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# I. Task Force Mandate and Process

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## Mandate

As I noted in my “Preface,” the Education Equality Task Force was announced in the Speech from the Throne on May 9, 2002. The government appointed me to review the province’s education funding formula and to make recommendations, to be considered for the 2003–04 school year, on ways to improve equity, fairness, certainty, and stability in the funding of Ontario’s students and schools.

I was asked to review six aspects of the funding formula:

1. the effectiveness of the model for distributing funding between different types of boards (for example, between urban and rural boards, between small and large boards)
2. the structure of cost benchmarks (for example, does per pupil funding reflect appropriate per pupil costs?)
3. the degree of local expenditure flexibility school boards should have
4. approaches to addressing school renewal (for example, maintenance, repairs, renovations)
5. whether the current approach to funding special education is the most responsive way to meet students’ needs
6. the approach to funding student transportation, including ways to maximize opportunities for shared busing services between school boards that serve the same communities

In addition, I was asked to ensure that my recommendations:

- promote the principles on which the funding mechanism was built, which include fairness, equity, responsiveness to learners’ needs, and accountability
- improve the stability of the education system
- respect the legislative and constitutional framework for education in Ontario, which includes public, Catholic, French-language, and English-language school boards
- take into account the fiscal situation of the Province

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## Expert Advisers

I was assisted in my work by a five-member team of independent expert advisers: Ann Vanstone, Patrick Slack, Lynn Beyak, Brian Cain, and Mariette Carrier-Fraser. Their biographies appear in Appendix A, as does mine.

Each of these experts possesses broad experience acquired during a career of service in Ontario's education system. Together they have served as a key resource, working directly with me as I met with stakeholders and the public, reviewed research and submissions, and developed my recommendations.

All of the advisers are independent volunteers not currently employed in the education sector.

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## Stakeholder Advisory Committee

I was also assisted by a 31-member Stakeholder Advisory Committee. This committee was composed of representatives from major education-related organizations, including those representing parents, students, teachers, principals, trustees, directors of education, and school board supervisory officials. Their names and affiliations can be found in Appendix B.

The role of the Stakeholder Advisory Committee differed from that of the expert advisers. While the expert advisers were acting in an independent capacity, each member of the Stakeholder Advisory Committee brought the perspective of his or her group to the consultation process. The Stakeholder Advisory Committee provided the current perspectives of members of the education community, helped the task force focus on key issues in its discussion paper (see below), and provided advice on the structure of the consultations. In addition, each committee member's organization made a presentation or submitted a brief on the issues under consideration.

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## Research and Consultation Process

I began my research and consultation process in late May 2002 with a detailed review of Ontario's education funding formula and past studies and reports related to the formula. These activities continued through the spring and summer.

To encourage a wide range of input from the education community and members of the public, in July 2002 my staff established a website where I posted information about my mandate, objectives, and activities. I also encouraged people to use the website, or the mail, to send me their opinions on the issues in my mandate.

In the summer of 2002, with the assistance of my expert advisers and the members of the Stakeholder Advisory Committee, I developed a discussion paper and posted it on the task force website. The paper, which was designed to frame the research and consultation process, posed questions about the role of the funding formula in advancing five principles: the quality of student learning and achievement, equity and fairness, responsiveness to local needs, accountability, and affordability. While the paper focused on these five principles, I encouraged readers to consider *all* aspects of the formula open to discussion. (Appendix C contains an excerpt from the discussion paper, covering the main points.)

My research covered a wide range of issues, focusing on education funding but also looking at studies on education itself, education systems, and the effect of various influences on children's ability to learn and to succeed in school. I wanted my recommendations to be based not only on what I heard during my consultations, but also on empirical studies and evidence-based research.

My staff and I reviewed education funding concepts and systems across Canada and in the United States, the United Kingdom, and New Zealand to see how they handled the various issues involved. I also benefited greatly from the research services of the Ministry of Education's Strategic Planning and Elementary/Secondary Programs Division and the data gathering and modelling capabilities of the ministry's Elementary/Secondary Business and Finance Division. Staff of these divisions responded to my questions and provided data promptly and thoroughly.

I consulted some of the most eminent thinkers in education in Canada:

- Dave Cooke, former Minister of Education and Training in Ontario; former Co-Chair of the Education Improvement Commission and the Task Force on Effective Schools
- Dr. Michael Fullan, Dean of the Ontario Institute for Studies in Education/University of Toronto; researcher, consultant, and policy adviser to education organizations and government agencies in Canada, Britain, and elsewhere
- Veronica Lacey, President and Chief Executive Officer of The Learning Partnership; former Deputy Minister of Education and Training in Ontario; former Director of Education and Secretary-Treasurer of the North York Board of Education
- Dr. Dan Lang, Professor, Higher Education Management and Finance, Department of Theory and Policy Studies, Ontario Institute for Studies in Education/University of Toronto
- Dr. Fraser Mustard, Founding President and Fellow, The Canadian Institute for Advanced Research; a leading researcher in the socio-economic determinants of human development and health, with a particular emphasis on early childhood
- Dr. Charles E. Pascal, Executive Director of the Atkinson Foundation; former Deputy Minister of Education and Training and of Community and Social Services, both in Ontario
- Dr. Charles Ungerleider, Professor, Sociology of Education, Department of Educational Studies, University of British Columbia; former Deputy Minister of Education in British Columbia

I also read both published work and pre-publication manuscripts by these people, as well as the writings of other highly respected researchers in the fields of education such as Michael Barber, Richard Elmore, and Peter Hill. (See also the "Select Bibliography" at the end of this report.)

My public consultation process, which was extensive, was designed to be as inclusive as possible. In August 2002, I held a series of 12 roundtable discussions with 179 invited participants. The participants, who had been recommended to me by members of the Stakeholders Advisory Committee and others, were grouped as follows: parents, students, trustees, administrators, principals, teachers, taxpayers, francophone educators and community members, people from both urban and rural boards, school board support staff, and special education staff. My expert advisers and I spent one day with each group.

In September 2002, I hosted 10 days of public meetings in the following cities: Ottawa, Thunder Bay, Toronto, North Bay, London, and Barrie. These hearings were advertised extensively in the media. They were scheduled from 9 a.m. to 9 p.m. to accommodate as many participants as possible, particularly those working during the day. A total of 575 people, representing organizations or appearing as individuals, made presentations at these hearings.

To improve my understanding of Ontario's schools, I took advantage of the public meetings to visit schools in each of the cities where hearings took place. I visited English- and French-language, public and Catholic, and elementary and secondary schools.

In early October 2002, I held a series of brief but informative meetings with representatives of the major education stakeholder groups in the province and the Chiefs of Ontario. I also met, at their request, with members of the caucuses of the Progressive Conservative Party, the Liberal Party, and the New Democratic Party.

In all, I met with or heard presentations from more than 900 people and the task force received 882 formal submissions. All of these submissions were reviewed and given careful consideration as I formulated my recommendations.