

# Notes

*Note:* The universal resource locators (URLs) for electronic texts that are cited below were accessed during the course of the task force's research, between May and November 2002. Some or all of these electronic texts may be inaccessible after publication of this report, or they may no longer be available at the URLs shown. The task force takes no responsibility for their accessibility.

1. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/eguide02.pdf>>, and Ministry of Education staff.
2. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., 1.
3. Increases to the student-focused funding formula since its inception are described in Appendix H, note 3.
4. Ontario, Ministry of Education, "Student-Focused Funding: Parents Guide 2002–03," op. cit., and Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>.
5. For example, Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service" (2002), <[http://www.ncsl.org.uk/index.cfm?pageid=ev\\_auth\\_barber](http://www.ncsl.org.uk/index.cfm?pageid=ev_auth_barber)>; Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002); and Charles Ungerleider in a book about the future of Canadian public schooling, to be published in Canada by McClelland and Stewart in 2003.
6. Britain and other jurisdictions came to this realization. See Michael Barber, "High Expectations and Standards for All, No Matter What: The Leadership Challenge for a World Class Education Service," op. cit.
7. In a conversation I had with him, Dr. Charles Ungerleider referred to the optimum benefit as "productive efficiency."
8. Richard F. Elmore, *Bridging the Gap Between Standards and Achievement: The Imperative for Professional Development in Education* (Washington, D.C.: Albert Shanker Institute, 2002), 5.
9. The exception is the Transportation Grant, which is based on an allocation in the old, pre-1998 funding formula. Nonetheless, the costs involved in providing student transportation can be measured and the grant can be adjusted to reflect actual cost. Therefore, when I refer to "updating the benchmark costs of all components of the funding formula," I am including the costs involved in providing student transportation.
10. Michael Fullan, *Change Forces with a Vengeance* (London: RoutledgeFalmer, 2002), 18.
11. For example, Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities* (Toronto: The Founders' Network, 2002). See also the works cited in Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 4.
12. Margaret Norrie McCain and J. Fraser Mustard, *The Early Years Study, Three Years Later: From Early Child Development to Human Development: Enabling Communities*, op. cit.
13. Quoted by David Crane in "By failing children, we fail ourselves," *Toronto Star* (October 20, 2002).
14. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
15. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 9.
16. The allocation for ALF does not take into account three years of data; rather, it is a calculation based on three factors: basic level of service, an "assimilation" factor, and cost per instructional unit. For more information on both ESL/ESD and ALF/PDF, consult Ontario, Ministry of Education, "Student-Focused Funding: Technical Paper 2002–03" (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 18–22.

17. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
18. See Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 18–22.
19. Canada, Royal Commission on Aboriginal Peoples, “Education,” chap. 5 in *Gathering Strength*, vol. 3 of *Report of the Royal Commission on Aboriginal Peoples* (Ottawa: the Commission, 1996), 433–34.
20. Expert Panel on the Learning Opportunities Grant (Ontario), *Learning Opportunities Grant – Panel Report to Minister of Education and Training* (Toronto: Ontario Ministry of Education and Training, 1997), 6.
21. Because French-language school boards operate in areas where the majority of the population is English-speaking, they struggle constantly against the assimilation of their students into the English-language culture.
22. For the funding formula’s definitions of a small elementary and a small secondary school, see Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 25 (the “Geographic Circumstances Grant”).
- Pages 7–8 of the document (“Foundation Grant”) describe the calculation used to determine the core resources for a school. It shows that the funding formula makes provision for 2.75 principals for every 1,000 elementary students. Thus, to be able to fund one principal, an elementary school must have at least 364 students (1,000 / 2.75). Current information indicates that the average elementary school size is 340 students, and that over 60% of existing elementary schools have fewer than 364 students.
- For secondary schools, the formula provides for 1.1 principals for every 1,000 secondary students, which means that a minimum of 909 pupils (1,000 / 1.1) is needed to obtain funding for one principal. Current information indicates that the average secondary school size is 847 students, and that over 55% of existing secondary schools have fewer than 909 students.
23. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
24. The Ministry of Education’s technical document on the Pupil Accommodation Grant notes that “In 1998, detailed information on each school in Ontario was compiled through the School Facilities Inventory System and used to determine the capacity of each board’s elementary and secondary schools on a consistent basis across the province.” This “rated” capacity can be adjusted in certain circumstances, such as when a board sells a school. In 2001–02 the formula was changed to allow boards that would not normally qualify for new pupil places to be eligible to receive funding to address “significant and persistent enrolment pressures at specific schools.” Ontario, Ministry of Education, “Student-Focused Funding: Pupil Accommodation Grants 2002-2003” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203pupilacc.pdf>>, 3–5.
25. The limits on boards’ spending flexibility are described in Chapter 2 of this report.
26. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
27. Examples include the Society for College and University Planning, the American Public Works Association, and the Canadian Association of University Business Officers. See also Toronto District School Board, *Facility Review and Assessment, Executive Summary* (Toronto: the Board, 2002), which contains information about cyclical renewal costs.
28. The \$266 million figure was arrived at as follows: The original allocation for the 2002–03 year was \$241 million. In its May 2002 budget, the government announced an additional \$25 million for school renewal, which the Ministry of Education has now added to the \$241 million, for a total of \$266 million.
29. The ministry’s initiative to assess school renewal needs will generate sufficient information to calculate a Facilities Condition Index (FCI) for each school, each board, and the public education system as a whole. An FCI is the estimated maintenance renewal costs divided by the capital replacement value of a school. For example, if a school’s replacement value is \$10 million and it has an estimated maintenance renewal cost of \$1.5 million, the FCI would be 0.15.
30. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.

31. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
32. The Special Education Per Pupil Allocation is provided on the basis of a sliding scale, with lower levels for secondary school students. For more information, see Ontario, Ministry of Education, “Student-Focused Funding: Technical Paper 2002–03” (2002), <<http://www.edu.gov.on.ca/eng/funding/e0203tech.pdf>>, 13.
33. The ISA Working Group was established by the ministry. It comprises representatives of the Minister’s Advisory Council on Special Education, trustee associations, supervisory officer associations, senior business officials, and parent groups.
34. Ontario, Office of the Provincial Auditor of Ontario, “2001 Annual Report” (2001) <<http://www.gov.on.ca/opa/English/ro1t.htm>>, 126–27.
35. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
36. This figure is an estimate of the update to August 2002. The figure updated to August 2003 would be even higher, but, because I cannot predict the outcome of current salary and benefit negotiations, which have funding implications for the 2002–03 year, I cannot estimate that figure.
37. The website of the U.S.-based Consortium for School Networking (CoSN), <<http://www.cosn.org>>, offers information on a variety of topics related to information and communications technology, including the concept of total cost of ownership.
38. The 2002 Ontario Provincial Budget committed \$17 million over two years to the assessment of school renewal needs (the initiative referred to earlier in this chapter and in note 29, above). These funds will be used for, among other things, the acquisition of standard asset management software for each board.