REPORT ON
LONDON REGION MISA PNC

Board
Improvement
Planning Project

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We would like to express our deepest appreciation to the school boards in the London region MISA PNC as well as to the Ministry of Education. It was with their commitment and openness that this project was possible. Participating school boards as well as Ministry representatives were sincere in their discussions on improvement planning, including their strengths, challenges, and areas in need of improvement. Board and Ministry representatives were reflective and insightful. These frank and honest conversations helped to create a valuable and relevant project.

We would also like to thank the project sub-committee, Steve Killip, Sally Landon, and Vince Trocchi, whose knowledge and guidance was instrumental in forming the project as it is today. Without their support and direction, we would not have been able to navigate as we did through this exciting work.

Ann McKerlie & Annemarie Petrasek
Project Consultants

In addition, a thank you to the London region MISA PNC for committing to this project. This work has produced important insights that can be shared provincially in order to support improvement planning.

Design by Ashley Iutzi

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EXECUTIVE SUMMARY

In October 2011, the London Region Managing Information for Student Achievement (MISA) Professional Network Centre (PNC) commissioned a project to support boards in their region with Board Improvement Planning for Student Achievement (BIPSA). Two consultants, Ann McKerlie and Annemarie Petrasek, were approached by the project sub-committee to work on the project. The project sub-committee consisted of Steve Killip (TVDSB), Sally Landon (GEDSB), and Vince Trocchi (HPCDSB).

Six project components were completed	
A literature review on improvement planning in both the educational sector and other relevant public and private organizations.	Specific, hands on consultation to local board improvement planning teams based on the project information collected as well as the literature.
Scheduled visits and consultations with board teams to develop an understanding and summary of the significant issues in developing, implementing and monitoring improvement planning in their boards.	The development of a toolkit to be used as a resource for boards as they work through the process of improvement planning.
A synthesis of plans and literature – where are the key strengths, challenges, and gaps that exist for boards.	Resource materials shared with Ministry representatives in an effort to better improve provincial practices.

Methodology

In order to support boards, a review of the literature was conducted. The focus was on literature that addressed improvement in both the educational sector and other relevant public and private organizations. In order to gather information on the current process of board improvement planning across the London region, initial visits were conducted with the school boards that chose to participate in the project from November 2011 to January 2012. Thirteen of the sixteen school boards in the London region participated. Visits lasted for approximately one to two hours and were held at the participating school boards' offices. The two project consultants conducted these visits. The majority of the initial visits were recorded in order to ensure the accuracy of the information collected. All recordings were only listened to by the lead consultant, who transcribed and collated the information for analysis.

Twelve of these school boards participated in the project summary visits. These visits were conducted from March 2012 to June 2012 and lasted for approximately one to three hours at participating school boards' offices. The two project consultants conducted these visits. Each participating board was presented with a summary of the project findings as well as recommendations and resources that were customized to address each board's needs. Board-specific information was considered to be the property of the school board, and no board-specific information was shared by project consultants outside of the summary visits.

As well, both initial and summary visits were conducted with participants from the Ministry of Education. During the second visit, a summary of the project findings was presented as well as overall project recommendations for the Ministry to consider.

Ethical concerns were explored prior to all fieldwork being conducted. The question guide that was used for the initial visits is included within this report (Appendix A). The two project consultants worked with and consulted the London Region MISA PNC sub-committee on a regular basis throughout the project.

In order to continue to support boards with improvement planning, a project toolkit was created on the London Region MISA PNC website. In its' preliminary stage, it includes the most recent versions of the BIPSAs as received from participating boards where permission was granted. During the 2012-2013 school year, the project toolkit will continue to grow with resources that boards can use to assist with improvement planning.

Findings: Literature Review

The focus of the literature review was improvement planning, both in the private and public sectors, with a focus in education for public sector planning. It summarizes the literature on improvement planning, highlighting the most commonly explored topics. Planning, implementation, and monitoring are the universal components of improvement planning. Planning includes the needs assessment, inquiry process, and SMART goals. Implementation includes research-based strategies, design, professional learning, and parental engagement. Monitoring includes planning, frequency, and measuring progress (White, 2007). Improvement planning is described as both a structure and a process with two goals; student achievement and capacity building. The focus is on learning, at all levels (Stoll, Fink, and Earl, 2003).

Effective Improvement Planning: There are many discussions in the literature as to what effective improvement planning includes. Improvement planning is described as a *"continuous and cyclical process of analysis, planning and implementation"* (EQAO Guide to School and Board Improvement Planning, 2005, pp.4), which is focused on positively affecting student achievement and growth over time (EQAO Guide to School and Board Improvement Planning, 2005). Refer to the full literature review in this report for a discussion of effective improvement planning as well as a list of what improvement planning is not.

Improvement Planning Outside of Education: When exploring improvement planning in the private sector, there are some marked characteristics. Namely, the structure and continual reassessment of improvement planning are well thought out pieces (for example, see Tokio Marine & Nichido Fire Insurance Co., Ltd., 2009). The plan-do-check-act cycle is quite popular in planning processes outside of education (New York State Office of Mental Health, 2005). The specific logistics are very clear in the structure of many private sector improvement plans and a different language is used in plans outside of education. Refer to the full literature review in this report for further discussion.
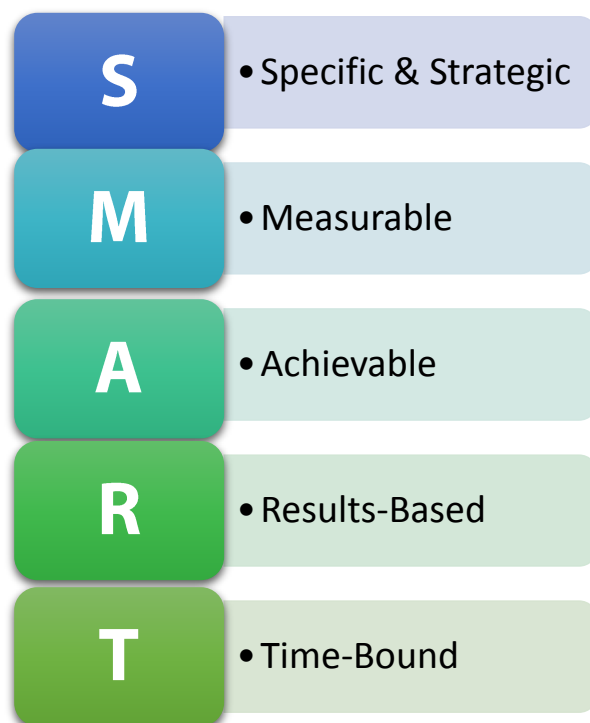
Narrowing the Focus: A commonly held misconception in education is that something is not important unless it can be found in the improvement plan (Katz, 2008). *In setting priorities, improvement planning should focus on the most urgent learning needs of students.* This does not mean that the focus is the only concern for the system. As well, school leaders should be able to articulate how the best available evidence has influenced their thinking. If this is not possible, then the board is in a period of stagnation. Only when school leaders can articulate how their thinking has changed can changes to teaching and learning be made at the classroom level (Reeves, 2012a).

Needs Assessment & SMART Goals: Effective improvement planning begins with a comprehensive needs assessment. Whether at the school or system level, staff should be engaging in a step by step process to conduct a needs assessment. Two relevant pieces when conducting a comprehensive needs assessment are the school self-assessment (for school level improvement planning) and district reviews. In improvement planning, it is important to focus on a small number of SMART goals. This makes the plan both manageable and realistic. It is often the case, however, that SMART goals are not actually "SMART."Refer to the full literature review in this report for further discussion.

Data: In education, EQAO is often the primary piece of data used in the improvement planning process. EQAO (2005) recommends, however, that the data is examined in the context of other data. For example, other data may include demographic information, classroom assessments, report cards, perceptual information, etc. Many different types of data should be used to support the improvement planning process (Reeves, 2011;

Gregory and Kuzmich, 2004). There is always a story behind data, and this is important to capture. Qualitative data can be rich in telling this story (Reeves, 2012b).

Once data is gathered, the review phase should begin. This involves identifying patterns, trends, and areas for improvement based on the data collected. It is important that many people involved in the process are trained in interpreting data and in strategic planning (Reeves, 2011). There are various resources available to support educators in becoming more comfortable working with data and to provide tools for use by improvement planning teams (for examples, see Earl and Katz, 2006; Holcomb, 2002).

S	• Specific & Strategic
M	• Measurable
A	• Achievable
R	• Results-Based
T	• Time-Bound

Process: It is valuable for professionals in any field to regularly assess their practice, highlighting strengths and areas to improve quality. A consistent process of reflection and evaluation can be achieved through the self-assessment process. The most valuable reflections are gathered from within, not from outside of any organization. Many educational policies around the world describe the classroom as a "black box" (Black and Wiliam, 1998). It is not clear what happens in this black box. Unless a lens is directed inside the classroom (i.e. black box), significant improvements are impossible. Hargreaves (2005) encourages thinking "outside the box" in order to see improvements and ensure critical thinking.
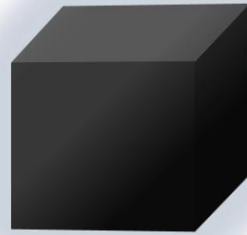
Improvement planning should be an inclusive process where collaboration and equal participation are central (Davies et al., 1992). The members involved should be from all levels of the board, students, and parents/community representation (Education Improvement Commission, 2000; Epstein and Sheldon, 2006; National Network of Partnership Schools at Johns Hopkins University). The most effective schools allow time for frequent collaboration among teachers (Reeves, 2004). An important component of success within a school is teacher leadership. *A culture of shared leadership in improvement planning is absolutely necessary.* It is when real change can be made and student needs are best served (Patterson and Patterson, 2004; Barth, 2001). The literature over the last three decades highlights debate over the best role for principals. Two models, instructional and transformational leadership, have been the focus. Hallinger (2003) concludes that the effectiveness of a leadership model is linked to the external environment as well as the local context of the school / board. The role of the principal is a critical factor that influences school effectiveness (Leithwood and Montgomery, 1982). The Institute for Education Leadership (IEL) recently released the Ontario Leadership Framework (2012) to support leaders (Leithwood 2012). Monitoring of any improvement plan is the key to its success. There are many ways to monitor improvement planning. Leithwood and Aitken (1995) have created a guide which lays out a monitoring system to support schools and boards. This is one example of a process for monitoring.

Process: Catholic and French-Language Context: The majority of improvement planning literature does not make distinctions between public and separate school systems. There are sometimes notes made within documents, however, that indicate readers should consider the differences between the public, Catholic, and French- language boards when using the information provided. Catholic and French-language boards are often encouraged at the beginning of many documents to work within their communities to ensure that their improvement planning includes recognition and consideration of the Catholic faith and French-language respectively (for example, see Education Improvement Commission, 2000). In discussions of Catholic identity and the future of Catholic schools, Heft (1991) discusses the making of generalizations. He encourages that generalizations be made with care and by always acknowledging that there are exceptions to every generalization.

Professional Learning Communities (PLCs)*:* Research indicates that the only way to always improve is to continuously come up with new and better ideas that produce better results. The work of professional learning communities (PLCs) has been summarized by Conzemius and O'Neill (2002). Refer to the full literature review in this report for further discussion. Although rigorous research and evaluation studies on PLCs are limited in number, there is a broad range of publications that discuss guidelines for organizing PLCs and research on their implementation. There is a small but emerging literature that looks critically at PLC models and their impact on teaching practices and student learning. Stoll et al. (2006) have completed a comprehensive review of the literature on PLCs.

Current Provincial Trends in Education: The Ministry has listed many strengths in improvement planning as well as general areas for improvement that they have observed throughout the province. Refer to the full literature review in this report for more details (Literacy and Numeracy Secretariat).

Findings: Overall Summary of Initial Project Visits

Initial visits were completed with thirteen boards in the London region as well as with participants from The Ministry of Education (MOE). This is a summary of the themed analysis of information provided by participants (see Appendix A: Question Guide: Initial School Board Visits for the specific questions asked).

Development of the BIPSA

Many of the boards began the conversation with a historical discussion of the development of the BIPSA within their board. All participating boards considered their current BIPSA process to be more successful than those from previous years. The BIPSA was described by all participants as never being fully complete; it is ***"ever-evolving."*** Most boards and participants from the MOE indicated that ***"staying the course"*** is the current approach taken to BIPSA development, so boards will not make many large-scale changes to their BIPSAs from year to year. The development of School Improvement Plans (SIPs) and BIPSAs was very much described as a ***"process"*** or ***"practice,"*** not an ***"event."***

Most of the boards and participants from the MOE described development of the BIPSA as beginning in the spring with wide consultation, conversation, and discussion focused on board data. They emphasized that starting early is a benefit to the development process. Although not the case in all boards, the BIPSA is usually not finalized until the end of August / beginning of September when EQAO data is available.

Many of the boards and participants from the MOE discussed the structures used for the BIPSA documents. In terms of practice, this was the most varied component of the BIPSA process. The School Effectiveness Framework (SEF) is used to varying degrees by the participating boards, most prominently at the school level in SIP development. Participants from the MOE see an increase in the bottom up approach to improvement planning in boards, where SIPs are created and then the BIPSA follows. This is different from the process described by most boards, where the BIPSA is developed (or partially developed), and then the information is sent to schools so they can begin the development of their SIPs.

Implementation of the BIPSA

Overall, boards and participants from the MOE had the least to say about the implementation of the BIPSA. Most did not articulate a well-thought out process for implementation other than describing the process for sharing the document with various stakeholders. During the implementation of the BIPSA, revisions are often made to the document. Many participants described the initial implementation (i.e. communication) of the BIPSA as a common time for revisions to take place. The BIPSA was again described as "ongoing" and "ever-changing." For most boards, no programs / initiatives are implemented within the board that are not written in the plan or related in some way. Other boards, however, indicated that they include only the year's focus in the plan but many other things happen within the board that are not listed in the plan.

Monitoring of the BIPSA

Monitoring often involves a good deal of ongoing conversation and analysis. At the system level, most boards explained that personnel monitor the data that is collected throughout the year. A wide variety of practices are used to monitor the BIPSA, and boards want to know what other boards are doing. Many suggested that there is a need for the *sharing of practices among boards*.

There is the expectation that principals will self-monitor, and that they will also take responsibility for monitoring in their schools. Superintendents play a large role in monitoring through school visits. Some boards have a defined schedule of foci and guiding questions that are used to frame these visits throughout the year, while others follow a less-structured schedule.

Strengths of the BIPSA

Many of the boards and participants from the MOE described alignment of the BIPSAs with the SIPs as strengths. Boards sometimes take specific steps to ensure that alignment exists. For example, in some boards, schools are instructed to integrate at least one BIPSA goal into their SIPs. Collaboration and communication were also highlighted by many boards and participants from the MOE as strengths of the process; everyone has a voice. The BIPSA provides clear expectations for schools, and it is the directional document for all board personnel. With more people involved in the development of the BIPSA, there is more ownership and accountability of the plan. Many boards highlighted that this is especially true with principals at the school level.

Challenges of the BIPSA

There were many challenges described that involve data, including what data to use, why specific data is being collected, the availability of reliable data, system collection of data, and the use of qualitative data. Participants from the MOE noted the importance of the needs assessment in developing precise BIPSAs. Monitoring of the BIPSAs and SIPs is also considered to be an issue by many boards. Boards ask what to monitor, how to monitor, and when to monitor. Many participants explained that leadership can be a challenge in the monitoring process. When reflecting on the entire BIPSA process, time was often discussed as an issue, more specifically the time to fully implement the BIPSA. Inclusion of special education in the BIPSA process is still a challenge for some boards. Although some have included special education colleagues in the BIPSA development process, there is still room for improvement in this area for many boards.

Findings: Summary of Recommendations Provided to Boards (Not Board-Specific)

Recommendations were provided to boards for consideration in their next round of BIPSA development. The recommendations were largely formulated from the challenges that were described by boards during their initial visits. In creating these recommendations, project consultants approached BIPSA planning as very process-oriented, involving lots of conversation, and the need for a critical friend. The recommendations were written with this in mind. The summary visits were an opportunity to discuss the recommendations as well as have a deeper discussion about the material.

The following topics summarize the recommendations that were provided to boards:

Role of Principals: Principals should play an important and prominent role in the improvement planning process, both at the school and board level. It was suggested that some boards focus on increasing *principal ownership* of the school improvement planning process. *Principal networks* are another way to engage principals in improvement planning.

Strategies and Actions: In the strategies/ actions section of improvement planning documents, some boards were advised to consider reviewing / revising in order to make it more specific to system professional learning. As well, discuss ways to include data in the monitoring strategies in order to articulate on the BIPSA best practice that tracks student achievement in relation to strategies / actions.

Use of Data: The use of data in improvement planning is a challenge for many of the boards that participated in the project. In order to address this, some boards were encouraged to have conversations about their data and consider how the data can be used to tell whether effective strategies exist in their BIPSAs.

Working with Qualitative Information: Many of the boards that participated in the project discussed having difficulties working with qualitative information. In order to address this, boards were asked to consider having members of the BIPSA planning team gather qualitative information from teachers about student need / improvement with relation to board projects related to the BIPSA.

Looking for Gaps: In order to see significant increases in student achievement scores, it is necessary to *look for gaps in achievement for certain groups.* In order to increase student achievement scores at the system level, various approaches were provided to boards.

Needs Assessment / Alignment: The needs assessment was described as a challenge by many boards who participated in the project. This challenge was often specific to gathering and understanding what the data means. Many of our suggestions in this area centered around ensuring that all groups (e.g. elementary panel, secondary panel, special education, etc.) and levels within the board *work together* to create the BIPSA. Working on the needs assessment together may also help with alignment in all areas.

System School Alignment: A challenge for some boards is ensuring alignment between the system and schools. A number of recommendations were suggested to assist with this challenge. For example, at the system level, consider analyzing SIPs in relation to the BIPSA for alignment and check SIPs to determine if the goal the school has focused on is actually a real need at that school. Then, facilitate school to school improvement team visits to share school improvement plans and discuss ways to overcome the challenges they face. Another way to improve alignment is to place some responsibility on principals.

Collaboration: Collaboration is key to the success of improvement planning. In order to encourage this, a number of suggestions were provided to boards. For example, consider having senior administrators share SIPs with the program department in order to more fully inform the student achievement aspect of the BIPSA.

Ownership: In some boards, there were challenges around ownership of improvement planning. In order to increase ownership of the SIPs and BIPSA, some boards were asked to consider how they may *bring improvement planning into everyday meetings and conversations.*

Special Education: Many boards are still working to fully integrate special education into the improvement planning process. A number of suggestions were made to address this challenge. For example, some boards were encouraged to consider discussing ways to rethink, remove, and revise strategies / actions on the BIPSA so they will directly impact special education students.

Findings: Summary of Resources Provided to Boards (Not Board-Specific)

To accompany the recommendations, specific resources were provided to boards. These resources addressed particular needs as discussed in the initial board visits and were in addition to the materials available in the project toolkit. As well, during summary visits with boards, there were many instances where the project consultants provided additional resources. The following is a summary of the resources that were provided to boards in advance of the summary visits:

Many of the boards received a BIPSA from another participating board as a resource. BIPSAs served as examples to highlight component parts of board improvement planning such as SMART goals, structure, use of language, document set-up, strategies / actions, monitoring, inclusion of special education, etc.

Another common resource provided to boards was a contact person who had some experience with a specific area of improvement planning. Many topics were addressed, including working with qualitative data, experience with principal network teams, working with special education data, experience with learning fairs, and principal involvement in school improvement planning.

Further resources were suggested if it was determined that they would be useful to boards for improvement planning purposes. Resources were gathered from participating boards as well as from improvement planning literature. These resources focused on a number of areas, including collaborative action research, creating inquiry questions, collaborative learning cultures, process and planning for school improvement planning, assessment and evaluation, data, and leadership.

Often times in the summary visits, questions and/or new discussions were brought up that were not mentioned in the initial visits. As such, it was often beneficial to supply board teams with additional resources. The following is a summary of the resources that were provided to boards as a result of the summary visit discussions:

In addition to the board improvement plans that were brought to the summary visits, it often became apparent that additional plans would be helpful to board teams. Many teams asked for electronic versions of the plans. Plans were provided to address various challenges, including providing examples of short and concise plans, illustrating how special education can be integrated well into an overall plan, and to demonstrate specific strategies / actions.

Contact people were also provided for many areas of concern, including special education, working with qualitative data, explanation of a bottom-up (grassroots) approach, special education, principal capacity and ownership of SIPs, delving deeper into data in the needs assessment, and asking good questions of data.

Board teams also provided suggestions for components in the toolkit and additional resources. These included implementation science, examples of ways qualitative data is used by school boards, examples of assessment calendars, guides that lay out the process for improvement planning, and a discussion of how to measure mental health.

Findings: Discussion of the Importance of Summary Visits

Originally, the summary visits were included as a project component in order to provide participating boards with information in a straightforward way. Since this information included recommendations and resources for boards in improvement planning, these visits were considered to be an opportunity to provide further context and explanation around these pieces as well as to discuss overall project results. It soon became clear, however, that the summary visits were more than just an opportunity to provide boards with project information. These visits spurred very rich discussions about improvement planning that included further questions, suggestions for project next steps, and the sharing of current practices. Many suggestions were provided for the literature review and toolkit components as well. These were unexpected yet extremely valuable contributions to the project.

Next Steps

Consistent with the project focus for 2011-2012, the 2012-2013 project deliverables will aim to continue to support school boards in the London region. The main focus will be the continuous building of the project toolkit, which is currently available on the London region MISA PNC website. Throughout the school year, materials will continue to be collected and posted online.

Project information collected to date will be summarized and distributed to Directors of the sixteen boards in the London region as well as to the Ministry of Education.

A reminder will also be sent that this report will be available on the London Region MISA PNC website.

BACKGROUND

In the spring of 2011, the London Region Managing Information for Student Achievement (MISA) Professional Network Centre (PNC) undertook their planning process for 2011-2012. An idea was presented to the group by some of its members to explore ways to support boards in Board Improvement Planning for Student Achievement (BIPSA). This proposal was passed by the London Region MISA PNC. A sub-committee of three MISA Leaders was created and they developed an approach for moving forward. The project sub-committee consisted of Steve Killip (TVDSB), Sally Landon (GEDSB), and Vince Trocchi (HPCDSB).

In October 2011, the project sub-committee approached Ann McKerlie, an independent consultant, to coordinate the project. Another consultant, Annemarie Petrasek, also was approached by the sub-committee to work on the project. The purpose of this project was to support boards in the London Region with the BIPSA process. A number of project components were proposed in order to do this:

Proposed Project Components	
Conduct a literature review associated with improvement planning in both the educational sector and other relevant public and private organizations.	Provide specific, hands on consultation to local board improvement planning teams based on the project information collected as well as the literature.
Schedule visits and consultations with board teams to develop an understanding and summary of the significant issues in developing, implementing and monitoring improvement plans.	Develop a toolkit that will serve as a resource for boards as they are working through the process of improvement planning.
Conduct a synthesis of plans and literature – where are the key strengths, challenges, and gaps that exist for boards.	Share resource materials with Ministry representatives responsible for supporting the improvement planning process, in an effort to better improve provincial practices.

METHODOLOGY

The purpose of this project was to create materials that school boards can use to assist them in the process of improvement planning. In order to inform the creation of these materials, a review of the literature was conducted. In order to gather information on the current process of improvement planning across the London region, initial visits were conducted with the school boards that chose to participate in the project. Thirteen of the sixteen school boards in the London region participated in the initial visit phase of this project. Twelve of those school boards participated in the summary visit phase. As well, both initial and summary visits were conducted with participants from the Ministry of Education.

Ethical considerations were explored prior to all fieldwork being conducted, such as protocols for the sharing of information collected. The question guide that was used for the initial visits is included within this report (see Appendix A). The two project consultants worked with and consulted the London Region MISA PNC sub-committee throughout the project process. **The following explains the process that was undertaken to collect information for the project.**

Literature Review

At the beginning of this project, a review of the literature was completed. The focus was on literature that addressed improvement in both the educational sector and other relevant public and private organizations. While the majority of the literature was focused in the area of education, other public and private sphere information was also explored. Meta-analyses were consulted wherever possible to synthesize information. The London region MISA PNC sub-committee as well as project participants provided many directions for reviewing the literature as well as useful resources for moving forward.

Initial Project Visits

At the beginning of the project, all sixteen school boards in the London region were contacted to participate. Thirteen of these boards agreed to participate. Initial visits were conducted with each of the participating boards. These visits included various people, including superintendents, assistant superintendents, principals, program coordinators, curriculum coordinators, system coordinators, associate directors of education, learning coordinators, principals, vice-principals, and teachers. Some visits included entire board improvement planning teams, while others included two or three representatives from the larger team.

Prior to the initial visits, the project consultants gathered and examined the most recent versions of the board improvement plans from the individual boards. Initial visits were conducted from November 2011 to January 2012. These visits lasted for approximately one to two hours, and they were held at the participating school boards' offices. The two project consultants conducted these visits. Participants were asked to discuss their improvement planning process, with a focus on development, implementation, and monitoring.

As well, any challenges that boards may be experiencing with the process were discussed (see Appendix A for the list of questions asked during the initial visits). Notes were taken during the meeting by the consultants. The majority of the initial visits also were audio-recorded in order to ensure the accuracy of the information collected. All recordings were only listened to by the lead consultant, who transcribed and collated the information for analysis.

One of the project consultants as well as the project sub-committee attended an initial visit with participants from the Ministry of Education. It was at this meeting where the same questions were asked as at the board initial visits (see Appendix A), although more generally with a focus on their experiences with boards, board plans, and improvement planning across Ontario.

Summary Project Visits

In preparation for the summary visits, the two consultants analyzed the information from the initial visits as well as the board's current BIPSA in order to address particular challenges that were mentioned by boards. Recommendations and resources were compiled for each board individually, and they were largely formulated from the challenges that were described during their initial visit. In creating these recommendations and choosing particular resources, the approach was taken that BIPSA planning is very process-oriented, involves considerable conversation, and the need for a critical friend.

Summary visits were conducted with twelve of the school boards that participated in the initial visits. These visits included various people, including superintendents, assistant superintendents, program coordinators, curriculum coordinators, system coordinators, associate directors of education, learning coordinators, principals, vice-principals, and teachers. Some visits included entire board improvement planning teams, while others included two or three representatives from the larger group. Although the people involved in the summary visits were very similar to those who participated in the initial visits for each board, the structure of the conversation was quite different.

Summary visits were conducted from March 2012 to June 2012. These visits lasted for approximately one to three hours, and were held at the participating school boards' offices. The two project consultants conducted these visits. Each participating board was presented with a summary of the project findings as well as recommendations and resources that were customized to each board. Board-specific information was considered to be the property of the school board, and no board-specific information was shared by project consultants outside of the summary visits.

The two project consultants, as well as the project sub-committee, attended a summary meeting with participants from the Ministry of Education's BIPSA planning team. It was at this meeting where a summary of the project findings was presented as well as overall project recommendations for the Ministry to consider.

The summary visits were an opportunity to discuss the recommendations and resources that were suggested to boards. This conversation was important to provide some context for these items and explain how they may be useful in future improvement planning. It was also an opportunity for the project consultants to provide any clarification needed and / or answer any questions. These discussions often spurred other side conversations, which many times required the consultants to provide additional support in the way of recommendations and / or resources.

Project Toolkit

In order to continue to support boards with improvement planning, a project toolkit was created on the London Region MISA PNC website. In its' preliminary stage, it includes the most recent versions of the BIPSAs as received from participating boards Only board plans, where permission was granted, were posted.

During the 2012-2013 school year, the project toolkit will continue to grow with resources that boards can use to assist them with improvement planning. Topics to include in the toolkit were largely formulated from the feedback received from boards as to their areas of concern and / or interest.

The following is a list of topics that will form the toolkit as it continues to grow.

1. Needs Assessment
a) Gathering and organizing data (examples of what data and why)
b) Analysis and interpretation of data
c) Identification of area(s) of need

2. Measuring Implementation & Impact
a) Measuring implementation (are we doing what we said we would do?)
b) Measuring impact (how well are we doing what we said we would do and how do we know?)
c) Short term and long term

3. SMART goals, targets, and strategies

4. Qualitative Research

5. Research / Inquiry Questions

6. Leadership
a) Teachers
b) Principals
c) Superintendents

7. Communication of the Plan

8. Process

This section sums up the project information collected during the 2011-2012 school year.

Literature Review

The focus of this literature review is improvement planning, both in the private and public sectors, with a focus in education for public sector planning. This review summarizes the literature on improvement planning, highlighting the most commonly explored topics. For more information on any of these topic areas, please refer to the references section at the end of the document.

Planning, implementation, and monitoring are the universal components of improvement planning. Planning includes the needs assessment, inquiry process, and SMART goals. Implementation includes research-based strategies, design, professional learning, and parental engagement. Monitoring includes planning, frequency, and measuring progress (White, 2007). Improvement planning is described as both a structure and a process with two goals; student achievement and capacity building. The focus is on learning, at all levels (Stoll, Fink, and Earl, 2003).

Effective Improvement Planning

There are many discussions in the literature as to what effective improvement planning includes. Improvement planning is described as a "continuous and cyclical process of analysis, planning and implementation" (EQAO Guide to School and Board Improvement Planning, 2005, pp. 4), which is focused on positively affecting student achievement and growth over time (EQAO Guide to School and Board Improvement Planning, 2005).

The following summarizes the key components of effective improvement planning:

Collaborative and inclusive process	Detailed monitoring process	A well-designed plan
Comprehensive needs assessment	Timely revisions as needed	Implementing key strategies
Small number of SMART goals	Evaluating plan effectiveness and identifying lessons learned	Strategies to engage parents / community
Ambitious targets based on external standards and internal measures		Professional learning supports

The literature also discusses what improvement planning is NOT. The following are some examples:

An annual report	A static document	A list of events
A narrative of everything being done		Developed in isolation

(Literacy and Numeracy Secretariat)

Improvement plans that are dynamic and flexible lead to the greatest gains in achievement. As well, having teachers who are actively engaged in successful action research and doing constant corrections to the planning document are also components of effective improvement planning (Reeves, 2004). The research shows that effective improvement plans are simple to administer, speed up implementation and monitoring, and lead to action in the classroom (Reeves, 2006).

Many texts have been written and are used by educators at all levels to guide them in the improvement planning process (for examples, see Reeves, 2006; Schmoker, 1999). There are also documents available that lay out effective improvement planning specific to the school level. Not only do these materials describe the stages of planning, they also often include instruments, checklists, guidelines, sample plans, etc. that may be useful (for example, see Lezotte and Jacoby, 1990). These documents can be useful to boards while determining what their particular process will look like and also for checking to ensure all important components of improvement planning are being addressed within their process.

Improvement Planning Outside of Education

When exploring improvement planning in the private sector, there are some marked characteristics. Namely, the structure and continual reassessment of improvement planning are well thought out pieces. For example, Tokio Marine & Nichido Fire Insurance Co., Ltd. reports back on the progress of the implementation of its Business Improvement Plan every three months. In a particular report, they confirmed that the Company had implemented all 124 improvement measures in the plan and confirmed that improvements have resulted from many of the measures. In order to further enhance the effectiveness of the improvement measures, the plan is to introduce a plan-do-check-act cycle in business operations (Tokio Marine & Nichido Fire Insurance Co., Ltd., 2009). The plan-do-check-act cycle is quite popular in planning processes outside of education (for example, New York State Office of Mental Health, 2005).

The specific logistics are very clear in the structure of many private sector improvement plans. For example, what will be achieved, who is responsible for achieving it, and when it will be completed is often obvious at first glance (Tokio Marine & Nichido Fire Insurance Co., Ltd., 2009).

When compared to improvement planning in education, different language is often used in plans outside of education, whether privately or publicly-based. Improvement plans are often called "quality improvement plans," "service improvement plans" (for example, see New York State Office of Mental Health, 2005), and "learning plans" (College of Nurses of Ontario). The title of the plan is often a clear indicator of its focus (i.e. quality improvement plans focus specifically on quality improvement).
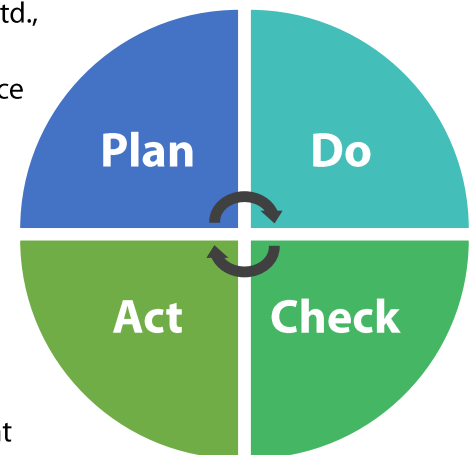
Narrowing the Focus

A commonly held misconception in education is that something is not important if it cannot be found in the improvement plan (Katz, 2008). *In setting priorities, improvement planning should focus on the most urgent learning needs of students.* This does not mean that the focus is the only concern for the system. It is merely the focus of improvement efforts at that time:

> "The research suggests that when professional development efforts are focused on a few key elements, such as improving classroom feedback, assessment practices, and cross-disciplinary non-fiction writing, the yield in student achievement is significantly greater than when professional developers yield to the "flavour of the month" approach in which fads replace effectiveness" (Reeves 2006 in Literacy and Numeracy Secretariat).

Another related misconception is that school boards must receive buy-in from all stakeholders in order to introduce change. While this is the ideal case, it is not absolutely necessary. As well, school leaders should be able to articulate how the best available evidence has influenced their thinking. If this is not possible, then the board is in a period of stagnation. Only when school leaders can articulate how their thinking has changed can changes to teaching and learning be made at the classroom level (Reeves, 2012a).

Needs Assessment & SMART Goals

Effective improvement planning always begins with a comprehensive needs assessment. Whether at the school or system level, staff should be engaging in a number of steps in order to conduct a needs assessment:

Gather and reflect on data	Identify areas in need of improvement
Reflect and celebrate strengths	Identify possible cause and effect scenarios
Determine what is currently working well	Identify a small number of areas to focus improvement efforts

(Literacy and Numeracy Secretariat)

Two relevant pieces when conducting a comprehensive needs assessment are the *school self-assessment* (for school level improvement planning) and *district reviews.* These processes highlight the strengths, areas for improvement, and next steps required, which are all important to consider in improvement planning. Beginning with these documents also fosters reflection and analysis, and it acts as a catalyst for collaborative conversations about improvement (Gregory, Cameron, and Davies, 2000).

In improvement planning, it is important to focus on a small number of SMART goals. This makes the plan both manageable and realistic. It is often the case, however, that SMART goals are not actually "SMART." SMART goals include the following components:

S	• Specific & Strategic - Have you articulated precisely what you want to achieve and have priorities been strategically selected based on a comprehensize needs assessment
M	• Measurable - Are you able to assess/ measure your progress?
A	• Achievable - Is the goal within your reach and within your control? Are targets ambitious yet attainable?
R	• Results-Based - Have established base-line data and targets of where you want to end up?
T	• Time-Bound - What is the deadline for completing your goal?

(Literacy and Numeracy Secretariat)

Data

In education, EQAO is often the primary piece of data used in the improvement planning process. EQAO (2005) recommends, however, that the data be examined in the context of other data. For example, other data may include demographic information, classroom assessments, report cards, perceptual information, etc. *Many different types of data should be used to support the improvement planning process.*

There is more involved in data collection than merely examining provincial test scores (Reeves, 2011). Student data from multiple sources is a very important component of improvement planning (Gregory and Kuzmich, 2004). It is more important to compare data from the same student at different times, rather than year to year classroom data on different students (Reeves, 2004). There is always a story behind the data, and this is important to capture. Qualitative data can be rich in telling this story (Reeves, 2012b).

Once data is gathered, the review phase should begin. This involves identifying patterns, trends, and areas for improvement based on the data collected. It is important that many people involved in the process are trained in interpreting data and in strategic planning. This should include board staff, principals, school teams, teachers, and parents. There is caution necessary in interpreting data (Reeves, 2011). There are various resources available to support educators in becoming more comfortable working with data and to provide tools for use by improvement planning teams (for examples, see Earl and Katz, 2006; Holcomb, 2002).

EQAO (2005) describes an exemplary plan as *including analysis of provincial, board, and school assessment results for both elementary and secondary levels.* As well, the plan *will interpret data through the local context,* focusing on the relationship between target and results, and taking into consideration annual trends. The plan will *also include a communication strategy for sharing results with the community* and demonstrate that a variety of communication tools will be used (e.g. newsletter, school council, websites, etc.).

Process

It is valuable for professionals in any field to regularly assess their practice, highlighting strengths and areas to improve quality. A consistent process of reflection and evaluation can be achieved through the self-assessment process. The most valuable reflections are gathered from within, not from outside of any organization. Many educational policies around the world describe the classroom as a "black box" (Black and Wiliam, 1998). It is not clear what happens in this black box, and "a focus on standards and accountability that ignores the processes of teaching and learning in classrooms will not provide the direction that teachers need in their quest to improve" (Stigler and Hiebert, 1997, pp. 20). Unless a lens is directed inside the classroom (i.e. black box), significant improvements are impossible. Hargreaves (2005) encourages thinking "outside the box" in order to see improvements and ensure critical thinking.
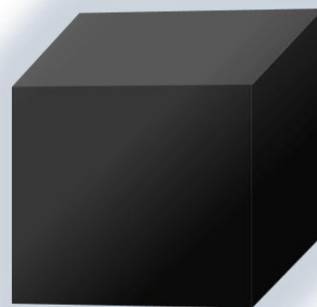
Once areas for improvement have been determined, plans can be made for how to effectively implement changes. ***Questioning how and why certain practices occur is the most effective way to begin to critically examine practice.*** The Guide to the National Quality Standard (2011) provides a set of reflective questions that serve as a good starting point for thinking critically about how and why things are done a certain way while also reflecting on practice to determine effectiveness, relevance, equity and fairness (Australian Children's Education & Care Quality Authority, 2011).

Improvement planning should be an ***inclusive process where collaboration is central.*** The process should be constructed to ensure equal participation and contribution by all involved (Davies et al., 1992). The members involved should be from all levels of the board, students and parents/community representation (Education Improvement Commission, 2000; Epstein and Sheldon, 2006; National Network of Partnership Schools at Johns Hopkins University). The most effective schools allow time for frequent collaboration among teachers (Reeves, 2004). There is research to highlight the successes and gains possible when teachers examine student work collaboratively for improvement planning and professional learning purposes (Little et al., 2003). Many pieces of literature highlight the importance of ensuring all ideas and perspectives are valued. Epstein, Coates, Salinas, Sanders, and Simon (1997) highlight the importance of creating partnerships between school, family, and community. Hallinger and Heck (2010) found significant direct effects of collaborative leadership on change in the academic capacity of schools and indirect effects on individual student achievement. Building capacity within schools can help to improve student learning.

An important component of success within a school is teacher leadership. It is no longer possible for a principal to achieve the necessary successes alone. A ***culture of shared leadership*** in improvement planning is absolutely necessary. It is when real change can be made and student needs are best served (Patterson and Patterson, 2004; Barth, 2001). It is important to build on the existing strengths of teachers. A collaborative community with good communication and collegiality creates a positive environment of learning and leadership (Barth, 1990). Since teacher leadership is not part of a hierarchical structure, however, trust among staff members is absolutely necessary for success.

Without this, conflict can result (Bennett, 2006; Blase and Blase, 1997). Staff turnover can also affect the success of teacher leadership (Burke and Mitchell, 2004).

The successful distribution of leadership is only possible when formal school and district leaders support it (Leithwood et al., 2007). Distributing leadership to teachers may support the building of professional learning communities within and between schools (Harris, 2003), and capacity building should be the focus of this leadership (Stoll, Bolam, and Collarbone, 2002).

Research indicates that collaborative school cultures have been linked with success in improvement planning. When teachers and administrators work together to change their school's culture, successful results follow (Patterson and Rolheiser, 2004). It does not take long to create a collaborative culture, and the *improvement planning process naturally lends itself to collaboration.* Leithwood has described this as "transformational leadership" (Leithwood and Jantzi, 1990; 2005). A four year evaluation of England's National Literacy and Numeracy Strategies indicated that leadership has significant effects on teachers' classroom practices (Leithwood and Jantzi, 2006). Leithwood, Louis, Anderson, and Wahlstrom (2004, pp. 5) argue that "leadership is second only to classroom instruction among all school-related factors that contribute to what students learn at school … [and second,] leadership effects are usually largest where and when they are needed most." The key to the success of an improvement plan is leadership (New York State Office of Mental Health, 2005).

The 90/90/90 School Improvement Process provides intensive support for schools who may be struggling by creating systematic and sustainable change. Through work with schools where more than 90% of students are low income, more than 90% are from minority ethnic or linguistic backgrounds, and more than 90% are meeting/exceeding academic standards, a set of professional practices associated with improved achievement were created. Collaboration and effective teaching and leadership practices build capacity and sustainability. A menu of tools is provided to assist with the process. There are three phases – implementation with commitment, implementation with purpose, and implementation with sustainability (The Leadership and Learning Centre).

The literature over the last three decades highlights debate over the best role for principals. Two models, instructional and transformational leadership, have been the focus. Hallinger (2003) concludes that the effectiveness of a leadership model is linked to the external environment and local context of the school / board. As well, understandings of the two models are always evolving in response to changes in the education system. Although the large body of literature on the importance of the principal as a leader in improvement planning is from the 1980s and 1990s, this is still a widely held concept in current literature. *The role of the principal is a critical factor that influences school effectiveness* (Leithwood and Montgomery, 1982). The Institute for Education Leadership (IEL) recently released the Ontario Leadership Framework (2012) to support leaders (Leithwood, 2012).

Monitoring of any improvement plan is the key to its success. There are many ways to monitor improvement planning. Leithwood and Aitken (1995) have created a guide which lays out a monitoring system to support schools and boards. This is one example of a process for monitoring.
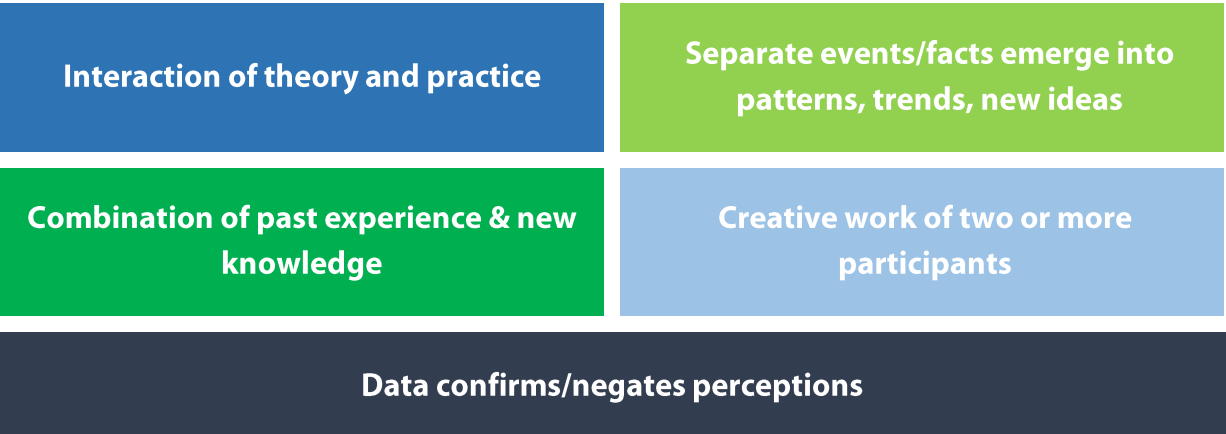
Process: Catholic and French-Language Context

The majority of improvement planning literature does not make distinctions between public and separate school systems. There are sometimes notes made within documents, however, that indicate readers should consider the differences that exist between the public, Catholic, and French-language boards when using the information provided. There are also documents that include components specific to Catholic and French-language boards (for example, see Institute for Education Leadership). Catholic and French-language boards are often encouraged at the beginning of many documents to work within their communities to ensure that their improvement planning includes recognition and consideration of the Catholic faith and French-language respectively (for example, see Education Improvement Commission, 2000).

In discussions of Catholic identity and the future of Catholic schools, Heft (1991) discusses the making of generalizations. He encourages that generalizations be made with care and by always acknowledging that there are exceptions to every generalization.

Professional Learning Communities (PLCs)

Research indicates that the only way to always improve is to continuously come up with new and better ideas that produce better results. The work of professional learning communities (PLCs) can be summarized by Conzemius and O'Neill (2002) in their discussion of what components are necessary for professional learning to happen:

Interaction of theory and practice	**Separate events/facts emerge into patterns, trends, new ideas**
Combination of past experience & new knowledge	**Creative work of two or more participants**
Data confirms/negates perceptions	

Although rigorous research and evaluation studies on PLCs are limited in number, there is a broad range of publications that discuss guidelines for organizing PLCs and research on their implementation. There is a small but emerging literature that looks critically at PLC models and their impact on teaching practices and student learning. In applying business concepts to education, many different features that define a PLC have been identified, including the following – supportive and shared leadership, shared values and vision, collective learning and the application of that learning, shared practice, supportive conditions, mutual trust, inclusive school-wide membership, networks, and partnerships that look beyond the school for sources of learning. Stoll et al. (2006) have completed a comprehensive review of the literature on PLCs.

Current Provincial Trends in Education

The Ministry has listed many strengths in improvement planning to date that they have observed throughout the province. These include the following:

Use of frequent common assessment	Use of technology
Immediate and decisive intervention	Time/opportunity for students to learn
Constructive use of data	Focus on differentiated instruction
Research-based leadership	Use of scoring guides (rubrics) and/ or display of data
Collaboration in developing the plan	

The Ministry has also listed the general areas that require improvement that they have observed throughout the province. These include the following:

Non-specific goals	Evaluation cycles built into plans
Too many initiatives	Timelines lack precision
Needs assessment focused mainly on EQAO (little data on teaching practice, leadership)	Minimal reference to strategies to engage parents
Monitoring strategies either lacking or not time-bound / specific in responsibility	Identify precise research-based strategies
Inquiry needs focused with clear priorities	Capacity building not aligned to implementation of strategies
Tend to be structured as narratives or annual reports (list of everything board is doing)	

(Literacy and Numeracy Secretariat)

Overall Summary of Initial Project Visits

Initial visits were completed with thirteen boards in the London region as well as with participants from The Ministry of Education (MOE). This summary is a themed analysis of the information that these groups provided in the following areas – the development, implementation, and monitoring of BIPSAs as well as the strengths and challenges associated with the process of improvement planning (see Appendix A: Question Guide: Initial School Board Visits for the specific questions asked during the initial visits).

Development of the BIPSA

Many of the boards began the conversation with a historical discussion of the development of the BIPSA within their board. Most described their past processes as involving only a handful of people, the document was too long, and there was little engagement and ownership of the plan throughout the board. One board described their past planning process as more like "putting together a Lego plan than ... [a] comprehensive integrated plan." All participating boards considered their current BIPSA process to be more successful than those from previous years.

The BIPSA was described by all participants as never being fully complete; it is *"ever-evolving."* BIPSAs are more likely to be refined and *"tweaked"* over a number of years instead of going through a complete overhaul. The BIPSA was described as a *"working document,"* a *"living document,"* a *"work in progress,"* and as such there is not a beginning and end to the development process. The process follows a yearly cycle in terms of revisions, although goals can span over a few years - normally about three to four year cycles. Most boards and participants from the MOE indicated that *"staying the course"* is the current approach taken to BIPSA development, so boards will not make many large-scale changes to their BIPSAs from year to year. The development of School Improvement Plans (SIPs) and BIPSAs was very much described as a *"process"* or *"practice,"* not an *"event."* In some boards, there has been an intentional effort to think in this way, in order to improve the BIPSA process. Most of the boards and participants from the MOE described development of the BIPSA as beginning in the spring with wide consultation, conversation, and discussion focused on board data. This is the needs assessment that then is used to determine the goals/strategies. They emphasized that starting early is a benefit to the development process. They agreed that the needs assessment plays a large role in the development of BIPSAs, however, the needs assessment is not always developed in the same way from board to board. While many boards consider the data and create needs assessment documents (using various structures), others have a "rich discussion" and no document is created. EQAO data is often the driving piece of data for these assessments, although many boards discussed other pieces of data that are included in the process. Although not the case in all boards, the BIPSA is usually not finalized until the end of August / beginning of September when EQAO data is available. The BIPSA is due to the MOE by the end of October.

Many of the boards and participants from the MOE discussed the various formats used for BIPSA documents. In terms of practice, this was the most varied component of the BIPSA process. Some boards use formats that align more closely with MOE materials, while others have decided to use a different means for organizing the BIPSA document. Most of these boards described "push back" that they receive from the MOE for using various formats.

This was an area of confusion for some because the MOE always describes the BIPSA as the "board's plan." MOE participants discussed that some of the formats boards use are too long, too short, and do not have all the necessary components. In a couple of cases, BIPSA teams have attempted to use a

different format, and it has been vetoed within their own boards. Many boards have gone through the process of shortening their BIPSA documents, and this is considered an achievement when they are successful. One board explained *that it is easy to get "bogged down" in the "format" of the BIPSA*, and this should not be the focus. Overall, most boards described the resources provided to them by the MOE as "great" and "very useful" for the development of the BIPSA.

The School Effectiveness Framework (SEF) is used to varying degrees by the participating boards, most prominently at the school level in SIP development. Some boards do not use the framework other than to include SEF indicators on their BIPSA and SIPs. Others focus on the framework very deeply, even structuring their entire process around it. Many boards described the SEF self-assessment process as important to their improvement planning process, primarily in the needs assessment and creation of SIPs.

In most of the participating boards, the BIPSA SMART goals are shared with schools in June so principals can start planning their SIPs. There was some disagreement, however, as to the proper use for SMART goals in the improvement planning process. While some boards use SMART goals as the focal point of their plans, others do not think that SMART goals are appropriate at the system level. Instead, they believe that they are most useful at the classroom level with teachers.

Participants from the MOE cautioned that it is important to have specific goals on the BIPSA, and these goals do not necessarily have to be for each of the four plan pillars. Participating boards are divided on this approach. Some boards choose a goal for each of the four pillars, while others use the four pillars as a guide because their goals are based on their needs assessment. Overall, boards do not drastically change their goals every year as time is needed to achieve them. Most boards acknowledged that there is the need for patience and focus over a span of a few years in order to make gains in teacher practice and student achievement.

Participants from the MOE see an increase in the bottom up approach to improvement planning in boards, where SIPs are created and then the BIPSA follows. This is different from the process described in most boards, where the BIPSA is developed (or partially developed), and then the information is sent to schools so they can begin the development of their SIPs.

Implementation of the BIPSA

Overall, boards and participants from the MOE had the least to say about the implementation of the BIPSA. Most did not articulate a well-thought out process for implementation other than describing the process for sharing the document with various stakeholders. In many cases, these discussions began with a description of who the BIPSA was introduced to and how this information was presented. Principals, trustees, senior administrators, and to a lesser extent, teachers and parents were all mentioned as groups who are introduced to the BIPSA. This communication is provided through board-wide email and board meetings. Often, one of the driving forces in implementing the BIPSA is to help schools begin the development of their SIPs.

During the implementation of the BIPSA, revisions are often made to the document. Many participants described the initial implementation (i.e. communication) of the BIPSA as a common time for revisions to take place. The BIPSA was again described as "ongoing" and "ever-changing." The plan is being introduced to stakeholders and often feedback is provided by these groups.

Many boards felt that implementation depended on professional learning and change in teacher practice yet they articulated their difficulty monitoring change in teacher practice. As a result, many boards measure only improvement in student achievement.

For most boards, no programs / initiatives are implemented within the board that are not written in the plan or related in some way. Other boards, however, indicated that they include only the year's focus in the plan but many other things happen within the board that are not included.

Monitoring of the BIPSA

Monitoring often involves a good deal of ongoing conversation and analysis. At the system level, most boards explained that personnel monitor the data that is collected throughout the year. The data monitored can include DRA, teacher perception survey data, student work, etc. A wide variety of practices are used to monitor the BIPSA, and boards want to know what other boards are doing. Many suggested that there is a need for the *sharing of practice among boards.*

There is the expectation that principals will self-monitor, and that they also will take responsibility for monitoring in their schools. Many boards stressed that without principals, the SIP process would be ineffective. Some boards were sympathetic in that they are placing more work on already busy principals, but this is considered to be the only way to monitor effectively at the school level. While a small number of boards added that teachers participate in the monitoring process, this is a goal for many boards moving forward.

Superintendents play a large role in monitoring through school visits. Some boards have a defined schedule of foci and guiding questions that are used to frame these visits throughout the year, while others follow a less-structured schedule. Superintendents participate in walkthroughs, district reviews, looking at student work with principals and school teams, and participating in school team meetings and discussions with principals. Many boards stressed the importance of consistency in superintendent visits in order to effectively monitor.

Many boards and participants from the MOE suggested that it is important for boards to "stay the course" because it takes time to see changes at the system level. As a result, boards are trying to be patient and stay focused in order to see results over the long term.

Strengths of the BIPSA

Many of the boards and participants from the MOE described *alignment* of the BIPSAs with the SIPs as strengths. Boards sometimes take specific steps to ensure that alignment exists. Some of these ways include board goals having a mandatory place in SIPs, thorough monitoring of the SIPs at the board level, and the BIPSA being created out of school-based needs that arise from school needs assessments. In some boards, information from the BIPSA is "almost copied and pasted" into the SIPs. Having a K-12 focus, using the same format for the BIPSA and SIPs, using common language, comfort throughout the board with the improvement planning process, and evidence of SEF indicators were all components that were discussed as assisting with alignment.

Collaboration and communication were highlighted by many boards and participants from the MOE as strengths of the process; everyone has a voice. It is considered a benefit to the process to have as many people involved as possible. The collaborative process was described by many as a "must" for the creation of the BIPSA. Collaboration and communication throughout the board is enhanced

because of the BIPSA process. BIPSAs and SIPs are described as "alive" because they are "working document[s]."

The BIPSA provides clear expectations for schools, and it is the directional document for all board personnel. With more people involved in the development of the BIPSA, there is more ownership and accountability of the plan. Many boards highlighted that this is especially true with principals at the school level.

Challenges of the BIPSA

There were many challenges described that involve ***data***, including what data to use, why specific data is being collected, the availability of reliable data, system collection of data, and the use of qualitative data. Although some boards are using qualitative data in a comfortable and useful way, many boards are grappling with this. Some boards also questioned how to effectively measure teacher practice and how to develop useful research questions.

Participants from the MOE noted the importance of the ***needs assessment*** in developing precise BIPSAs. While boards spoke about the needs assessment as an important piece, some of the MOE participants explained that they do not always see a link between the needs and goals in board plans. Some boards described that they experience challenges completing the needs assessment, mostly as a result of the data issues described above.

Monitoring of the BIPSAs and SIPs also is considered to be an issue by many boards. Boards ask what to monitor, how to monitor, and when to monitor. Many boards use teams in their monitoring, whether network teams, school teams, etc. One board described their network teams as the "best tool for monitoring." Whoever is involved, system monitoring of school level data is a challenge. Participants from the MOE felt that boards do not focus on specific goals and this causes problems with monitoring. Participating boards did not echo this challenge.

Many participants explained that ***leadership*** can be a challenge in the monitoring process. Without good leadership, effective monitoring is impossible. Principals need to be "learning leaders" who learn alongside their staff.

When reflecting on the entire BIPSA process, ***time*** was often discussed as an issue, specifically the time to fully implement the BIPSA. There are also distracters, such as unions, other MOE initiatives, and health and safety discussions, which take up time and prevent a focus on the BIPSA process. In discussions about MOE involvement in the BIPSA process, boards held varying opinions. Some boards explained that MOE visits are unhelpful because no feedback is provided to boards, the MOE is seen to provide "make work projects" for boards that consume resources, and "money drops" are not helpful if they do not coincide with board goals. In the "noise of the day," it is easy to lose focus. Some boards, however, described the MOE visits as "fruitful," helpful in reflecting on the BIPSA process as a whole, providing useful feedback as an "outside observer," and providing a measure of accountability. Some boards suggested that it would be helpful if the MOE worked as a "critical friend," providing feedback and best practices to boards.

Inclusion of special education in the BIPSA process is still a challenge for some boards. Although some have included special education in the development process, there is still considered to be room for improvement in many boards. Intentional discussions have taken place in some boards, trying to ensure that special education is fully integrated into the BIPSA.

Summary of Recommendations Provided to Boards (Not Board-Specific)

Recommendations were provided to boards for consideration in their next round of BIPSA development. The recommendations were largely formulated from the challenges that were described during initial visits. In creating these recommendations, project consultants approached BIPSA planning as very process-oriented, involving lots of conversation, and the need for a critical friend. The recommendations were written with this in mind. The summary visits were an opportunity to discuss the recommendations as well as have a deeper discussion about the material. This conversation was important in providing context for the recommendations. It was also an opportunity for project consultants to provide any clarification needed and/or answer questions from boards.

The following is a summary of the recommendations that were provided to boards.

Role of Principals

Principals should play an important and prominent role in the improvement planning process, both at the school and board level. It was suggested that some boards focus on increasing principal ownership of the school improvement planning process. This can be achieved in a number of ways, including formulating BIPSA SMART goals in the spring so principals can tentatively formulate their SIP SMART goals in June, present a more complete version of the BIPSA at the August principal's meeting, provide workshops for principals who would like support with SIP planning, and have conversations with boards where principal ownership of SIPs is at a sustainable level.

Principal networks are another way to ensure that principals are involved in improvement planning. Networks function as a forum to improve messaging and understanding of the BIPSA. Some boards have described networks as instrumental in building principal capacity for SIP development. Principal professional learning is important to the role of principals in improvement planning as well. Principal learning sessions could be used as a time to share SIPs with one another and / or discuss linkages between the BIPSA and SIPs.

Use of Data

The use of data in improvement planning is a challenge for many of the boards that participated in the project. We suggested many different things in order to address this challenge. In one instance, we advised a board to consider experimenting with strategies in the monitoring section to determine which pieces of data are the most valuable in identifying student achievement as related to the strategies /actions. In another instance, we advised a board to consider having a conversation about how the data tells whether the strategies are working. We suggested that another board consider reducing the strategies / actions in each goal in order to be more specific about how, what, when, etc. for the professional learning for each strategy / action. This will provide more specific data sources at the system and school level to monitor.

Looking for Gaps

The literature indicates that in order to see significant increases in good student achievement scores, it is necessary to look for gaps in achievement for certain groups. In order to increase student achievement scores at the system level, we suggested a couple of different approaches to boards. We suggested having each of the literacy, numeracy, and student success groups in the BIPSA planning meetings analyze data to determine which groups of students are not achieving at the provincial standard in order to revise the SMART goals to reflect only the population where the gaps exist. Once specific populations are identified in the needs assessment, SMART goals should be aligned so they address the expected increase in achievement for that population. When SMART goals are more specific to certain populations of students, then SIPs will be aligned more easily to the BIPSA and monitoring will make more sense. It was also suggested that over time, boards should consider having reflective discussions about student achievement in relation to strategies, actions and professional learning to find a narrower and more precise focus in student achievement gaps and therefore develop more achievable goals.

Strategies and Actions

In the strategies/ actions section of improvement planning documents, some boards were advised to consider reviewing / revising in order to make it more specific to system professional learning. As well, discuss ways to include data in the monitoring strategies in order to articulate on the BIPSA best practice that tracks student achievement in relation to strategies / actions.

Working with Qualitative Information

Many of the boards that participated in the project discussed having difficulties working with qualitative information. In order to address this, boards were asked to consider having members of the BIPSA planning team gather qualitative information from teachers about student need / improvement with relation to board projects related to the BIPSA. Consider collecting information from informal conversations and observations by principals with teachers on the impact of professional learning on student achievement in their schools. As well, consider seeking professional learning for BIPSA team members about how to collect and use qualitative data. This will help them to facilitate conversations with principals and teachers so that they can use that information in the needs assessment. Explore the following inquiry question – how can our reflective conversations with teachers and principals be used to collect qualitative data to inform our BIPSA needs assessment? Consider including someone trained in qualitative research to facilitate this conversation.

Needs Assessment / Alignment

The needs assessment was described as a challenge by many boards who participated in the project. Many of our suggestions in this area centred around ensuring that all groups (e.g. elementary panel, secondary panel, special education, etc.) and levels within the board work together to create the BIPSA. Working on the needs assessment together may also help with alignment in all areas. It is important to formalize a needs assessment summary from discussions. It may also be helpful to review and discuss other BIPSAs with a focus on how the needs assessment is aligned to the SMART goals and in turn are aligned to strategies and monitoring. At school level sessions, principals and staff should look for alignment from their SIPs to the BIPSA. The BIPSA planning team can also compare SIPs with the BIPSA to check for alignment.

At the end of the school year, it would be useful to consider including in the BIPSA the results from the evaluations sections for each pillar and use this information for the needs assessment the following year. Then, share this information with principals so they see how their work at the school level contributes to moving the system further.
It was suggested to some boards that they spend time gathering and delving deeper into data for the needs assessment. This can be accomplished in a number of ways, but it should include the BIPSA team as well as senior administrators. This will help to sharpen the focus in the needs assessment as boards can discover any gaps in learning. At network team meetings, formal discussions about how information from learning cycles might inform the board needs assessment should take place. These conversations will ensure that qualitative data is informing the plan at the board level.

Superintendents should focus their monitoring discussions with principals on the SIP needs assessment. This will help to focus information on the BIPSA. Professional learning should be linked to the relevant components of the BIPSA so participants understand why the content is being offered. This provides a constant link back to the plan, helps with ownership, and provides the rationale for why it should be completed.

System School Alignment

A challenge for some boards is ensuring alignment between the system and school levels. A number of recommendations were suggested to assist with this challenge. For example, at the system level, consider analyzing SIPs in relation to the BIPSA for alignment to board plans and strategies and check SIPs to determine if the goal the school has focused on is actually a real need at that school. Then, facilitate school to school improvement team visits to share school improvement plans and discuss ways to overcome the challenges they face.

Another way to improve alignment is to place some responsibility on principals. For example, consider asking principals to highlight the area of the BIPSA that their SIP addresses and present this information to trustees. Also, find ways to support principals in having conversations with their teachers about how professional learning has impacted their practice in specific ways and follow up with principals in regularly scheduled superintendent visits. Looking at the impact of professional learning is also a good data source to consider when updating improvement plans.

Look at other Board BIPSAs

Many boards were interested in seeing how other boards are conducting board improvement planning. Many asked to see other board's BIPSAs. As a result, we incorporated board plans into the recommendations if applicable. We also included, with permission, participating board BIPSAs in the London MISA PNC Board Improvement Planning Toolkit. We directed some boards here to review other boards' BIPSAs. These recommendations usually focused on a particular area of the plan.

Special Education

Many boards are still working to fully integrate special education into the improvement planning process. A number of suggestions were made to address this present change. For example, some boards were asked to consider having a discussion with a board that has studied data on this population more deeply in order to see a model in action. Specific board contacts were provided to facilitate these connections across the region.

When working with special education data, in order to streamline the focus on special education, boards were asked to consider honing in on students on IEPs in the needs assessment. They could compare report card data for students on IEPs with EQAO data for the same population to discover a more precise and narrow focus for strategies on the BIPSA. This also may be helpful in the deployment of funds and human resources.

It was also suggested that boards consider discussing ways to rethink, remove, and revise strategies / actions on the BIPSA so that they will directly impact special education students. Ensure that the SIPs are aligned with any BIPSA focus on special education students. Monitoring just those students for the entire year may yield interesting results.

Collaboration

Collaboration is key to successful improvement planning. In order to encourage this, a number of suggestions were provided to boards. For example, consider having senior administrators share SIPs with the program department in order to more fully inform the student achievement aspect of the BIPSA. Another suggestion, provided to some boards, was to consider having a learning fair at the end of year where schools are invited to share their school improvement planning. Consider inviting the MOE, Executive Council, and program people. Results of the evaluation component of the BIPSA could be shared by the board as their contribution to the fair.

Ownership

In some boards, there were challenges around ownership of improvement planning. In order to increase ownership of the SIPs and BIPSA, some boards were asked to consider how they may bring improvement planning into everyday meetings and conversations.

Summary of Resources Provided to Boards (Not Board-Specific)

To accompany the recommendations, specific resources were provided to boards. These resources addressed particular needs as discussed in the initial board visits and were in addition to the materials available in the project toolkit. The toolkit is available on the London region MISA PNC website. All boards have been directed there as well for additional resources.

During the summary visits with boards, there were many instances where the project consultants provided additional resources. These were requested by board teams and / or the consultants believed they would serve a need expressed during the visit. The summary visits were also an opportunity to explain the resources provided. The following is a summary of the resources that were provided to the boards in advance of the summary visits:

Many of the boards received a BIPSA from another participating board as a resource. BIPSAs served as examples to highlight component parts of board improvement planning such as SMART goals, document format, use of language, document set-up, strategies / actions, monitoring, inclusion of special education, etc. In all cases, with the permission of the author boards, the documents were brought to, discussed, and left with boards to use as examples when planning for future BIPSA development.

Another common resource provided to boards was to provide a contact person who possessed some experience in an area of improvement planning. Many topics were addressed, including working with qualitative data, experience with principal network teams, working with special education data, experience with learning fairs, and principal involvement in school improvement planning.

In addition, further resources were suggested if it was determined that they would be useful to boards for improvement planning purposes. Resources were gathered from participating boards as well as from improvement planning literature. These resources focused on a number of areas, including collaborative action research, creating inquiry questions, collaborative learning cultures, process and planning for school improvement planning, assessment and evaluation, data, and leadership.

Often times in the summary visits, questions and/or new discussions were brought up that were not mentioned in the initial visits. As such, it was often beneficial to supply board teams with additional resources. The following is a summary of the resources that were provided to boards as a result of these discussions.

In addition to the board improvement plans that were brought to the summary visits, it often became apparent that additional plans would be helpful to board teams. Plans were provided to address numerous challenges, including providing examples of short and concise plans, illustrating how special education can be integrated well into an overall plan, and to demonstrate specific strategies / actions. Additionally, many teams asked for electronic versions of the plans.

Contact persons were also provided for many areas of concern, including special education, working with qualitative data, explanation of a bottom-up (grassroots) approach, working with special education, principal capacity and ownership of SIPs, delving deeper into data in the needs assessment, and asking good questions of data. Contact persons were chosen ahead of time in order to gain permission, and they were chosen because initial visits and board plans suggested that they have experience and/or have developed some expertise in the area.

Board teams also provided suggestions for components in the toolkit and additional resources. These included implementation science, examples of ways qualitative data is being used by school boards, examples of assessment calendars, guides that lay out the process of improvement planning, and a discussion of how to measure mental health.

Discussion of the Importance of Summary Visits

Originally, the summary visits were included as a project component in order to provide participating boards with information in a straightforward way. Since this information included recommendations and resources for boards in improvement planning, these visits were considered to be an opportunity to provide further context and explanation around these pieces as well as to discuss overall project results. It soon became clear, however, that the summary visits were more than just an opportunity to provide boards with project information. These visits spurred very rich discussions about improvement planning that included further questions, suggestions for project next steps, and the sharing of current practices. Many suggestions were provided for the literature review and toolkit components as well. These were unexpected yet extremely valuable contributions to the project, which has made the project much more significant for boards in improvement planning.

Consistent with the project focus for 2011-2012, the 2012-2013 project deliverables will aim to continue to support school boards in the London region. The main focus will be the continuous building of the project toolkit, which is currently available on the London region MISA PNC website. Throughout the school year, materials will continue to be collected and posted online.

Project information collected to date will be summarized and distributed to Directors of the sixteen boards in the London region as well as to the Ministry of Education.

A reminder will also be sent that this report will be available on the London Region MISA PNC website.

www.MISALondon.ca

Appendix A: Question Guide: Initial School Board Visits

Focus of Question Guide
The questions in this guide are focused on three broad areas of the Board Improvement Plan for Student Achievement (BIPSA) for Ontario school boards. These three areas are development, implementation, and monitoring of the BIPSA. These broad areas will be manipulated so they are relevant to the experience of each of the participating schools boards in the London region.

Question Guide (2 hours in length)

1. How does the process of developing the BIPSA work in your board?

Probes :
Process for gathering data
People who are involved
Communication
Timelines for completion
Strategies, outcomes, SMART goals
What conversations are you having around the table when discussing ... (e.g. SMART goals, strategies)
Ministry involvement & expectations
What is working well & why
Challenges – suggestions to address?

How has LNS or Student Success been involved in your process?

How do school improvement plans fit in? How much do schools have to do with BIPSA?

What do you see as the link between the BIPSA and SEF? How is that link manifested within your board?

2. How does the BIPSA get implemented within your board?

Probes :
Process
People who are involved
Communication
What conversations are you having around...
Timelines
Ministry involvement & expectations
What is working well & why
Challenges – suggestions to address?

3. Describe the process that takes place to monitor the BIPSA within your board.

Probes :
  What data is collected / process for collecting data
  People who are involved
  Communication
  Timelines
  Conversations that take place
  How does the process of monitoring work OR is there a process?
  Specific tools used to collect this information (e.g. checklists, guides, etc.)
  District reviews play a role?
  Ministry involvement & expectations
  What is working well & why
  Challenges – suggestions to address?

4. What do you see as challenges in the development of the BIPSA?

Probes :
  Within your board
  Province-wide

5. What do you see as challenges as you implement the BIPSA?

Probes :
  Within your board
  Province-wide

6. What do you see as challenges in the monitoring of the BIPSA?

Probes :
  Within your board
  Province-wide

7. Do you have anything else you would like to add before we finish up?

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