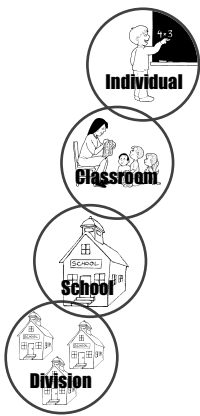# Section 2:
Planning for Inclusive Schools

SECTION 2: PLANNING FOR INCLUSIVE SCHOOLS ▬▬

Developing and Implementing an Annual School Plan

School Plans are developed annually by a planning team.

This section of the document outlines some planning concepts, primary planning issues, and guiding principles to assist school communities in initiating or enhancing their planning processes.

The information presented here reflects the essential concepts and processes identified in the planning literature. The emphasis is on long-term strategic planning with a focus on creating a clear purpose and direction for a school community. Some of the steps in the strategic planning process, such as vision building or writing a mission statement, need not take place annually. The vision and mission chosen by a school community, however, need to remain open to revision in response to a changing environment.

Annual School Plans address the knowledge, skills, and attitudes that students are expected to acquire before graduation, and the strengths and needs of school communities. Plans also reflect the diversity of student supports, divisional/district priorities, and link to departmental priorities. For these reasons, reporting templates summarizing the planning processes for early childhood achievement, and division/district planning have been included in the Appendices (Appendix F, pages A19-A30). Planning for inclusive schools takes into consideration all levels of planning for all students and staff.

School Plans are developed by a planning team consisting of school, parental, and community representatives. The participation of teachers and representatives of Advisory Councils for School Leadership on the planning team is governed by legislation. The regulations for *The Education Administration Act* state: "A principal must involve teachers in any planning process that is undertaken for the school" (The Education Administration Miscellaneous Provisions Regulation, Section 31) and "An Advisory Council may participate in developing an Annual School Plan" (Advisory Councils on School Leadership Regulation, Section 32[2e]). A school can use whatever planning process complements its administrative style and organizational structure.

Over time, the planning process evolves. As planners begin to collect and analyze information gleaned from needs assessments and other available data, they begin to deepen and broaden the linkages among data, decision making, implementation, analysis, and reporting. The following eight-step chart illustrates the development of the planning and reporting process. While the steps are described sequentially, it should be noted that plans will develop at different rates within and across steps over time, and planning teams may engage in multiple steps simultaneously.

Steps in Planning and Reporting

Step 1: Preparation (Visioning and Identifying Needs)

- forming a planning team (p. 2.7)
- identifying strengths and areas for improvement, monitoring, and/or evaluation (p. 2.12)
- identifying educational priorities (including linkages to divisional and provincial priorities) (p. 2.15)
- selecting strategies to achieve priorities and outcomes (p. 2.16)

Step 2: Identifying Data Sources and Data Collection

- conducting a needs assessment (formal/informal) (p. 2.23)
- identifying data sources and indicator categories (p. 2.22)
- linking needs to available data (p. 2.24)
- selecting and/or creating measurement instruments (formal/informal) (p. 2.19)
- timetabling (creating a schedule for planning, data collection, and communication) (p. 2.21)
- collecting data (p. 2.24)

Step 3: Data Analysis and Decision Making

- identifying priorities and outcomes that emerge from data (p. 2.26)
- writing SMART outcomes based on data (p. 2.13)
- obtaining plan feedback and support (p. 2.21)

Step 4: Drafting the School Plan

- drafting a school mission statement, priorities, profile, outcomes, professional development activities, parental and community involvement initiatives, summary of the budget, detailed outcome information for previous year (p. 3.3)

Step 5: Sharing the Draft Plan and Finalizing the Plan

- checking for comprehensiveness (p. 3.5)
- editing/proofreading (using plain language) (p. 3.4)
- obtaining plan approval by school community and school board (p. 3.6)
- writing the final document (p. 3.5)

Step 6: School Planning Report

- completing the provincial template by summarizing the contents of the Annual School Plan (p. 4.3)
- linking the School Planning Report to the Student Services Report (p. 4.3)
- linking the School Planning Report to the Division Planning Report (pp. 1.5, 4.3)

Step 7: Drafting the Community Report

- creating a Community Report reflecting key outcomes and priorities from the School Plan that are of particular interest to parents (p. 4.6)
- including contextual information such as school mission statement, school profile (e.g., programs, demographics), school priorities and linkages to division/district priorities, parental and community involvement initiatives, summary of previous year's report (p. 4.9)

Step 8: Sharing the Draft Plan and Finalizing the Report

- checking for completeness (p. 4.12)
- editing/proofreading (using plain language) (p. 4.12)
- obtaining plan approval by school community and school board (p. 4.12)
- writing the final Community Report (p. 4.12)
- sharing the document with school staff prior to distribution of the report (p. 4.12)

Preparing to Plan

Shared roles and responsibilities are essential to effective School Plans.

"To achieve a truly inclusive school community, all stakeholders need to have a voice in planning and implementing new directions."

Fisher, Sax, and Pumpian

The preparation and implementation of effective Annual School Plans are shared responsibilities. School principals take the lead in organizing and implementing School Plans. They involve school staff, parents, and community members in an ongoing, active, collaborative process to develop the plans. Students may also be invited to participate. Principals are responsible for submitting plans to school boards for review and approval, and for ensuring that key elements of the plans are communicated to all parents and to community members. Throughout the planning process, principals maintain an open line of communication between the school and the board office and ensure that divisional and district priorities and concerns are reflected in School Plans. Principals are also responsible for submitting School Planning Reports to the Department annually. A provincial sample of Annual School Plans, upon which each School Planning Report is based, will be reviewed annually.

Principals seek representation on the planning team from the community. Advisory Councils for School Leadership, representatives from school committees, parent councils, Healthy Child initiatives, and/or Home and School Associations are excellent sources for representation. Parents and community members who do not sit on an Advisory Council for School Leadership or a parent council may direct their ideas and concerns through a council representative. Where no form of parent council exists, principals solicit involvement from the general community to assist with planning.

To prepare and implement meaningful plans, school communities require the support and commitment of school boards. Boards review and approve Annual School Plans to ensure that they can be implemented. Divisional and district staff support the planning process by helping to identify educational priorities and by leading or coordinating planning activities.

The school principal is the co-ordinator of the planning process, responsible for organizing and implementing the School Plan. Planning needs to begin early, with an eye to inviting broad participation and diverse points of view, considering issues such as team formation, orientation, mandate, and time expectations.

To aid in time management for planning, a blank monthly planner, a sample of a completed monthly planner, and a generic timeline are displayed in Appendix E.

Team Formation

The formation of a planning team is a particularly successful method for initiating, implementing, monitoring, and revising plans. A team helps to identify, clarify, and balance the concerns of many people and groups. For most effective group dynamics, limit team size to eight to ten members. Some teams maintain a smaller size (five to seven members) but hold open meetings for everyone to attend. This approach helps to ensure that everyone who has an interest in participating is part of the process.

Involving key partners on the planning team, particularly people directly affected by a planned initiative, should happen immediately to give people the ownership that is critical to the sustainability and success of the plan. This success is unlikely to happen if people feel no control over the change affecting them.

Invitations to participate on a planning team may be extended to every member of the school staff and to the representatives of Advisory Councils for School Leadership or the Parent Council. These stakeholders may also be provided with opportunities to be involved in the planning process in other ways. Participants, for example, could join one of the various subcommittees that are routinely formed to assist in the planning.

Self-selection or election by a majority is preferred to an appointment by a principal. Generally, an already established working group, such as a professional development committee, is not designated as the planning team. Also avoid forming separate planning and implementation teams. Allowing individuals who are responsible for implementation to assist in planning their own activities is one of the best ways to foster accountability and commitment.

Potential Team Members

When considering the planning process, include divisional staff, teachers, counsellors, students, parents, and others who may aid the planning team, such as people from cultural associations, the business community, health agencies, and so on. Other potential members might include

*   department heads/chairpersons
*   school administrators
*   other school staff
*   parent representatives
*   community members

This list is in no way exhaustive and there are likely other partners that schools could include as part of the core planning team because they fit into a unique school or system context.

Student input may be obtained in a variety of ways, dependent upon age and stage of development.

Team members do not necessarily attend planning meetings. For instance, student input can be achieved through committee representation at the Senior Years, through student voice or surveys at the Middle Years, and through classroom discussions at the Early Years.

Being as inclusive as possible is especially critical at the outset so that a variety of perspectives inform the plan and essential supporters immediately opt in because they feel part of the process.

Tip: Identify key planning team members to communicate progress to subcommittees.

When forming subcommittees, have one member of the planning team take responsibility for opening lines of communication among the various groups within the school community (e.g., parents, classroom and resource teachers, counsellors, and students). The planning team will have ongoing discussions with the school community throughout the planning process.

Inviting active, participatory partnerships in the planning process
*   promotes sincere discussion and debate
*   fosters commitment within the school community
*   provides a more accurate representation of school community issues

Throughout the planning process, planning teams will be challenged with the task of reaching consensus both within the team and within the school community. In situations where the team cannot reach consensus, the process needs to continue to move forward while the team tries to obtain the highest possible level of agreement.

Team Considerations

Listed below are four key considerations to keep in mind regarding what may affect the team and its ability to carry out effective planning.

*   **Timing:** Planning and reporting are processes, not events, and the team should approach them as processes requiring time and patience.

    At the start of each process, team-building activities help to ensure that individuals "buy-in" because they see themselves as a valued part of a team engaged in a clearly outlined process to accomplish something worthwhile.

Tip: Identify one key person to lead and motivate the planning team.

*   **Risk Taking:** The team is more effective when it is supported as it takes the risk of engaging in planning and reporting processes that will be new to some people and that may require movement out of a comfort zone. This support should be built in at the organizational level.

*   **Leadership:** Strong leadership plays a critical role in the success of any organization or initiative.

    Research on school improvement has clearly revealed that having a key person in place to keep things on track and moving forward effectively is absolutely essential for the successful accomplishment of a plan.

    This key person, whether it is the principal or someone else, broadens the base of leadership so that there is shared commitment to keeping a plan or initiative going even if a key person leaves.

*   **Capacity Building:** A collaborative culture helps to develop leaders who can then generate commitment to continuous school or organizational improvement.

Team Orientation

Effective team functioning requires that members understand
*   the function, purpose, and priorities of the team effort
*   their roles, responsibilities, and tasks as part of the team

The orientation process provides team members with opportunities to ask questions, discuss planning and change processes, clarify their roles and responsibilities, and establish ground rules or guidelines to assist them when meeting as a team. It also identifies benefits of planning for the school staff, students, parents, and community relative to the effort involved. Providing team members with the opportunity to acquire team-building skills can strengthen team effectiveness.

Team Mandate

The team's mandate requires clarification at the start of the planning process. Team members need to be clear about what decisions, if any, the team can make on its own and when it will prepare recommendations for others to approve and carry out.

Time Expectations

The team should be clear and explicit about how much time team membership is likely to consume. Agreement to participate should be based on a clear understanding of the number of meetings anticipated, the length of meetings, and the responsibilities to be carried out between meetings. The amount of time required to prepare a plan and implement it successfully is usually underestimated. Periodically check agreements on time commitments to determine whether adjustments are needed. Failure to do this is a source of frustration in many team efforts and undermines the quality of the planning process.

Setting intermediate deadlines helps ensure that planning is completed as scheduled. This is especially important when subcommittees are working on different sections of the plan. Time is needed to circulate drafts for comments and revisions before submitting the final version. If plans are not reviewed carefully, important questions and issues may be overlooked.

Vision Building

A vision statement is a clearly written description of a shared dream or image of what a school community should or could become at some future point. An effective vision is broad enough to include all students and reflects the values of the school's community.

"The real voyage in discovery consists not in seeking new landscapes but in having new eyes."

Marcel Proust

To build a vision, a planning team initiates various concurrent activities that include
- arriving at a statement of beliefs
- collecting and analyzing data from sources outside and inside the school to assess current results, determine trends over an extended period, and identify desired results
- identifying the key factors that are critical to developing and maintaining an effective, caring school environment

Statement of Beliefs

The beliefs of team members and the groups they represent are identified and examined from various perspectives. The purpose is to provide the school community with opportunities to create and develop or rethink and reconsider

underlying philosophies and perspectives about education and schooling. The statement of beliefs that the team arrives at helps to establish the foundation for the school culture.

Priority Identification

Members of the planning team also place in priority order those factors they consider to be most crucial for the development and maintenance of an effective, caring school environment. Identifying these factors

- establishes items that must be given highest priority
- focuses planning efforts and resource allocation

Phases of the Planning Cycle

- Initiating
- Implementing
- Consolidating
- Renewing

The efficacy of school planning teams evolves over time. Although every team is unique, the same pattern of development emerges. All teams move through the phases of initiating, implementing, consolidating, and renewing. For some teams, this movement is rapid and smooth; for others, there is a steep learning curve that requires patience and time.

Initiating Phase

As school planning teams become more familiar with the planning and reporting process, they begin to broaden and deepen their activities.

Many first-time planning teams experience similar trends during their process. Called the 'initiating' phase of planning, these teams are creating the foundation upon which future planning and reporting will rest. Their attention is primarily focused on

- defining the school mission or visioning for the upcoming year
- collecting evidence for baseline data (this often includes samples or environmental scans of their school community)
- setting priorities within limits that are manageable within a short time frame
- building commitment to the planning and reporting process

Implementing Phase

Teams in the 'implementing' phase of planning development have already established baseline data related to their planning. Their attention is divided between the previous year's planning and reporting work and the current year's activities. They are often involved in

- refining the school mission or visioning for the upcoming year
- collecting evidence related to specific priorities on an ongoing basis
- establishing protocols for analyzing the effectiveness of plans, and creating a format for the Community Report
- familiarizing the community with annual Community Reports

Consolidating Phase

The 'consolidating' phase of team planning goes much deeper and more broadly into setting priorities, developing outcomes, establishing indicator categories, and reviewing the results of previous plans to assist in the creation of the current year's planning and reporting. Teams are

- asking essential questions
- using data to support decision making and future planning
- revising plans to establish in-depth, essential baseline data
- reporting baseline and results data to the community, using an established format

Renewal Phase

The final stage in team planning is known as the 'renewal' stage. The keynote to this stage is a focus on

- renewing vision statements for future activities
- enhancing effective processes and refining tools for positive change
- supporting and mentoring new team members and other teams in planning and reporting
- reporting results data in an established format that has become familiar to the community

It is important to note that as the planning and reporting process becomes more developed over time, the communities to whom the schools report also become more familiar with the process and anticipate the style and type of communication contained within the annual Community Report.

Figure 2 (on page 1.9) provides a visual representation of the planning process at its earliest stages. Key questions that steer the planning committee towards essential priorities, outcomes, activities, and evaluation are included in the figure, as are the reporting aspects of the process.

Developing Priorities, Outcomes, and Strategies

Developing Priorities and Outcomes

The planning team, with support from subcommittees and an organizational leader, establishes priorities, which essentially are broad outcome statements such as "an improved school climate" or "greater parental involvement." The team also develops specific outcomes that detail the exact components of each priority and the strategies to be used to achieve the outcomes by identified target dates.

Priorities and outcomes reflect the school's mission statement, and link to divisional/district and departmental priorities. They are also based on the data that were collected and analyzed during the development of the vision statement.

A well-written outcome communicates the same intended outcome to everyone who reads it. Each outcome specifies

- who will be affected
- what is to be learned or accomplished
- when it will be learned or accomplished
- how it will be measured or observed

Similar to individual planning and classroom-based planning, some outcomes will have long-term schedules and some will have short timelines. In general, long-term outcomes for schools and divisions/districts are stated in three- to five-year terms, and short-term outcomes are stated in terms from several months to a year or less. Whereas some outcomes may be new for a school, others may be ongoing. Remember, schedules for outcomes may be multi-year, but reporting is done annually. Regardless of the type of outcome, each is written in specific, measurable (observable), achievable, relevant, and time-related (SMART) terms. Using the SMART strategy from the inception of planning to the completion of reporting helps to focus the process. **Priorities and outcomes should focus on changes over which the school community has control.**

Below are two examples of short-term outcomes with differing degrees of detail, using the SMART format.

- By the end of June 20--, the school will have developed a school code of conduct that incorporates positive behavioural management.
- By the end of June 20--, at least 80 percent of the girls in Grade 7 will have mastered the essential mathematics learning for their grade level. Year-end grades of 70 percent or higher will be used as evidence that the outcome has been reached.

SMART Outcomes

Specific
Data are only as good as the questions being asked. Outcomes are stated as *specifically* as possible to increase the certainty that efforts are successful.

Measurable (observable)
Ensure outcomes are defined in a clear and measurable (observable) fashion. How can the school evaluate what it is looking to achieve?

Achievable
Ask: "Is this outcome realistic? Is it feasible to *achieve* it in a given amount of time?"

Relevant
Improvement requires a constant conversation with the community. Ensure the outcomes/priorities are *relevant* to all education partners. Ask: "Does the outcome address what needs to be learned/accomplished?"

Time-related
When will the outcome be accomplished?

It is easy to misconstrue SMART format outcomes as necessarily quantitative outcomes. There are two main schools of thought when it comes to outcome development and data collection.

"It is the choice of indicators and the quality of their expression which then determines the success of both the implementation and evaluation of our targets."

Ruth Sutton

One school of thought contends that unless outcomes are quantitative in nature, they are neither valid nor reliable. People adhering to this school of thought tend to discount qualitative and intuitive data and prefer to count the number of occurrences of a certain indicator and check for change. They tend to have more faith in statistical measures and quantifiable comparisons.

The other school of thought views statistics and quantitative measures skeptically. The people adhering to this school of thought worry about the misuse of data, particularly numbers related to test scores, averages, or quantifiable comparisons.

The debate over qualitative and intuitive versus quantitative measures in outcomes will undoubtedly persist. Alleviating the concerns of both schools of thought is a simple matter. Creating a balance of qualitative, intuitive, and quantitative measures in outcomes and indicators, and focusing on the data rather than the method of collecting the data, helps immensely. The tables on pages 2.17–2.19 list a variety of types of data to assist schools in balancing their data sources.

Combine qualitative, quantitative, and intuitive data to create balanced information.

For instance, if one school outcome focuses on reducing the incidents of bullying on the playground, a combination of qualitative and quantitative measures could be used:

- disciplinary reports (number increasing/decreasing = quantitative; severity of incident = qualitative)
- playground atmosphere (number of students surveyed indicating feelings of safety = quantitative; playground observations = qualitative)

Using data to inform the inquiry process improves schools.

Remember, it is the use of data and not the data sources themselves that are subject to misuse. Using data as motivation results in distortion and distrust. Using data to inform the inquiry process improves schools. It is the process of reflecting on specific data in a meaningful, logical way that allows for data-informed decision making and responsible planning.
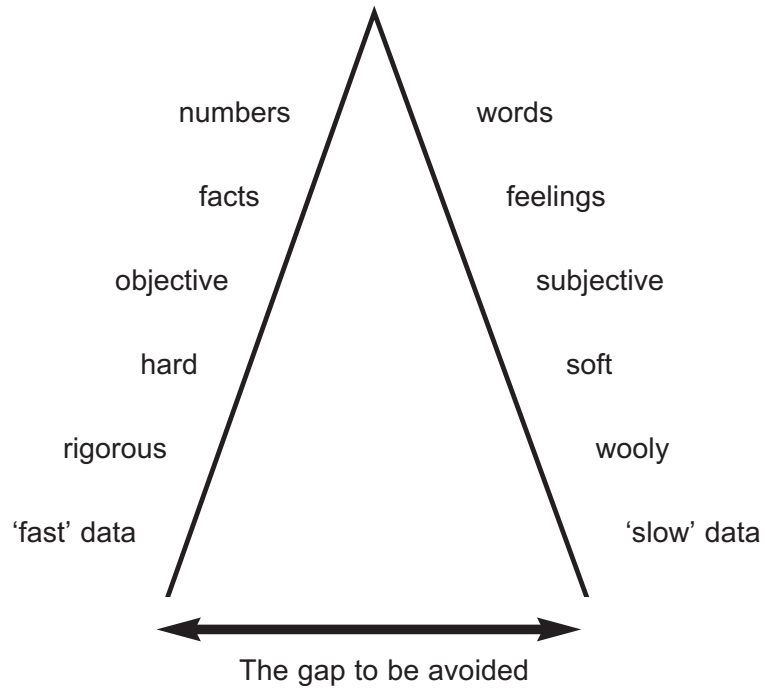
Figure 4: Balancing Qualitative and Quantitative Indicators and Data

numbers	words
facts	feelings
objective	subjective
hard	soft
rigorous	wooly
'fast' data	'slow' data

The gap to be avoided

Figure 4: Adapted from Sutton, R. *School Self Review: A Practical Approach.* Salford, UK: RS Publications, 1995.

Identifying Data Sources and Indicator Categories

Indicator Categories

Indicator categories are broad groupings of information that enable schools to measure the success of a program/initiative in meeting outcomes.

Some examples of common indicator categories include

- Student Graduation/Program Completion
- Student Achievement/Expectations
- School Climate
- Student Engagement
- Curriculum
- Parental Involvement
- School Leadership
- Student Services

While developing outcomes for a school plan, the planning team considers how the outcomes link to priorities and how to determine whether the outcomes have been achieved.

Indicator categories are the first step toward identifying outcomes for improvement. Four samples are illustrated in the chart on the following page.

Start by creating the indicator category.

Ask: "What are the general areas in which change will occur?"

Indicators are observable and measurable signposts that show progress in outcome achievement.

Next, identify the more specific indicators. Ask: "What specific components of the general area will be affected?"

Indicators are observable changes or indications that change is occurring. To be most helpful, indicators must be specifically linked to the outcomes. The outcome will provide very specific descriptions that allow (intuitive, qualitative, or quantitative) measurement of results. Using the SMART technique for both indicators and outcomes is useful.

Table 1: Preparation for Identifying Indicators

Identified Area of Improvement	Indicator Categories for Current Year
"Improve reading skills"	• Increased vocabulary • Recognizing main idea • Drawing conclusions • Making inferences • Decoding new words
"Improve analytical thinking skills"	• Increased complex problem solving • Evidence of gathering information • Organizing information • Generating ideas • Synthesizing elements • Evaluating outcomes
"Improve school climate"	• Increased trust between families/students and school • Reduced number of threats/harassment • Increased number of families/students at school events • More students involved in co-curricular activities
"Increase inclusion of students with special needs"	• Improved differentiation of instruction at the classroom level • Increased use of Classroom Profiles • Strategic and timely placement of Educational Assistants • Collaborative review and creation of Individualized Educational Plans (IEPs) • Timely meetings with parents to create IEPs
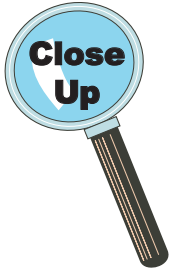
Tip: Planning should occur with evaluation in mind.

A team should not wait until it has finished the School Plan to think about evaluation. If evaluation strategies are built into the plan early, the team will have a better appreciation of the effectiveness of programming and activities. Evaluation plans need not be elaborate; however, they should ensure that a variety of information sources are used to obtain various types of information about the strengths and weaknesses of new and established programming and activities.

The two tables on the following pages offer a wide array of data sources that assist in outcome-based planning.

Table 1: Adapted with permission of Quality Leadership by Design, LLC (2001).

Types of Data

Student Learning

Performance Assessments

- Portfolios
- Exhibitions
- Report cards
- Course enrolments
- Promotion/retention rates
- Graduation/drop-out rates
- Credit acquisition
- Post-secondary activity (graduation follow-up)

Test Results

- Teacher-made
- Standardized (commercial)
- Provincial standards tests
- Divisional tests

Demographic

- Attendance patterns
- Graduation/drop-out rates
- Student migrancy
- Exit surveys (for non-completers)
- Vandalism
- Community/student/staff/parental involvement
- Discipline incidents
- Staff mobility

Process

Professional Development

- Participation rates
- Topics
- Frequency
- Level of implementation

School Organization

- Class size/pupil-teacher ratio
- Scheduling
- Behaviour codes
- Support services
- Community/student/staff/parent involvement
- Communications
- Facilities/technology

Curriculum/Instruction/Assessment

- Variety of instructional strategies and assessments
- Differentiated instruction
- Inclusion/special-needs accommodations
- Consistency across grade levels
- Curriculum expectations

Resources

- Decision-making for allocation, distribution across grades/subjects, variety

Staff

- Experience, qualification, certification

Perceptual

Student Attitudes/Satisfaction

Parent Attitudes/Satisfaction

Staff Attitudes/Satisfaction

Community Attitudes/Satisfaction

- Surveys
- Interviews
- Focus groups
- Comments/discussions
- Newspapers/newsletters
- Community reports

Progress on School/Division Priorities

Indicators and outcomes as specified in the existing plan

Tip: Monitor progress on outcome results regularly throughout the year to allow for necessary plan adjustments.

Types of Data: Adapted with permission from MSIP Development Phase Training: *From Data to Action – Session III.*

Data to Support School Improvement

| Framework (indicators)	Data

Focus on Student Learning, Curriculum, and Instruction
 	
Students
• Successfully complete courses
• Graduate
• Participate in school activities
• Feel connected to and supported by teachers
• Are interested in what they are learning
• See what they are learning as relevant
• Are motivated to learn and proud of accomplishments
 	
Teachers
• Use a variety of instructional and assessment strategies
• Differentiate instruction
• Believe all students can learn and be successful
 	
Reach out…to mobilize involvement
 	
Staff and Students
• Believe students have a voice in school decisions that affect their learning or their lives
 	
Teachers
• Believe students have a voice in school decisions that affect their learning
• Are committed to school improvement
• Enjoy their work
 	
Parents/Guardians
• Believe they have a voice in school decisions that affect their children
  Examples:
  — All constituent groups are actively involved in school improvement initiatives
  — Staff identify a range of people/groups involved in leadership activities
  — The school has formed partnerships or alliances with the community
 	
Look in…to build internal capacity
• Data are collected from multiple sources and used in planning
• Specific times are set aside for reflection and planning
• School vision or mission, priorities, and outcomes are clearly articulated and coherent
• Teachers actively support the identified priorities and outcomes
• All constituent groups believe the atmosphere is conducive to learning
• Teachers work together on a variety of levels
• Teachers indicate they are interested in new ideas and in learning new processes
• Professional development opportunities related to the school priorities and outcomes are built into the school plan
	Student Learning
	• Is how students are performing at any point in time
	• Communicates the degree to which students have acquired specific knowledge, skills and attitudes
	• Is measurable
	  Examples:
	  — Test results: teacher/school/division/provincial
	  — Performance assessments: portfolios, exhibitions, report cards, graduation rates, credit acquisition
	
	Demographic
	• Provides understanding of students and their unique needs
	• Identifies factors to be considered when making decisions about classroom/school/division priorities
	  Examples:
	  — Attendance patterns, graduation/drop-out rates, parental involvement, external agency involvements
	
	Process
	• Information related to the school/division's efforts to enhance student achievement
	• Helps staff form decisions re: curriculum, instruction, assessment
	• Information related to the school/division planning processes
	  Examples:
	  — PD: participation rates, levels of implementation
	  — School organization: class size, behaviour codes, community involvement, student/parent involvement
	  — Curriculum/instruction/assessment: differentiated instruction, inclusion/special needs accommodations
	  — Resources: allocations
	  — Staff: experience, qualifications, certification
	
	Perceptual
	• What students, teachers, parents and the community think about the school/division
	  Examples:
	  — Surveys, interviews, focus groups

Measurement Instruments and Data Collection

After identifying and agreeing upon the appropriate data sources, it is time to select or create the measures needed.

Remember: Most (if not all) of the information required will likely come from existing measures and data.

Common Forms of Instruments
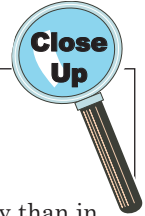
Questionnaires

Advantages

- Several aspects of the program on one measure can be probed
- Candid, anonymous comments and suggestions can be collected if space is provided for comments
- Questions are standardized for all respondents
- Questions can be designed as selected response for quick, machine scoring
- Respondents are given time to think

Limitations

- Not as flexible as interviews
- People often express themselves better orally than in writing
- Responding is often tedious and people forget to return questionnaires
- People may give "socially desirable" responses
- Literacy is required
- Depth of information sometimes sacrificed for breadth

Interviews

Advantages

- Can be done by phone at times that are convenient to respondents
- People who can't read or write are able to answer
- Can be conducted in respondents' native language
- Flexibility allows for unanticipated lines of query
- Allows for depth; responses can be probed
- Persistence can yield high return rates

Limitations

- Time-consuming; costly
- Possible for interviewer to (consciously or unconsciously) influence responses
- People may give "socially desirable" responses

Observations

Advantages

- Can use required observation (such as teacher evaluation) for other purposes
- Observers can see what teachers or others actually do, not what they say they do

Limitations

- Time is needed to develop observation, to measure and train observers
- Presence of observers may influence classroom behaviour
- Time needed to conduct a sufficient number of observations
- Scheduling problems

Performances
(e.g., essays, demonstrations, projects, performances [music, dance, drama, speech, et cetera])

Advantages

- Provide actual sample of student work
- Can provide "diagnostic" information about student performance and about instruction
- Available for all subjects (unlike standardized tests)
- Credible method for assessing complex skills and processes
- Contextualized and relevant to real-life situations

Limitations

- Criteria for judging must reflect subject matter standards, and yet be understandable and usable by all
- Many samples are needed to draw conclusions about one individual; classrooms/school inferences require fewer samples
- Scoring process is time-consuming
- Finding scorers may be difficult given the time commitment to training and scoring

Close Up
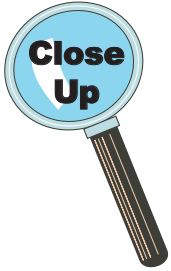
"Start small, don't overwhelm staff with a 'data dump.'"

Brian Benzel,
Superintendent,
Spokane WA

Table 2: A Guide to Data Sources

Objective	Appropriate Types of Data Sources
Analyze/assess system health and capacity	• Surveys; student behavioural indicators; graduate follow-ups; rates of participation in specific courses; provincial standards test data over time
Make curricular and instructional modifications at the individual/classroom/grade level	• Customized, teacher-developed assessments; district, school, and grade-level rubrics; performance tasks; observations; grades; resource teacher, counsellor/clincian reports; unit quizzes/tests; interviews; portfolios
Make resource allocation decisions	• Surveys; grades; retention/success patterns; program evaluations; clinical reports; IEP/BIP evaluations; teacher observation sheets
Focus on the needs of a specific targeted group of learners	• Surveys; grades; retention/success patterns; program evaluations; resource teacher/counsellor/clinician reports; teacher observation sheets
Target staff development	• Strategic plan; school goals; School Plan indicators; trend analysis; surveys
Make improvements that affect individual student learning	• Customized, teacher-developed strategies; division/school/grade-level rubrics; performance tasks; observations; grades; unit quizzes and tests; running records; written and oral retellings; portfolios; interviews

Table 2: Adapted with permission of Quality Leadership by Design, LLC (2001).

Close Up
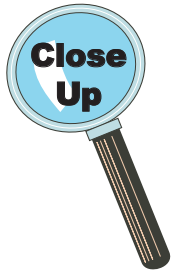
Case Study: Golden Prairie School

February 20: Principal Miller coordinated the planning process by forming a school planning team. He invited 10 people to participate. Eight people agreed to join the planning team: two teachers, one advisory council member, one member of the Chamber of Commerce, the student council president, the principal, one school trustee, and one parent.

March 10: Professional Development Mini-Session Topic: Developing Priorities, Outcomes, and Strategies for Effective School Planning. Following the session, staff created priorities, outcomes, and strategies for the upcoming Annual School Plan for Golden Prairie School.

Focus: Preparation (visioning and identifying needs)

April 2: The planning team met to decide how many times they would meet, what responsibilities there would be, and when the planning team would be dissolved. The team wrote a preliminary vision statement to help guide the planning.

The vision statement was:

> *Golden Prairie School is a safe school where all students are part of a caring community focused on the pursuit of excellence and good citizenship.*

April 3: At a staff meeting, Principal Miller shared the activities of the planning team and distributed the February priorities, outcomes, and strategies that staff had created. In small groups, the staff refined the ideas and selected key priorities for consideration in the School Plan for next year.

Data Collection and Analysis

"Don't rush headlong down the path to collect data and enforce accountability before bringing on board all the people needed to make the new initiative work. Talk. Listen. Build consensus about what is most important to do. Otherwise, you might find yourself out in front—with no one behind you."

American Association of School Administrators

Collecting and analyzing data from multiple sources outside and within the school helps to determine how well the school is currently functioning and to identify trends and issues that will affect the current and future operation of the school. Data also assist in confirming intuitive knowledge. For instance, sometimes educators 'know' the educational environment has been improved, but there is no evidence to support that knowledge. Data assist schools in providing information that proves that what is thought to be true is in fact true.

Data are information sources. Data do not need to be stacks of papers, print-runs of numbers of similar survey responses, or histograms of trends over time based on historical documents. Data can be something as simple as a compilation of anecdotal comments or a series of recurring comments from parents on student report cards. Too often, people unwittingly complicate simple situations in their attempt to collect and analyze valid data. Below is a sample of complex and simple data-collection techniques for the same indicator category.

Indicator Category	Simple Collection	Complex Collection
School atmosphere	• Positive comments • Advisory council minutes • Staff meeting minutes • Participation rates	• Survey of staff • Survey of students • Discipline reports • Portfolio analysis

Remember, data are merely sources of information. With multiple sources and types of data, it is easier to get a clearer perspective of any given situation. The figure below illustrates general categories of data.
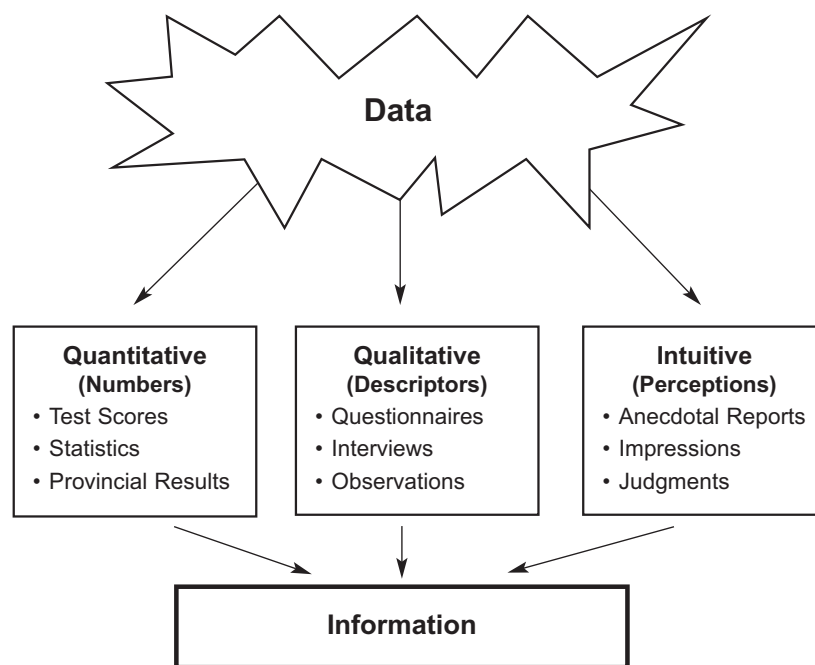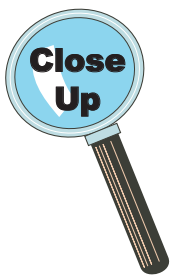
Figure 5: Moving from Data to Information

Figure 5: Adapted with permission of Quality Leadership by Design, LLC (2001).

A needs assessment is a systematic process of collecting and appraising facts and opinions.

As good planning is guided by sound, meaningful information, conducting a needs assessment early in the planning process is also a worthwhile activity. A needs assessment is a systematic process of collecting and appraising facts and opinions and developing consensus about a school's current situation. It helps the planning team to identify gaps between current and required or desired results, to rate these gaps in order of priority, and to identify those that are most important. Such gaps could potentially be identified in areas of professional development, student behaviour, or student achievement.

A needs assessment can rely on various types of easily attainable information, including

- school records and administrative information (e.g., student attendance and student retention and graduation rates)
- student achievement data (e.g., student portfolios and test scores)
- staff, student, and parental attitudes and opinions obtained by surveys or focus groups

Close Up
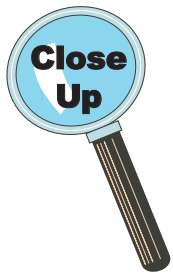
Case Study: Golden Prairie School

April 28: The planning committee met to consider the combined suggestions for priorities, outcomes, and strategies. It recorded selections for pre-existing as well as new data sources that were required for the priorities.

One of the priorities from the September meeting (i.e., "reduce incidence of bullying") was too vague and needed to be linked to departmental and divisional priorities. They wanted outcomes to be in the SMART format. By the end of the meeting, the committee had reconfigured the priority, outcome, and strategy.

Original priority: Reduce incidence of bullying

Revised priority: Link policy and practice to research and evidence

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Original outcome: Bullying on the playground will decrease.

Revised outcome: By the end of June 2004, 75 percent of all students in Grades 3–6 will demonstrate 75 percent of the skills and outcomes in *Steps to Respect: A Bullying Prevention Program*.

Original strategy: Teach students about anti-bullying through the *Steps to Respect* program.

Revised strategy: Teachers will review and plan the lessons in the *Steps to Respect* program at the September staff meeting. Grades 3–6 classroom teachers will teach the program outcomes to classes for two periods per six-day cycle until the conclusion of the program, and 'refresher lessons' will occur intermittently throughout the year.

Focus: Identifying Data Sources and Data Collection

Data Analysis and Decision Making

Begin by having "data discussions" with your planning team. It is always more effective to involve others in analyzing data.

Next, organize data by outcome. The table below shows one way to align data with outcomes.

Look across data sources for any interesting trends, similarities, and/or differences. Try to compare results with a similar group or an appropriate norm group.

Comparing data to show evidence of trends can be misleading. Ensure that the patterns observed are patterns that link directly to previously identified variables.

In other words, use caution. Remember that data without context can be misleading.

Table 3: Data Organized by Outcomes

Outcome—Example 1	Data—Example 1
We want to establish a baseline for our students with respect to reading comprehension and reading skills, then next year we will begin to gauge which student reading levels have increased.	1. Samples of student test results 2. Student transcripts 3. Student report cards
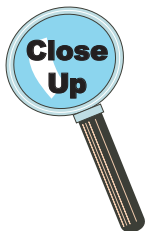
Examples of Commonly Available Data Sources

General Information about Students

- Enrolment records (enrolments, transfers, and dropouts)
- Daily attendance records
- Student records (demographics, extracurricular activities)
- Transcripts (course enrolments and levels, credits earned, grades)
- Student portfolios
- Standards tests results
- Exit exams
- Counselling activity reports (e.g., bullying programs, anger management programs)
- Disciplinary action reports
- Employer evaluations (co-op placements)
- Student survey results
- Post-secondary enrolment

General Information about Teachers or Administrators

- Teacher certification levels, staff development activities, continuing education credits
- Retention levels
- In-service reports

School-Level Information

- Funds/expenditures per pupil
- Reports prepared for or by the district
- Partnerships with post-secondary institutions/businesses/other
- Drop-out/retention and completion rates
- Student-faculty ratios
- Number of students
- Students using IEPs and requiring adaptations
- Variety of adaptations and IEP meeting outcomes

Department Level

- Provincial outcomes report
- Literacy and numeracy report

National Level

- Statistics Canada (PISA, YITS, EDI, NLSCY)

Parent and Community Involvement

- Surveys (of teachers, students, parents, employers, community members)
- Interviews and/or focus groups
- Information to/from parents
- Teacher observations/checklists
- Teachers/student logs/diaries
- Records/logs of contacts (to parents to introduce teacher, to update on student progress, meetings with parents, et cetera)
- Record of obtaining language translators when required
- Record of parent volunteers
- Homework website use
- Attendance sheets for decision-making meetings
- Information provided to families about community services
- Record of service to community by students
- Alternative assessments

Close Up
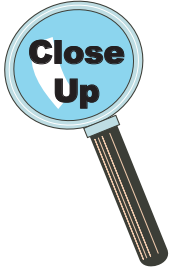
Case Study: Golden Prairie School

At the May meeting of the planning team, the group began compiling the information categories for the Annual School Plan.

The team collected the school mission statement, the school profile, the school budget, and the school priorities. Analysis of data regarding the four school priorities and their outcomes began.

Preliminary discussions were held on what the data meant in terms of next steps and how to report results. Part of the conversation revolved around which parts of the data might be of interest to parents for the Community Report that would be upcoming and which parts of the data held a high enough profile to be considered for the School Planning Report, which was also upcoming. The discussion also included decisions on how to report results,

particularly if they were not as positive as predicted in the original plan. The outcome on the bullying program was the most contentious.

Data analysis from the previous year showed an escalation in violence, including incidents of bullying. The planning team was concerned that if bullying persisted despite the new program, the parents might form a negative opinion towards the school and its ability to keep students safe.

The planning team decided that the bullying prevention outcome was clearly legitimate and, regardless of the results of the program, the act of addressing the issue and working with students to create a safer environment should be the focus, not worrying over "numbers" or a report that drives decision making instead of educational need.

Outcome	Data Sources
By the end of June 20--, 75 percent of all students in Grades 3–6 will demonstrate 75 percent of the skills and outcomes in *Steps to Respect: A Bullying Prevention Program.*	1. Student observation sheets from recess activities 2. Disciplinary records/incident reports 3. Teacher checklists of classroom behaviour 4. Completion of bullying program by all Grades 3–6 classroom teachers

Focus: Data Analysis and Decision Making

Further Reading

Holcomb, Edie L. *Asking the Right Questions: Techniques for Collaboration and School Change*, 2nd ed. Thousand Oaks, CA: Corwin Press Inc., 2001.

United Way of America. *Measuring Program Outcomes: A Practical Approach.* New York, NY: Outcome Measurement Resource Network, 1996. Available online at: <http://national.unitedway.org/outcomes>.