year-end school activities (play days, exams, etc.). In addition to the time constraints, some of the interviewees were responsible to submit reports by June 30 to the school board office and deadlines (preliminary budgets 2007-2008) to the Ministry of Education.

The interviews involved a number of stakeholders. These individuals were from various perspectives relative to the educational setting and community at large. The interviewees were external and internal to DPCDSB. The meetings were arranged in neutral settings to ensure minimal disruption. There were 13 questions asked of the interviewees.

**Question #1: When was it evident that there was a budget deficit?**

The respondents reported that on the average they knew about the potential budget difficulty about 3 years prior to the Ministry of Education nominating and installing the Chair of the Co-Management Team at DPCDSB. In the build-up to the filing of a deficit budget by the DPCDSB, there were a number of issues foretelling the underfunding concerns of the school board.

In respect to respondents who were involved within the school setting, the senior staff (principals, department heads, etc.) in the process, budgets were tight and that overspending would not be allowed. In fact, senior staff made comments that overspending would be detrimental to the school board’s budget. “It was imperative to save money to help the school board.”
The Ministry of Education recognized that the issue of the deficit budget at other school boards might occur in the not-too-distant future. The first concern started when the Ministry of Education began tracking the Toronto District School Board (TDSB) budget concerns a few years prior. The Ministry of Education would normally permit school boards to submit a deficit budget, provided it would stay within a 1% allowance. The Ministry looked at all expenditure lines from school boards and the funding envelopes. These included all expenditure lines as well as labour costs, transportation costs, and special education.

It is interesting that interviewees did not realize there was a funding crisis until the issue was addressed in local media. The local media became interested in the budget crisis at DPCDSB after the famous post card campaign (see Figures 1 and 2). The interviewee said, “As long as the child is being taught and the school doors are open in the morning, everything is okay.”

There were over 33,000 cards delivered to the Premier of Ontario through a local member of the provincial parliament. This Trustee, with the school board Chair and other profile community representatives, delivered the postcards to the Brampton MPP Queens Park office to bring a profile to this critical campaign. The intention was to encourage the press to highlight the underfunding campaign.

**Question #2: Why is DPCDSB in this situation?**

The respondents commented that they generally believed that it was poor planning on the part of DPCDSB that caused the crisis. They felt that DPCDSB did not communicate the story of a budget crisis to the Ministry of Education in a timely manner that would highlight the upcoming crisis. It was also noted that the lack of budget
transparency to the public suffered during the period leading up to the announcement of the budget crisis.

The participants within school settings commented that poor planning was a result of a top-down management approach. The issue was laid at the doorsteps of the principal’s office and their school budget secretaries. They also said that the principals did not effectively communicate the serious budget crisis early to staff at the school level. The interviewee said, “So how were we to take the message late in the fiscal year and make the necessary cuts to save money for the budget?”

A comment was made, “there were no paper reports. There was no paper trail, so nothing could ever be traced. Information about actual expenditures compared to budget forecast was not easily accessible.”

“The cuts requested by senior school board staff were unfair.” They [school board staff] should ask teachers where to make cuts, because teachers are at the frontline of the educational system.”

The above comment against the DPCDSB was balanced when some interviewees said that the Ministry’s approach to funding lacked foresight. They continued that the school board found it necessary to fund from various envelopes to meet the needs of salaries, transportation, and special education. This action by DPCDSB placed undue stress on the school board and drove it to a financial crisis. The Ministry, the interviewee said, would start new programs to drive their political agendas forward to look good to the public, but the Ministry did not provide sufficient funds for the real cost of education.

The respondents also reported that benchmarks did not really meet the true costs of educational expenditures. They felt that it was partially a balance of mismanagement
of dollars by DPCDSB and that there is an historical context to this issue. The crisis was when the Ministry contributed to the financial shortfall by not fixing the funding formula for DPCDSB. The mismanagement of budget was a broad-stroke comment. It was that the school board found it necessary to spend money from other envelopes to achieve a local short-term solution for the much-awaited funding formula “fix.”

One interviewee questioned, “Was this budget over expenditure a mismanagement of the financial reserves of the school board a political move on the part of DPCDSB? Alternatively, was it, in fact, DPCDSB generally using the financial reserves to address the lack of funding for the noted areas of fiscal concern?”

Prior to 1998, the mill rate was used to supplement the budget provided by the Ministry grants. The money collected from business and residential property taxes was used to address the additional education dollars necessary so that school boards could cover the true cost of education and meet the local issue(s). School boards supplement ministerial grants using the mill rate.

The coterminous PBE had a larger assessment base and was therefore able to collect more money for education from its mill rate than DPCDSB. It is interesting that a respondent referred to this, even though the education funding formula had changed years ago.

One of the stakeholders used the term, “where is the financial restraint? Did the school board waste money on a palace and building expensive school locations? Why would they spend more money than they have coming in?” These questions are valid given the fact that they highlight a perspective of a respondent unaware of the funding formula arrangement between school boards and the Ministry.
Question #3: What is your opinion on the three areas of concern to DPCDSB?

Transportation

The respondents mentioned that in 1997 the transportation formula changed. The DPCDSB and the PBE had organized a consortium to deliver a shared transportation system within their coterminous jurisdiction. This was done to save money for the local taxpayer. It was unfortunate that in 1998 the Ministry of Education changed the transportation funding formula and did not recognize the benefits that the two school boards achieved by combining their transportation systems. The Ministry of Education funded the transportation based on 1997 costs. The school boards had achieved efficiency and lowered costs by combining their transportation system. If the school boards had not changed the transportation system, the school boards would have received more money for transportation.

Transportation is an area that is underfunded; so said a respondent. It is curious to note that three of the respondents brought up this issue. One respondent commented that DPCDSB is receiving $8 less per child for transportation than the PBE. It surprised them because students could live essentially next door to one another and ride the same bus.

A staff member commented that the Ministry of Education balks at the actual cost of transporting students at DPCDSB. The Ministry of Education does not pay its fair share when it relates to special education transportation, regular transportation, and when it becomes necessary to redeploy students to a new site due to construction at their home school. “How do they expect children to attend a school that is under construction?”

One respondent said that transportation should be eliminated, and it is the responsibility of the parent/guardian to deliver the student to the school.
Salaries

A number of respondents commented that salaries at DPCDSB are too high. They stated that the salaries are unjustified when compared to the rest of the province of Ontario. An individual said that labour peace was achieved over 3 and a half years ago due to the salary arrangement. In other words, the additional monies paid to staff permit labour peace to exist within DPCDSB jurisdiction.

A number of teachers are at the higher end of the grid due to their experience level. The Ministry does not pay its fair share for the benefits costs and experience component of teachers’ experience.

The cost of living in DPCDSB jurisdiction may have made it is necessary to pay the higher salary compared to the balance of the province of Ontario.

An interviewee commented that they understand that only salaries were being addressed at the Ministry. The costs of benefits were not adequately addressed in the funding formula.

The contributor made a sarcastic comment that teachers are paid for a whole year for only 10 months work. They should be paid over a 12-month period.

Special Education

Special education was a number one priority for every respondent. They all felt that the province has both the moral and ethical obligation to deliver education to children that require special education. They are aware, however, that there will never be enough money to deliver special education so that everybody would be pleased. They all concluded with a similar statement: that the money should be spent on the child so that they can become members of the community at large.
They also mentioned that special education teachers are special to a child, and these students need additional funding to deliver a program that is deserved.

Question #4: What is your reaction to the Chair of the Co-Management Team (aka Supervisor)?

The interviewees used the term interchangeably.

Mr. Norbert Hartmann established the term, Chair of Co-Management Team. This was done to encourage Trustees to take part in mutually agreed discussions about where savings could be achieved within DPCDSB. He wanted the Trustees to take part in financial discussions. He would, however, make the final decision. The Trustees declined!

The contributors to the interview process commented that they do not appreciate a Chair of the Co-Management Team placed within DPCDSB by the Ministry of Education. They find this counterproductive, and it caused stress in an already difficult situation. The comment was made, “Trustees are democratically elected persons” to highlight that the Ministry does not respect the election process.

There were additional responses; they include:

1. That the Chair of the Co-Management Team in place is a good thing.
2. Supervisor will provide fresh eyes on how the school board operates and address the need to establish financial transparency at DPCDSB.
3. The Supervisor is removed from the day-to-day workings of the school board and therefore has less involvement in the “politics” that take place within an organization.
4. They also believed that the Supervisor would bring to the attention of the Ministry an unbiased report of the three main areas that are underfunded as noted by DPCDSB. These three areas are salaries, transportation, and special education.

Essentially, all respondents found it appalling that this individual is being paid $1,500/day to address the budget deficit at DPCDSB. This amount is on top of the costs of the investigators.

**Question #5: What is your reaction to the investigators that came to the school board in early 2006?**

They all agreed that audits are good and that the budget process needs protection. They also commented that if nothing is wrong, there is no need to worry about and audit it. They were pleased that the DPCDSB worked in a professional and transparent manner with investigators.

The downside of investigators is the intrinsic embarrassment that is felt by employees of the school board. There was a concern for the possibility of a loss of confidence with the organization. One individual commented that an investigator coming in would provide a sense of doubt with the organization. They agreed that the investigator, being impartial, would look for additional savings through consultation and a collaborative approach when dealing with the school board staff.

They felt this collaborative approach on the budget deficit would be best achieved by offering transparency and ensuring accountability for all monies spent by the school board the previous years. A respondent said, “How can someone who is appointed by the
Ministry be impartial when following a preestablished mandate that was established by that Ministry?”

**Question #6: What is the best-case scenario for Dufferin-Peel?**

They all agreed that DPCDSB will actually “grow” from this experience. There must be checks and balances to ensure that the school board is achieving its expenditure targets versus the budget made available by the Ministry of Education. Financial stability is the key; the political reality is that there is competition for funds from other Ministries.

They also responded that the Ministry and the Chair of the Co-Management Team must get out as quickly as possible. The Ministry of Education must ensure that the Catholic system stays intact. It must maintain its Catholic identity as permitted by the Constitution Act of 1867. The government should leave the school board alone, and the Catholic Trustees should run the school board as required according to the Act. One individual repeated a comment that they heard at a recent presentation by Sister Claire Fitzgerald, SSND, Ph.D. (Northeast Province of the school Sisters of Notre Dame, recipient awarded the 2006 Elizabeth Ann Seton Award). The quote was, “Show me your budget and I will tell you how Catholic you are.” The school board must maintain its Catholic teaching objective.

There was a definite concern that the entire Catholic education system would be under pressure province-wide if this budget situation were not addressed immediately.

**Question #7: How does DPCDSB get out of this?**

They all responded by saying, “Pay off the debt, it’s a new start. Spend only within your means and do not borrow.”
This is a new beginning, and a plan of strategic stability must be in place to achieve balanced budgets in the upcoming school year and beyond. The school board must balance the available budget of tomorrow for the unknown needs of the students of tomorrow.

There was a comment that the government was, in fact, hurting our children by implementing a 10% cut to school budgets as a cost saving. The individual commented, “Why does the government not understand that the true cost of education is real and not what they think it is?” When they were asked to elaborate, they felt that the government is actually micromanaging the education system and imposing what the government believes is the cost of education. The Ministry has set its own benchmark.

**Question #8: What are the future areas of concern?**

There is a question that the number one future area of concern is that the government programs will have the money consistently available. This is so that it is possible to deliver an education system for the students of the future. They recognized that education funding in not a bottomless “bucket.” This finding would include all components of education including teacher salaries, transportation, special education, programming, literacy and numeracy, languages, mathematics, building, renovations, etc.

It was obvious by the response of one individual that DPCDSB must continue to compete for students with its coterminous school board, (PBE). This competition is at both the elementary and secondary levels. The school board must not lose students to the public school system, especially in the elementary years. The student in a PBE school is less likely to go to a Catholic high school at DPCDSB. This action by parents/guardians would damage the needed future student growth for DPCDSB, hasten the declining
enrolment, adding further pressure points to a strained budget. The comment made by an individual was, “We must ensure to meet the Catholic educational challenge of what parents want from the schools. Catholic parents do not always want a Catholic education for their child. They may just look for a school that is nearby.”

It is a concern also that the morale of the staff in the system is, at this time, very low. The individuals currently on staff are now doing more than they were originally hired to do. DPCDSB has been losing good people through attrition, retirement, or moving to another organization. These individuals are not being replaced. The school board had placed a hiring freeze early in the budget deliberation process (prior to Ministry involvement). This action of nonreplacement will cause damage to the school board’s efficiencies in the future.

The culture of the school board must also change. It should not be an inward-looking organization as it has in the past. It must look outside for fresh ideas.

The school board is also not unique in its challenges. However, the school board’s initiatives to challenge the underfunding issue have brought the crisis “top-of-mind” to the government, public, and the media.

**Question #9: What is the long-term solution?**

The interviewees unanimously agreed that the long-term solution would be to address the funding system through transparency and communication. They also agreed that the principals and vice principals, department heads, and senior staff must be equipped with a business acumen to ensure a balanced perspective is used when addressing budgets.
They do not want past practice to be the norm. There must be a vision to integrate with the leadership that is Catholic in perspective while delivering the long-term needs to meet all future budgets.

Trustees must continuously advocate for the needs of their students, looking for additional funds to deliver an educational system to their students.

There must be a coherent vision that will be delivered through a new strategic plan.

The one comment made, “Live within your means,” seemed appropriate at this time.

**Question #10: What is the short-term solution?**

The short-term solution is to immediately address the benchmark and the real cost of education. The DPCDSB Trustees must insist that its administration, including principals and vice principals, and staff (at all levels) maintain an open attitude with an “eye” on transparency on school budgets. These parties would also include staff and parents. There is also a necessity to change the culture that is currently in DPCDSB. This will be a slow process, but it must start as soon as possible. The Trustees must take over the school board as soon as possible and bring leadership to the system as a result of this budget crisis.

**Question #11: Has the government changed the funding formula?**

This response was an unqualified no. The respondents felt that the government had not changed the funding formula. They agree that the government has provided more money towards education, but this money has always been preallocated to specific programs. These programs seemed political in nature. The Ministry is not looking
forward to where its initiatives begin to cost the entire education system. An example used was the reduction in the number of primary students in the classroom. The school board, to achieve this Ministry (government) target, must purchase portables, build, or rearrange the classrooms. There will also be an increase in the number of split grades. The money necessary has not been allocated. The benefit of capping sizes is a laudable goal; however, not realistic, because school boards may, in fact, have to develop capital projects to address the number of classrooms to achieve the Ministry of Education commitment to the Ontario public.

There is little confidence that the government is, in fact, offering more money to deliver the real cost of education.

The interviewees also addressed the testing results for students. The government continues to mention that the test results have continued to improve to meet the government’s objectives. There was a comment made that the EQAO test scores are a reflection of a test that has changed over the years. There is a general feeling that the Ministry is not addressing numeracy and literacy properly. The question that should be asked is, Are the EQAO results equivalent to those when the first tests were given to students?

They were generally pleased that the student graduation rate is increasing and the early school leaving rates are declining.

**Question #12: Give me a brief comment on the budget deficit and DPCDSB**

The comments can be summarized in the following points:

- Correct it.
- Demonstrate a commitment to your students.
The government must change the formula.

Underfunding has caused this problem.

Underfunding is a direct result of a damaged funding formula.

This is about power, not money.

**Question #13: What is your perception of the DPCDSB action to challenge the government on the funding formula relative to its community/stakeholders?**

The respondents felt that the external community was not kept informed prior to DPCDSB’s postcard initiative. The “Mr. Premier, please save our schools” postcards was a successful campaign. There were 33,000 cards delivered to the Ontario legislature. The respondents felt that other actions could have been taken prior to sending out these cards. The internal community was fully in support of the Trustees’ actions and reactions in its dealing with the Ministry of Education. There was a general feeling that the postcard campaign brought a positive reinforcement to highlight the underfunding issue. It showed that DPCDSB continued its commitment to its internal and external community. This includes students, parents, staff, and the Catholic education system.

They agreed that DPCDSB was alone in its challenge of the Ministry of Education funding formula. They felt that it was imperative to undertake this initiative for additional funding in the future. The DPCDSB was the leader again on the education scene.

The individuals, internal and external, in the DPCDSB community have now left it in the hands of the Trustees to continue to address the underfunding formula. The Trustees must continue to push for setting the necessary benchmarks that must be
established to achieve an equitable funding arrangement with all the school boards in Ontario.

There is a general feeling that the local priorities of DPCDSB are not being addressed by the existing funding formula. The stakeholders are encouraging DPCDSB to continue to request the Ministry of Education to meet its fundamental obligations of educating not only DPCDSB students but also all students in the province of Ontario.
CHAPTER FIVE: CONCLUSION

The three fundamental questions to this thesis are:

1. What events led DPCDSB to be in a position where the Ministry of Education appointed the Chair of Co-Management Team?
2. What impact have these events had on the stakeholders?
3. How to resolve the problem of educational funding in the Province of Ontario?

Response: What events led DPCDSB to be in a position where the Ministry of Education appointed the Chair of Co-Management Team?

In the 2005-2006 DPCDSB Directors Annual Report, Director Michael Bator (2007 p.#2) mentioned that there were pressures and distractions in funding issues and that the DPCDSB community would maintain its focus on the children and the provision of excellent programs and services. These words have been the rallying point for the Trustees.

He further wrote in the Annual Report that there were three realities within DPCDSB:

- We are a vibrant Catholic educational community that celebrates its faith in Jesus Christ and strives to live the gospel values within and beyond the local school. Our elementary and secondary schools proclaim their catholicity, not simply through icon or image, but through practice.
- We are a community that relies on partnership for our strength, in particular the partnership of home, school, and parish. We are strongest
when there is evidence of co-operation and collaboration between and
among Trustees, faculty, staff, parent/guardians, students, and pastors.

- We are a courageous community that does not shy away from addressing
  the challenges before us and seeking solutions on behalf of our students.
  We recognize the value of open communication with our partners at all
  levels of the community (Bator, 2007).

Director Bator concludes, “Let us continue in the spirit as we move forward in our great
tradition of excellence and Catholic education” (p.# 3).

On September 14, 2006, DPCDSB was in receipt of a letter written by Peter D.
Lauwers, who was requested by the Ministry to work with the school board to develop a
deficit management plan. He was an emissary, not a supervisor. This move was an
attempt by the Ministry to again ask the DPCDSB to balance its budget with the
implementation of “Plan B.” He advised DPCDSB that Section 231 of the Education Act
imposed legal obligation on the school board to pass a balanced budget that also would
accommodate any deficit of any previous year. Mr. Lauwers recommended what would
be commonly known as Plan B as a preferred method of reducing expenditures at the
school board. Plan B would, in Mr. Lauwers’ perspective, be preferred due to its
minimal impact on the system.

The Trustees maintained that any reduction in expenditures under whatever plan
would affect the classroom.

Education Minister Wynne addressed the DPCDSB at its regular school board
meeting on September 26, 2006. Kathleen Wynne, Minister of Education, wrote a
follow-up letter on September 29, 2006 to Michael Bator, confirming her respect for
Trustees and their important role in school board governance. This letter requested that the DPCDSB members, officers, and employees implement recommendations to eliminate the proposed deficit.

The patience of the Ministry ran its course, and on October 10, 2006, the Lieutenant Governor in Council concurred with the recommendation from the Minister of Education that control and charge over the administration of the affairs of DPCDSB would be vested in the Ministry of Education as provided in subsection 257.31 (3) of the Education Act. Nancy Nayler forwarded the letter to Director Michael Bator.

The preceding pages may appear to lay blame on the DPCDSB for not balancing its budget in the 2006-2007 school year. The literature, interviews, and all other support material available, and including my 24 years of experience as Trustee on the school board, would in fact suggest that the DPCDSB is not wholly responsible for submitting a deficit budget, as required according to Section 231 of the Education Act.

The DPCDSB over the previous 8 years, continued to advise the Ministry of Education of the drawback of its funding formula that had been established in 1997-1998 under the previous Progressive Conservative government.

On April 3, 2006, William R. McLean and Pierre Filiatrault submitted their investigators report on DPCDSB to the Ministry of Education. Their concluding paragraph stated “that the school board officials made it very clear to these writers that a large part of the school board’s frustration was due to the perception that the message to the Ministry of Education relative to the inherent problems that the funding model was not being heard.” McLean and Filiatrault continued, “Their many discussions with the senior officials of the Ministry had made clear to them that the Ministry was well aware
of the problems the school board was having with the funding model. The school board can thus be rest assured that their messages were indeed heard.”

This is clearly a situation where the “need to be fixed” current funding formula added undue financial hardship to DPCDSB. The funding formula was and is broken.

The DPCDSB was to choose between balancing the budget based on a faulty funding formula model and the education of its students, while meeting the micromanaging demands of the Ministry of Education. The Trustees found it unpalatable, decided, with its parents/guardians, and interested other stakeholders’ support, to defy the Ministry of Education. DPCDSB had no choice but to morally support its students.

The McGuinty government was in its third year of its mandate, and still there were no indications of the funding formula being addressed. There was additional money coming from the Ministry, but it was “earmarked” for specific projects. Early in this budget discussion, Minister Kennedy said that mismanagement was the problem. However, clearly, it was not a mismanagement issue but in fact an issue where the Ministry did not address true benchmarks which were current relative to the real cost of education.

The Report of the Education Equality Task force, 2002, dated December 10, 2002, written by Mordechai Rozanski, made a key point. Its first recommendation was that the Ministry of Education update the benchmark costs of all components of the funding formula (the Foundation Grant, the Special Purposes Grant, and the Pupil Accommodation Grant) to reflect costs through to August 2003. The funding formulas
should reflect these updated benchmark costs and be phased over 3 years, starting at the 2003-2004 school year, as part of a multiyear foundation plan.

He estimated that to update benchmark costs through to August 2003 would cost a total $1.08 billion dollars. This excluded the additional costs of updating salaries and benefits in 2002-2003. It was obvious that the Ministry of Education at that time did not react to Mr. Rozanski’s (2002) report.

DPCDSB costs continued to mount until it began debilitating this school board in delivering the education that it believed the students deserved. The school board had to dip into its financial reserves to balance the budget. Leading up to present, other school boards also had a difficult time balancing their budgets.

Mr. Rozanski’s third recommendation asked the Ministry of Education, in consultation with school boards and other members of the education community, to develop mechanisms for annual review in updating the benchmarks in the funding formula and for conducting a more comprehensive overall review of the funding formula every 5 years. It was clear that in its first, second, and third year government mandate, the Ministry of Education was keener in introducing programs and beginning new initiatives to placate the public, and they continued to place incredible increased costs on the school board.

In fact, interestingly, Kathleen Wynne, on October 24, 2006, wrote a letter to school board Chairs in preparation for early release of grants for student needs (GSN) for 2007-2008. The Minister of Education was interested in proving the funding formula as a key priority for the McGuinty government. In her letter, she commented, “we have made tremendous progress in moving from a one size fits all, bare bones, funding model
Kathleen Wynne wrote, “The goal of this government is to reach every student so that our young people are engaged, learning, and focused on a promising future. The Ministry of Education had allocated over $2.7 million dollars in increased education funding to support that goal.” She encouraged ongoing and constructive exchange to improve the government’s investment in education and for this action. She must be applauded for this initiative.

Did DPCDSB actions cause the McGuinty government to react to funding concerns through the Ministry of Education? The answer is an unqualified yes.

DPCDSB did not go into its process of defying the government without first trying to address its financial shortfall. What did the school board do? These are only some of the cost-saving measures that DPCDSB put in place to deal with its financial difficulties. They

- On March 10, 2005, initiated strategic hiring review to save $1.6 million.
- Did not increase school budgets over the last 10 years.
- Annually reviewed and if necessary adjusted school start and finish times to optimize routing solutions.
- Implemented VoIP phone services so it did not have to replace over $1 million worth of phone system gear.

The school board participated in a number of provincial consortiums to realize savings. These actions included:

- purchase of goods
• purchase of utilities
• debentures
• benefits
• computer enhancements

Other efficiencies that were realized were:

*Teachers*

• through collective bargaining it negotiated the end of retirement gratuity for all staff who commenced employment after 1979.

• cap on supply teacher budgets.

*Principals/Vice Principals*

• not replacing principals and vice principals who were on sick leave.

• flexibility in the assignment of principals and vice principals.

*Other Staff*

• cut secretarial summer additional hours.

• the school board, through its collective agreement language, would be allowed to utilize contract and temporary workers.

• the school board did not replace staff who had retired or who were absent for short durations of time.

• kept within provincial mandate for salaries and no increases to benefits.

*Special Education*

Special education savings were achieved through

• no new ERWs/EAs hired since 2003-2004.
• no new hires of elementary/secondary special education teachers in the last 2 years.

Special Education Operating Expenditure

• DPCDSB has created a parent/guardian system process that is clear for special education claims and approvals.

• Program specialization initiatives align to literacy and numeracy secretarial direction.

The *Toronto Star* editorial (All schools Not Created Equal, 2006) had a succinct message to the Liberal government. It said, “clearly one size fits all approach cannot meet the unique needs of each school board. That’s why the current school funding formula which has not been changed in eight years needs a major overhaul.”

The article continued, “After it [Liberal Government] was elected in 2003, it vowed to bring in a new funding formula.” The government did pump additional money into the system; however, much of it was allocated.

Some of the money provided by the Ministry went to pay higher teacher salaries. The government claimed the money had fixed the problem. This is misleading, because the one-size-fits-all approach still existed. Premier Dalton McGuinty and the Liberals deserved praise for putting money back into education, but a large part of the new funds was earmarked for special programs such as cutting class sizes and hiring new specialty education teachers.

It is clear the DPCDSB through its actions brought the attention to the Ministry of Education and media a response that underfunding of education is a crisis in the largest
province in Canada. DPCDSB wants the establishment of equity, not necessarily equality. There is a definitive uncompromising need for realistic benchmarks from which school boards including DPCDSB can properly address the real cost of education. It is imperative that the Ministry move to this benchmarking sooner rather than later.

**Response: What impact have these events had on stakeholders?**

The impact of the government supervisor and the budget scenario to the system has been close to catastrophic. The first casualty was morale. Morale within the system that employs 10,000 individuals has suffered. At the Catholic Education Centre (CEC), the continuous presence of Ministry personnel has placed everyone in a high state of anxiety.

Staff has left either of their own accord or due to retirement and was not replaced. The additional workload was picked up by the remaining staff. They must then increase their workload to address the many needs of the system and the multitude of Ministry reports that are required. This workload is obvious when Trustees ask for reports and there is an extensive delay in preparing and delivery of the information.

The unions were supportive of the Trustees’ actions to bring forward a budget that was not balanced. The unions did not want to endure the brunt of the cuts. These cuts would be necessary to balance the budget due to the inaction of the Ministry of Education in not addressing the funding formula and its resultant shortfall. Union members were present at essentially all school board and committee meetings.

The parents/guardians in many cases did not attend the many meetings held due to various reasons. The parents/guardians are in two categories. The first group are parents/guardians that are intricately involved in their child’s education, and the second
group are parents/guardians who, through no fault of their own (due to work schedules, etc.), cannot be involved in their child’s education.

The Ministry, through its representative, on November 28, 2006, introduced expenditure constraints of a 10% budget reduction to all cost centers to and including August 31, 2007. This one-time temporary measure was designed to achieve a saving of $2.9 million. The school board was also required to improve its planning and control by all managers. It was also required to enhance improvement in the school board procurement practices through leveraging purchasing power, expanding the use of bulk purchase, and interagency consortia.

Many parents/guardians feel that school council had make up the 10% cut at school level through fundraising programs. This addition of a fundraising program in schools will create have and have-not schools. The establishment of additional fundraising programs would in its own way be a form of indirect taxation. Schools that have aggressive school councils and in areas of affluence will find it easier to raise the additional monies due to these cuts. The school councils that are otherwise will have a student school population in a deficit learning position.

Parents/guardians called this Trustee outlining their concerns and disappointment in their home school; children are doing without the basics within the classroom. The DPCDSB is concerned and continues on its position that cuts have affected the classroom. This is happening.

A group that did not concern themselves with a deficit budget was individuals with no children in the system. Their response was generally, “Get your house in order. Live within your means, and come out of it as required by the Education Act.”
The teachers within the school board have felt an unrelenting pressure due to school budget cuts. Teachers have, in the past, used their own money to supplement classroom supplies that should be paid for by the school budget. The 10% cut has added an additional financial impact to teachers when they personally spend additional money for basic classroom material. What impact the deficit budget has had on the system is, to put it in one word, substantial!

Response: How to resolve the problem of educational funding in the province of Ontario?

Removal of the Chair of the Co-Management Team

The elimination of the budget deficit at DPCDSB and the removal of the Chair of the Co-Management Team is the objective of the school board.

The Chair of the Co-Management Team took over the administration (February 5) of the school board and its budgets. It will require a “financial and administrative and negotiated dance” between the Trustees and the Chair of the Co-Management Team to ensure that cuts are kept away from the classroom.

The Trustees elected in November 2006 are the community representatives, and they have the moral and ethical responsibility to ensure that the Catholic education system known as DPCDSB continues to exist as allowed by the Constitution Act of 1867. The Trustees of the DPCDSB have been unequivocal to providing an open and transparent position in their dealing with the Ministry. They have directed their staff to ensure that the financial data of the school board remain available to Ministry-appointed personnel.

Ministry of Education New Programs and Initiatives
The Ministry of Education must introduce new programs and initiative only after thorough discussion with school boards and their respective organizations.

A classic situation is the current 20:1 ratio for primary classrooms. The Ministry did not fully appreciate the difficulty for school boards to implement this initiative when there is a shortage of classrooms within school board systems. The Ministry then issued a statement that will allow school boards a little extra time to meet the governments’ objective.

Whereas the benefit to students can be seen by parents/guardians and educators, the actual implementation is a cause for concern.

It is also understood that with new programs, initiatives, etc., ongoing funding should be in place to meet the real cost of delivering the program.

Addressing Costs of Declining Enrolment

DPCDSB, as one of many school boards in Ontario, will soon face declining enrolment within its school system. This enrolment decrease will occur after many years of increases in the number of students entering the school board system. The reasons were a result of the continuing influx of young families moving into its jurisdiction. The other reason is relatively inexpensive housing for individual families with children. The cost of living is also less expensive within the jurisdiction of DPCDSB.

This declining enrolment will create cost pressures that will need to be addressed in the near future at DPCDSB. The declining enrolment and its embedded fixed and variable costs within the system will necessitate a brand new way of thinking on how to run a school board. The infrastructure including staff, plants (schools), and support personnel will not be protected from the reality of budget shortfalls. The infrastructure
will be built on the needs of a specific number of students, but the decline will require cost adjustments as this number decreases over time.

In the immediate future, DPCDSB continues to grow in the Brampton, Caledon, and Orangeville areas. There will be requirements to build additional schools in these areas of growth, whereas there is a declining student enrolment in the areas south of Burnhamthorpe Boulevard between the eastern municipal school board with Toronto and western municipal school board with Oakville in the city of Mississauga. This decline may result in school closures in the near future. These schools, even when they are closed, continue to carry a cost to the taxpayer. The carrying costs will be covered by the grants that were intended to address the costs of education of students in the northern part of DPCDSB.

Mordechai Rozanski (2002), in the EETF (p.#56), recommended the Ministry of Education extend the duration of the declining enrolment adjustments to 3 years. The investigation report by McLean and Filiatrault (2006, p.#32) requested the Ministry of Education, in their Recommendation 26, to publish as soon as possible the guidelines for which school boards may close schools. The need to close schools may reduce the cost of operating plants that are not economically feasible. The process will provide undue hardship on communities where schools may be “pitted” against each other in their respective Educational Administrative Service Areas (EASA). The closing of schools may also cause parents/guardians to choose a school at their child’s early age that is close to their home instead of a Catholic school.

It is obvious that a potential announcement of school closure may in fact hasten the closure. The child enrolled in an elementary school other than a Catholic school...
may then choose a non-Catholic high school. This will then affect the “down river” enrolment numbers, causing a potential shortage of students at the Catholic high school.

*Reduce Transportation Costs*

The school board can also reduce its transportation costs by not providing busing to schools of choice and magnet schools. The parent/guardian would incur the cost if they chose the above schools.

There have been requests by parents to allow them to develop a private bus system for ineligible students requesting busing at DPCDSB. They also asked if they could “piggy back” on the DPCDSB system to obtain the best price possible based on the combined volume of students being bused.

There was an experiment many years ago at DPCDSB of offering bus tickets to students. The students became microentrepreneurs and in some cases sold the tickets.

It has been considered that an arm’s-length school board transportation system be set up as a non profit entity. The costs of the system to transport would be charged back to the school board to the extent that funds were available.

There is agreement that consortiums must be set up with coterminous school boards to minimize costs and optimize school transportation usage.

*Other Ministries Paying the Education Costs*

The school board should ask the government of Ontario through the Ministry of Education to react to Rozanski’s (2002) Recommendation 13. This recommendation requires the government to establish a cabinet level advisory council on integrated services for children and families. This would include representatives from: Ministry of Education; Ministry of Finance; Ministry of Transportation, Ministry of Labour; Ministry
of Children and Youth Services; Ministry of Citizenship and Immigration; Ministry of Community and Social Services; Ministry of the Environment; and Ministry of Health to meet on a regular basis to align the funding mechanisms of the ministries that serve families, children, and youth.

The setting establishing an advisory council will set up a process and formula to make their respective funds available to the Ministry of Education (used as a conduit) so it may provide the services that in fact belong to these other ministries. The other ministries should pay their fair share to meet the needs of student(s) still in school in the province of Ontario and especially children within the school system.

This arrangement will require the above-mentioned ministries and others from time to time to become integrated into the funding formula that would be forwarded to school boards.

*GST and PST Rebates*

The DPCDSB continues to address this budget dilemma by pressing the federal government for rebates in the Goods and Services tax (GST) portion that is paid for running the school board. The estimated amount of savings in 2006-2007 would be approximately $1.2 million. The federal government must understand that this GST is, in fact, an input tax credit that should be paid back to school boards when delivering an educational service to the students specifically within the province of Ontario and generally in Canada. The GST rebate would be ongoing, provided the expenditure was for items used for the purpose of education for the students.

The DPCDSB, through its membership in the Ontario Catholic School Trustees Association (OCSTA), must also petition the Ministry of Finance for the Province of
Ontario for Provincial Sales Tax (PST) partial rebates on payments to operate a school board. The benefit for DPCDSB is $6.4 million in 2006/2007 school year.

This rebate will assist the many school boards that may be facing declining enrolment. The money could be used by the school board to offset the grants that are reduced on a per pupil basis as the student population decreases. It will provide time to adjust their costs for running the school system.

This PST rebate for DPCDSB would be a 5-year plan and would work as follows (based on 2006/2007) expenditures:

Year 1: 80% rebate would be forwarded to the school board for purchases of products that were needed within the schools and school board. (Saving $5,120,000)*

Year 2: 75% would be forwarded to the school board for purchasing of products that were needed within the schools and school board (Saving $4,800,000)*

Year 3: 70% would be forwarded to the school board for purchasing of products that were needed within the schools and school board (Saving $4,480,000)*

Year 4: 65% would be forwarded to the school board for purchasing of products that were needed within the schools and school board (Saving $4,160,000)*

Year 5: 60% would be forwarded to the school board for purchasing of products that were needed within the schools and school board (Saving $3,800,000)*

Year 6 and beyond: There would be a rebate of 50%* of the PST paid by school boards.

*The above is a straight-line payment program based on one-year PST payment at DPCDSB in 2006/2007. The actual amounts would be rebated on the previous fiscal year PST payments.
This PST rebate is consumption based and will provide the additional funds necessary to meet the real cost of education. This rebate will provide the opportunity to adjust to the costs due to the declining enrolment in schools in DPCDSB and schools in Ontario.

*Municipal Tax Dollars*

The DPCDSB must also petition the government to require the City of Mississauga, Brampton, Caledon, and Orangeville that collect property taxes to forward all monies to DPCDSB at least six times a year. The months would be February, April, June, August, October, and December. These monies would provide a reasonable and consistent cash flow. It would also reduce the need for school boards to temporarily borrow money when there is a negative cash flow in that particular period. The money is collected by the municipality and rightfully belongs to the coterminous school boards. The cost of borrowing is a direct cost to the budget of the school board.

An example using the city of Mississauga is that it collects taxes six times a year and pays to the school board its portion only four times a year. It is obvious that the money is sitting in the city of Mississauga treasury earning interest (income) when school boards are paying interest.

*Collective Agreements*

Another potential savings opportunity would be to address the collective agreements at elementary and secondary school levels at DPCDSB (and other school boards).
Presently, teachers are paid from the period of September to June. In the month of December, the final pay represents $\frac{2}{26}$th of their gross amount. In June, the final pay represents $\frac{4}{26}$th of the gross amount.

It becomes necessary at times for the school board to borrow money when such large amounts of dollars are paid to staff in lump sum payments. It is recommended that the December pay period maintain that $\frac{2}{26}$th scheduled payment. It is further recommended that the final payment in June will be $\frac{2}{26}$th. This will then require the school board to issue one payment of $\frac{1}{26}$th in mid-July and $\frac{1}{26}$th in mid-August.

The money saved would assist DPCDSB to not use their line of credit.

**Business Taxes**

It is recommended that the provincial government be requested to allow business taxes be paid to the respective school boards based on student enrolment. In other words, all business taxes, regardless of tax support, would be paid to school boards based on a prorated basis using the Ministry reporting dates from the previous year’s enrolment.

This would equalize payment between the school boards based on a student enrolment not assessment type.

**English as a Second Language (ESL)**

DPCDSB must formally request funding of English as a Second Language (ESL) classes for all immigrant students. It is important that the federal government directly pay its fair share to the Ministry of Education (as a conduit) to meet the needs of new immigrants.
The issue here is that education is a provincial responsibility according to the Constitution act. It could be argued that ESL is in fact a social requirement rather than an educational requirement.

Charitable Status

School boards should be encouraged to set themselves up as charitable organizations. This would provide the opportunity to obtain funding directly from interested individuals and organizations. This would allow school boards to issue tax receipts to donors.

Fundraising Opportunities

School boards should be aggressive in developing a fundraising program that would benefit their students.

There is a concern that some fundraising would provide a negative cash flow from the Ministry to school boards. An example is that parents are not permitted to pay for busing. If this payment were made, it would be noted as negative grant to the Ministry. This would result in an equal amount of grant being withheld by the Ministry.

Development Lot Levy

This source of funding will eventually run its course when all available land is used for building. The school boards must therefore forecast their budgets, recognizing that this funding source will be not be available in the future.

Mill-Rate Assessment / Municipality contribution

There is little interest in returning to a mill-rate system for school boards. In the past, property owners would establish their preference by choosing being either a public
school supporter or a separate school supporter. The mill rate would then be established and the municipality, for education purposes, would collect the resulting funds.

Instead of a mill-rate assessment, a city would contribute a set amount to school boards based on enrolment as a form of grants. There would be no city without schools in their neighbourhoods. The school provides a focal point where there are playgrounds, gyms, after-hour meeting rooms, etc, which adds to a city’s dynamics, culture, and environment. A small grant would assist in the cost to provide each community within a city a location to be drawn together.

New Initiatives—Strategic Plan

It is recommended that the school board should also address a new strategic plan, organizational plan, and mission statement to address the realities of postministerial involvement of DPCDSB.

Real Cost of Education

There is no doubt that DPCDSB would not be in this situation had the real costs of education been addressed by the Ministry of Education.

The government of Ontario, through it Ministry of Education, must set a funding formula to meet the many needs of school boards throughout Ontario. This funding formula must be real and effective. It must be addressed yearly through representatives of the school boards, their associations, and of course the Ministry of Education and their partners.

The Ministry must not micromanage the “system” but in fact put in place a transparent and effective reporting system to ensure that the grants are used where intended.
There must be a period of at least 3 years prior to any change to directions on how to spend grants provided by the Ministry. The school boards must be provided the time to adjust their programs to ensure there is money available for the programs. An example was the pull-back of special education funding by the Ministry. This was unfair to some school boards in the province.

*Place of Adjudication*

The Ministry of Education must set up a system where school boards may submit their case to an unbiased agency. This will provide an avenue where all parties can be heard and the result would be binding on all sides. There must be no politics in education, only an interest in educating our children.

The courts are expensive and time-consuming. The school year is a short time to discuss issues that are critical that require both sides to discuss back and forth.

This agency/department would provide a timely and binding response to all parties concerned.

There are a number of other questions that this thesis does not address that are important to present and to future students within the province of Ontario. These questions must be answered. Further investigations are necessary to establish and readjust (as required) a proper funding formula that would address the basics of education while meeting the local priorities as set by the school board and their communities.

There is agreement with stakeholders that money is not the solution, because the problems are inherently systemic.
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