Student-Focused Funding

Intensive Support Amount (ISA)

Guidelines
for School Boards

Spring 2001
Ministry of Education

This publication supersedes the 2000-2001 Resource Manual for the Special Education Grant Intensive Support Amount (ISA): Guidelines for School Boards.

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Glossary of Terms

ADP	Assistive Devices Program
FM	frequency modulation
FTE	full-time equivalent
IEP	Individual Education Plan
IPRC	Identification, Placement, and Review Committee
ISA	Intensive Support Amount
OEN	Ontario Education Number
OSR	Ontario Student Record
PAAC on SEAC	Provincial Parent Association Advisory Committee on Special Education Advisory Committees
PSIE program	Personalized, Special Instructional Equipment program
SEAC	Special Education Advisory Committee
SEPPA	Special Education Per Pupil Amount
SIP	Special Incidence Portion

Special Education Funding

Overview

The government is committed to funding school boards so that each student in Ontario has access to a high-quality education regardless of the student's background or where the student lives. Student-focused funding ensures that the government meets that commitment.

Funding for services and supports for students with special needs is provided through several grants that are part of student-focused funding. The Foundation Grant provides for costs associated with the basic requirements of all students, including those with special needs. The Special Education Grant provides funding to meet the incremental costs of special education programs and supports (that is, the costs above the basic costs of education associated with all students). In addition, boards also use funding from other special purpose grants – grants such as the Transportation Grant and the Teacher Compensation Grant – to help meet needs of students with special needs.

The Special Education Grant comprises two components:

- the Special Education Per Pupil Amount (SEPPA), which is a standard per-pupil amount based on each board's total enrolment; and
- the Intensive Support Amount (ISA), which is a variable amount based on each board's share of students with very high needs.

The current level of special education funding continues to be protected in 2001-02. As part of the government's commitment to increase board's flexibility to address local priorities, boards have flexibility in how they spend any increase in their special education funding in 2001-02.* Boards may continue to direct additional funding to special education programs and supports.

* A school board's envelope of protected special education funding is the lesser of its special education funding envelope in 2000-01, as calculated per the Student-Focused Funding – Legislative Grants for 2000-01 or its special education funding envelope in 2001-02, as calculated per the Student Focused Funding – Legislative Grants for 2001-02.

ISA Funding Levels

ISA Level 1
Provides funds for specialized equipment for individual students with high needs.

ISA Levels 2 and 3
Provide funds to boards based on the number of students with very high needs, for the provision of specialized programs and services (intensive staff supports in the classroom).

ISA Level 4
Provides funds for educational programs offered to children and youth admitted to care, treatment, or correctional facilities.

Special Incidence Portion (SIP)
Provides funds for staff support for students with extraordinarily high needs to ensure safety in the classroom.

Funding under ISA Level 1 is provided for specialized equipment for individual students and is based on documentation that supports their needs for specialized equipment. This equipment moves with the student if the student moves from one school to another or from one board to another.

Funding for SIP is also provided for individual students, based on documented needs for very intensive staff supports required to ensure the safety of the student or other students.

The SEPPA portion of the Special Education Grant provides each school board with a standard amount of funding based on the total number of students enrolled in the board. SEPPA funding meets the needs of most students who require some special education services.

ISA Levels 2 and 3 provide each school board with funds based on the board's demonstrated incidence of students with very high needs. Boards receive different levels of ISA funding based on the total number of claims they have submitted for students that meet various levels of ISA eligibility criteria.

The needs of special education students are highly variable. Many students have mild or moderate needs that require some extra supports. Some students have very high needs that require intensive staff supports in the classroom every day. Not all students who need intensive staff supports need the same level of support. As a result, school boards must have flexibility to design individual programs for each student with special needs.

For this reason, funding from SEPPA and ISA Level 2 and Level 3 is not allocated to specific students or used on a strict student-by-student basis. SEPPA is provided to each board based on total enrolment. The ISA Level 2 and Level 3 claim and audit process is intended to assess each boards' relative proportion of students with very high needs, and to provide funding in proportion to each boards' incidence of those students. Each board uses its total special education revenue – both SEPPA and ISA Levels 2 and 3 – to meet the needs of all its students with special needs.

Funding for ISA Level 4 is provided to boards to support educational programs provided by boards in correctional, care, and treatment facilities operated by other Ontario government ministries or community agencies. This funding allows boards to provide teachers, teaching assistants, learning materials, and classroom supplies and equipment for children and youth in these facilities.

Ongoing Refinement of the Special Education Grant

We have increased special education funding levels every year since the government introduced student-focused funding.

The ISA approach to special education funding was first implemented in 1998–99. The ministry has continued to refine this approach over the past three years. Interim measures were put in place to support program stability and to avoid adverse impacts on programs that would result from a reduction in special education revenue.

In 1998–99, school boards received funding based on the results of the 1998 claim and audit process or on ministry projections made at the time of the announcement of student-focused funding in 1998, whichever was higher. In 1999–2000, boards received the same level of funding for ISA Level 2 and 3 as they received in 1998–99.

For the 2000–01 school year, to ensure stability of programs, the ministry continues to provide funding for stability based on the funding results of past years. Boards are funded on the basis of their highest result in 1998, 1999, or 2000. This means that many boards are receiving funding in addition to the level generated by eligible claims in 2000.

For the 2001-02 school year, the ministry will continue to provide funding for stability based on boards' final ISA Level 2 and 3 allocation in 2000-01. In addition, funding for student-focused funding has been increased and district school boards have been given the flexibility to use this funding increase to address local priorities. Boards can use their share of this funding to address cost pressures for supports for students with special needs.

The ISA Working Group

In November 2000, the ministry established an ISA working group with a mandate to develop recommendations to support ongoing improvements to ISA funding. The group includes a wide range of provincial associations including representatives from trustees, supervisory officers, business officials, special education administrators, the Minister's Advisory Committee on Special Education, the Ontario Parents Council, and the Provincial Parent Association Advisory Committee on Special Education Advisory Committees (PAAC on SEAC).

In January 2001, the ISA working group recommended a number of integrated strategies to improve ISA funding. The strategies focus on making the process more predictable,

more responsive to need, and less administratively burdensome. The ministry has committed to a multi-year strategy to improve the ISA funding approach based on the recommendations of the ISA working group. A more detailed outline of future refinements to ISA Levels 2 and 3 funding is provided in **Appendix E**.

Funding Directions for 2001–02 and 2002–03

ISA Level 1	Boards will continue to apply for funding for specialized equipment for individual students with high needs. To reduce administrative burden, boards will submit a summary of claims, subject to audit. Beginning in 2001–02, school authorities in children's hospitals will be able to apply for funding for specialized equipment for individual students. Equipment purchased through this process will be portable to support the transfer of students to district school boards.
ISA Levels 2 and 3	In response to the recommendations of the ISA working group, the ministry will implement a two-year strategy to improve the ISA claim and audit process. Over the summer of 2001, the ministry will be working with its education partners to clarify the ISA eligibility criteria and develop supports to improve the consistency of ISA results. Beginning in the fall of 2001, boards will complete a comprehensive audit over the 2001–02 school year (and part of 2002–03 where necessary), to establish a new baseline of eligible ISA files. In the interim, the ministry will provide stable ISA funding to boards for 2001–02 and will provide an increase to student-focused funding in 2001–02 that boards can use flexibly to address service pressures. The stable funding approach will be reviewed for the 2002–03 school year.
ISA Level 4	Boards will continue to apply for funding following ministry guidelines for educational programs for students admitted to care, treatment, and correctional facilities.
SIP	Boards will continue to apply for SIP funding on behalf of students with extraordinarily high needs.

ISA Level 1 Specialized Equipment Funding

General Information for District School Boards

An ISA Level 1 claim may be put forward by a school board to meet the needs of students who require a total expenditure on specialized equipment in excess of $800, including freight and taxes, for the school year.

There will be a spring and a fall cycle of ISA Level 1 claims, which will be incorporated into the board's regular budget cycle.

The spring cycle allows boards to purchase equipment and have it in place for the start of the 2001–02 school year. The fall cycle allows boards to meet their in-year equipment needs.

An ISA Level 1 claim may be submitted for any student with special needs enrolled in a board, whether or not a claim is being made for ISA Level 2 or 3 funding.

Boards are required to complete, on a ministry claim form, a summary of all of their ISA Level 1 claims.

Claim documentation, except for claims over $6000, is not submitted to the district offices but is retained by the boards for ministry audit purposes.

For ISA Level 1 claims exceeding $6000, the board must seek pre-approval from the Ministry of Education district office to confirm that other less costly options have been explored and are not appropriate. Once approved, boards may include the claim on the ISA Level 1 summary claim form. To complete the equipment claim process for individual claims exceeding $6000, boards must provide invoices indicating the actual cost to the district office of the Ministry of Education.

ISA Level 1 summary claim forms must be prepared according to ministry instructions and must be verified and signed by the board's supervisory officer responsible for the special education program before being submitted to the district office for processing.

As part of the ISA Level 1 funding process, the ministry provides boards with the summary claim form submitted in the previous claim cycle to allow boards an opportunity to adjust equipment costs reported as estimates to reflect actual costs. The adjusted summary claim form is submitted along with the current cycle's summary claim form for processing. The ministry adjusts boards' ISA Level 1 equipment funding allocation to reflect actual costs, if necessary.

Beginning in 2001-02, boards may submit an early ISA Level 1 claim for students who were attending a provincial or demonstration school and have enrolled in a district school board for the 2001-02 school year. This will ensure that boards have the specialized equipment in place for these students with special needs at the beginning of the school year and will ensure continuity in service delivery.*

To be complete, documentation for each ISA Level 1 claim must be maintained by the board and must include the required assessment and quote or invoice.

Boards are encouraged to use the spring cycle to ensure that equipment is operational and in place for students' first day of school.

The board should ensure that equipment purchased for students whose enrolment is not confirmed is returnable.

* Boards will co-ordinate the application process, including submission deadlines, with the appropriate Ministry of Education district office. Planning for the submission with the district office can begin before the student enrols in September.

Spring Cycle	Fall Cycle
C **May 28, 2001:** Boards submit ISA Level 1 claims for students enrolled in the board in 2000–01, for new equipment to be used in the 2001–02 school year. Boards submit adjusted ISA Level 1 summary claim forms from the fall cycle, to report actual costs of equipment. Boards submit completed ISA Level 1 summary claim forms and adjusted summary claim forms to the appropriate district office of the Ministry of Education. For claims in excess of $6000, full documentation must be submitted with the summary claim form. Boards must submit proof of purchase for equipment purchased in excess of $6000, that was claimed in the fall cycle, to the appropriate district office. C District offices conduct audits of at least 10 percent of claims reported on ISA Level 1 summary claim form and make necessary adjustments. C **June 29, 2001:** Boards include estimated ISA Level 1 equipment costs, in their 2001–02 Estimates for student-focused funding.*	C **November 15, 2001:** Boards submit ISA Level 1 claims for students enrolled in the board in 2001–02, for new equipment to be used in the 2001–02 school year. Boards submit adjusted ISA Level 1 summary claim forms from the spring cycle, to report actual costs of equipment. Boards submit completed ISA Level 1 summary claim forms and adjusted summary claim forms to the appropriate district office of the Ministry of Education. For claims in excess of $6000, full documentation must be submitted with the summary claim form. Boards must submit proof of purchase for equipment purchased in excess of $6000, that was claimed in the spring cycle, to the appropriate district office. C District offices conduct audits of at least 10 percent of claims reported on ISA Level 1 summary claim form and make necessary adjustments. C **December 15, 2001:** Boards include estimated ISA Level 1 equipment costs, in their 2001–02 Revised Estimates for student-focused funding.**

* Subject to confirmation of submission deadlines for Estimates for the 2001–02 student-focused funding cycle.

** Subject to confirmation of submission deadlines for Revised Estimates for the 2001–02 student-focused funding cycle.

General Information for School Authorities in Children's Hospitals

Beginning in 2001–02, school authorities in children's hospitals may apply for funding to purchase, for individual students, specialized equipment that costs in excess of $800, through a claim process that will be part of their annual budget process.

In preparing claims for specialized equipment funding, school authorities in children's hospitals should include documentation that outlines the full cost of the equipment including an estimate of taxes, installation, and delivery charges. Each claim must include the required assessment and quote or invoice.

School authorities in children's hospitals may only submit a claim, for individual students, for specialized equipment that costs in excess of $800. There will not be an $800 deductible for specialized equipment for individual students purchased by school authorities in children's hospitals, since school authorities do not receive the special education funding that district school boards use to pay the deductible.

The Ministry of Education will provide detailed guidelines to school authorities in children's hospitals on the specialized equipment claim process, as part of their budget approval instructions.

What's new under ISA Level 1?

ISA Level 1 claims in the spring of 2001 will not be validated by the ministry. Instead, boards will submit a summary of claims (as introduced in the winter of 2000–01). Boards no longer have to submit the required documentation for ISA Level 1 claims to the ministry, unless the equipment claimed costs in excess of $6000. Funding will flow to boards as part of the regular board budget cycle.

Beginning in 2001–02, school authorities in children's hospitals will be able to apply for funding to purchase, for individual students, specialized equipment that costs in excess of $800. The claim process for equipment will be part of their annual budget process. School authorities in children's hospitals will be required to submit all required documentation to the Ministry of Education District office for the claims to be processed. This equipment will be portable.

In 2001-02, a board may submit an early ISA Level 1 claim for students who were attending a provincial or demonstration school but have enrolled in a district school board for the 2001-02 school year.

Equipment Deductible and District School Boards

Equipment costs are cumulative for any given student. The ministry will deduct $800 from the total amount of ISA Level 1 funding claimed for a student in a board in a given school year.

In preparing claims for ISA Level 1 funding, school boards should include documentation that outlines the full cost of equipment including an estimate of taxes, installation, and delivery charges. The $800 deduction will be made by the ministry.

The ministry will not deduct $800 from the cost of each piece of equipment claimed for each board student. For example, if one student requires three pieces of equipment totalling $7200, the ministry will deduct a total of $800 once in 2001–02 for that student. If three separate students require $2400 each for equipment (totalling $7200), the ministry will deduct a total of $2400 for the equipment (3 x $800).

It is expected that boards will use other special education funding to cover the $800 deducted from the ISA Level 1 claim.

Leasing of Equipment

Some equipment is extremely costly. Boards and school authorities in children's hospitals are encouraged to make leasing arrangements that provide for maintenance and substitute equipment.

When leasing arrangements are made, the **entire cost of the lease** should be claimed in the first year – not as a pro-rated cost over the life of the lease. For example, a three-year lease at $1000 per year would be claimed as $3000 in the first year of the lease.

Eligible Specialized Equipment

All equipment claims must be for specialized equipment for individual students for use at the school or school authority.

Examples of such equipment are:

- speech analysers
- FM systems
- print enlargers for students with low vision
- amplification systems

- computer hardware/software
- individually modified desks or work tables
- adjustable desks or computer tables
- braille writers
- symbol or letter voice translators
- insulated booths and study carrels
- communication aids, for example, Boardmaker7, speech synthesizers
- positioning devices for sitting, standing, and lying
- other equipment that is required at school for the personal use of specific students to facilitate an approved course of study

Costs claimed may include the cost of equipment; insurance; warranty agreements; service agreements; and peripherals such as computer cables, batteries, and software required to make the equipment work.

Boards and school authorities in hospitals must ensure that specialized equipment purchased in Ontario meets Canadian safety standards, where applicable.

Radio-frequency equipment, optical aids, electronic devices, and positioning equipment often become damaged, obsolete, or outgrown. Approval for the same or a similar piece of equipment for the same student may be given after three calendar years when the request is accompanied by appropriate documentation.

If more expensive versions of equipment are purchased, there should be an explanatory note to justify the preference, such as compatibility with other components already on-site, or ease of use for a particular student's cognitive or manual abilities.

Boards and school authorities in children's hospitals must be able to show that due care has been taken to minimize costs (for example, protect devices from theft, reduce insurance costs, solicit competitive quotes for service agreements).

Where equipment is shared, the cost should be assigned to one student and the other students sharing it should be noted. An example of equipment that might be shared is a braille printer. If the student who claimed the cost of the equipment moves, the equipment may be left in the school to support the remaining students.

If a student receives equipment as part of an insurance settlement or benefit, the board or school authority in children's hospitals must not make an ISA Level 1 claim, as no costs will have been incurred by the board.

If a cost-sharing arrangement has been made, the board or school authority in a children's hospital may claim its share of the cost if its share exceeds $800.
It is expected that if an on-site visit were to be made in-year:

- the equipment would be found with the student for whom the cost was claimed,
- the equipment would be found in good repair, and

- the student and/or staff would be able to operate the equipment.

Required Documentation

Each ISA Level 1 claim must be documented by:

1. an assessment on file from an appropriately qualified professional,
2. a copy of the invoice(s) or proof of cost of equipment to be purchased, and
3. a current copy of the student's IEP.

Documentation should include the board's student number of the student assigned the equipment.

The first two requirements are expanded below.

1. An Assessment on File from an Appropriately Qualified Professional

The appropriately qualified professional will vary depending upon the nature of the student's disability and the purpose and function of the equipment. Regardless of who performed the assessment, it should indicate:

- that the particular device is essential in order for the student to benefit from instruction, and
- the disability that the device will help to ameliorate.

a) Braille Devices

When claims are made for braille equipment and/or software, there should be evidence that the claims are made for a student who is blind and that the equipment and/or software are required to ensure that the student can have access to his or her educational program. The vision assessment should be performed by an ophthalmologist; however, an assessment or letter of reference from a Provincial School for the Blind, verifying the need for braille and hence for braille equipment, will also be accepted.

b) Communication Devices

When a communication device (such as a speech synthesizer) is purchased, it will normally be purchased for a student who is nonverbal and/or multi-handicapped and/or autistic and/or developmentally disabled. The assessment on file should make reference to the disability for which the communication device is required and state how this particular device will ensure that the student can have access to his or her educational

program and/or assist the student in communicating with others at school. The assessment may have been done by an augmentative communication therapist, a speech therapist, or another knowledgeable person who serves as a consultant or resource to the board.

Students with some learning disabilities or severe physical disabilities may require other communication aids such as voice-activated software. Boards are expected to meet these needs while attending to cost-efficiency. For example, if a widely available voice-activated package will meet the student's needs, it should be obtained before investing in more expensive, specialty software.

c) FM Systems or Similar Devices

When an FM device is purchased, there should be evidence that it is for a student who is deaf or hard of hearing, and that this particular device is required to ensure that the student can have access to his or her educational program. The hearing assessment should be performed by an audiologist; however, an assessment or letter of reference from a Provincial School for the deaf, verifying the need for the equipment, would also be accepted.

When such devices are being considered for students with central auditory processing needs, a six-month trial period is recommended prior to making a claim.

Clear sound fields may be purchased for:

- students who are assessed as being hard of hearing by an audiologist, or
- students who are assessed by an appropriately qualified professional as requiring a sound field for other purposes.

d) Computer Hardware

Claims may not be made for computer hardware when all students in the class would ordinarily be provided with a computer. However, a claim for specialized equipment for an individual student may be made for computer hardware when the equipment is the most effective way of providing the students with a means of communicating his or her knowledge (for example, when the student has severely limited or nonexistent verbal communication, or a physical disability that makes writing extraordinarily difficult or impossible).

e) Mobility Devices

When a personal mobility or lifting device is purchased, it will usually be for a student with physical or developmental disabilities. The assessment on file should make reference to the disability for which the mobility device is required, and to the fact that this particular device is required to provide personal care for the student while at school. An occupational therapist is usually the qualified person who assesses and recommends specific equipment. In instances where the equipment was purchased with the assistance of the Ministry of Health and Long-Term Care's (MOHLTC) Assistive Devices Program (ADP) for home use, a parent's note indicating that this is the equipment used at home will also suffice, since this purchase would most likely have required a prior assessment by an occupation therapist.

Elevators **do not qualify** as lifts and **will not be approved** for equipment claims. Stair climbers **do not qualify** and **will not be approved** for equipment funding. These devices are used as an alternative to renovating a building for elevators or ramps and, therefore, relate to barrier-free design issues. These devices are not considered personal care aids or devices.

Examples of Eligible Needs

- A deaf or hard of hearing student who requires an FM amplification system in order to participate in his or her educational program.
- A student with low vision who needs to have large print materials and requires a device to enlarge print, such as a VisualTek7, Opticon7, or computer software such as WINVISION7, to participate in his or her educational program.
- A student who is assessed as being legally blind and is a braille user, and requires a braille printer, software to convert text to braille, and a number of other braille-marked learning aids (for example, Tactile and Visual Globe, APH Talking Science Calculator, or Tactile braille Rulers), to participate in his or her educational program.
- A student who is assessed by an appropriately qualified professional as being unable to communicate verbally due to a severe physical or communication disability, and requires a speech synthesizer for use at school. Although the unit may have been purchased through the Ministry of Health and Long Term Care's Assistive Devices Program for home use, the unit is not portable and, therefore, cannot be taken back and forth from home to school on a regular basis.
- A student who requires an assistive device in order to facilitate lifting, personal care, or other activities of daily living at school due to a physical or developmental or other disability.

2. A Copy of the Invoice or Proof of Cost

Boards and school authorities in children's hospitals are required to maintain, and school authorities in children's hospitals are required to submit, a file indicating the proof of cost of equipment to be purchased, including a copy of the actual invoice. This documentation should show the student number (or student name/date of birth, when student number is not provided) of the person assigned the equipment.

The board's student number must be associated with the equipment. This permits equipment to be tracked should it move with the student to another board or another school authority.

Portability of Specialized Equipment

Equipment purchased by a district school board with ISA funding is portable and moves with the student from school to school or from board to board. District school boards must use the ISA Status Form (**Appendix B)** to facilitate this process. The student's sending board does not get reimbursed by the ministry for the $800, although boards may make an agreement to reimburse the $800 to the sending board. However, the student's receiving board will be responsible for any shipping or handling costs associated with the transfer of equipment.

Equipment purchased previously under the provisions of the ministry's former Personalized, Special Instructional Equipment (PSIE) program may remain the property of the board unless the board opts to transfer the equipment with the student.

Specialized equipment for individual students purchased by school authorities in children's hospitals through the equipment claim process is portable. As with specialized equipment purchased with ISA Level 1 funding in district school boards, specialized equipment purchased by a school authority in a children's hospital will move with the student to another board or another school authority.

School authorities in children's hospitals will use a separate form, to be provided by the Ministry of Education, to facilitate equipment tracking.

Ministry of Health and Long-Term Care Assistive Devices Program

The Ministry of Health and Long-Term Care's (MOHLTC) Assistive Devices Program (ADP) provides partial funding to individuals for some equipment intended **for use primarily in the home**. By its nature, some of this equipment is portable and, therefore, can be used at both home and school. Cost-sharing arrangements are encouraged and may be claimed when the boards' share surpasses $800 for the student in the school year. Where a duplicate piece of equipment is needed because it is not portable between home and school, the board may submit a claim for the duplicate piece of equipment used at school.

An ISA claim may not be made for the portion of the equipment cost eligible for funding assistance under ADP. For further information about the ADP please contact the MOHLTC - ADP through the blue pages of your local telephone directory.

ISA Level 2 and ISA Level 3

Approach for 2001–02 and 2002–03

Over the spring and summer of 2001, the ministry and its education partners will work to refine the ISA Level 2 and Level 3 eligibility profiles. Starting in the fall of 2001, and ending October 31, 2002, school boards will establish a new baseline of eligible files by completing a comprehensive audit of ISA files.

After a new baseline of eligible files is established, boards will claim only new files each year. The intended effect is to reduce the annual administrative effort required in future years.

While the baseline is being established, boards will receive stable ISA funding in 2001-02 (the final amount of ISA Level 2 and 3 funding allocated in 2000–01, adjusted for portability). Boards will also receive increased funding through enhancements to student-focused funding in 2001-02, which boards can use to address cost pressures for supports for students with special needs. The stable funding approach will be reviewed for the 2002–03 school year.

For a more detailed outline of the future direction of ISA Level 2 and 3 funding, see **Appendix E**.

ISA Level 2 and Level 3 Portability

To help ensure that boards' funding matches their relative share of high needs students, ISA funding is adjusted when a student for whom a claim was filed in the 2000 ISA audit moves between boards. Portability will adjust each board's ISA Level 2 and 3 allocation to reflect the transfer of ISA files among school boards.

To facilitate the portability of ISA funding, the Ministry of Education will assign an ISA number to each student for whom an ISA Level 2 and or Level 3 claim was made in the 2000 audit and to each student for whom a new claim is made.

ISA Numbers

Beginning in the spring of 2000–01, the Ministry of Education will assign numbers for identification purposes to students for whom an ISA claim was submitted in 2000. The ministry will also assign numbers for new files claimed in the comprehensive review beginning in 2001–02.

The ministry will ensure that the assignment of these numbers is done in coordination with the Ontario Education Number (OEN) system of student numbers that is currently being established by the ministry.

To support the portability process for 2001–02, each board will receive a spreadsheet listing students claimed for ISA Level 2 and Level 3 in 2000–01. This list will correspond to the ISA claims list used by boards and the ministry in the 2000 ISA audit, with the addition of ISA numbers for each claim.

To apply for portability funding, each board is required to fill out a form, provided by the ministry, identifying, by ISA number, each student for whom an ISA Level 2 and 3 claim was made in 2000 who came from another board and has enrolled in the board as of October 31, 2001. Boards will have to obtain the ISA number for each of the new students from their sending boards. The Ministry of Education will not provide these numbers.

Boards will submit the completed form, including the ISA numbers, to the ministry.

- For the 2001–02 school year, claims are due November 2001.

The Ministry of Education will adjust boards' final ISA Level 2 and 3 allocations, using the receiving boards' validation rate in 2000, to reflect portability. To give boards an opportunity to identify any errors affecting their allocation, the ministry will provide each board with a portability funding summary, including a list of ISA numbers for incoming and outgoing students, and the portability adjustment to their ISA Level 2 and 3 allocations.

The portability adjustment formula will remain the same as used in the past two school years:

[(net gain or loss ISA level 2 students x $12,000) + (net gain or loss of ISA Level 3 students x $27,000)] x receiving board validation rate in 2000

Portability adjustments will be made to all boards to reflect the portability claims, regardless of whether the affected boards submitted a claim.

The Ministry of Education will issue the portability forms that will be used in the claim process in the spring of 2001.

ISA Level 4

As in past years, guidelines for ISA Level 4 will be issued by the ministry in a separate document for the 2001–02 school year.

Special Incidence Portion (SIP)

Continuing in 2001–02, school boards may apply to their Ministry of Education district office for funding through the Special Incidence Portion (SIP), for students who have extraordinarily high needs related to their disabilities for staff support to ensure the safety of themselves or others in the classroom.

Where approved, the ministry will grant up to a maximum of an additional $27,000 per student.

Beginning in 2001–02, there will be both a fall and a spring cycle of SIP claims, which will be incorporated as part of the board's regular budget cycle.

The spring cycle of SIP claims will allow boards to reapply for funding for additional staff supports in 2001–02, for students who received SIP funding in the 2000–01 school year. Boards may also apply for funding for students in 2001-02 for whom additional staff supports were provided after the fall application process in 2000.

The fall cycle of SIP claims will allow boards to apply for funding for additional staff supports for students who have been provided with additional staff supports beginning in 2001-02 (new claims).

Eligibility Criteria for SIP

Safety

School boards may bring forward SIP applications on behalf of students who require more than two full-time staff for the safety of the applicant student or other students. Typically, this additional support will be provided by a teaching or behavioural assistant.

The student may be enrolled in either a self-contained or an integrated/resource withdrawal setting to be eligible for SIP.

Staff Support

SIP is intended to offset incremental staff costs for a student who already has at least two full-time staff providing intensive support according to the formula outlined in the staff support worksheets (**Appendix A**).

Where the total support level is more than 2.0 FTE, an amount of funding calculated under the following formula may be made available to an eligible student up to a maximum of an additional $27,000 per student.

The following formula determines the level of funding for each approved student.

Total staff support level FTE _____
(determined through staff support worksheet formula at time of application)

(_____ total staff support FTE - 2.0) x $27,000 = _____

Funding for approved SIP claims may not exceed $27,000.

For example:

If the total staff support level FTE required to maintain the safety of the student or others in the classroom was 2.5, the formula would be applied as follows:

(2.5 – 2.0) x $27,000 = $13,500 (amount of funding available through SIP)

Please note that in this calculation the board is required to have two full-time (FTE) staff persons **prior to** submitting an application for additional funding for support staff. SIP is intended to cover the cost of intensive staff support beyond 2.0 staff, up to a cost of $27,000.

What's New in SIP Funding

Beginning in 2001–02, there will be two regular SIP application cycles that will flow funding to boards as part of the regular board budget cycle.

Documentation Required

Each new application for SIP will be reviewed by ministry and board staff.

A SIP claim form (**Appendix C**) must be filled out and submitted to the district office on behalf of the student.

In all cases, the following documents must be updated for the current school year.

1. Individual Education Plan (IEP) with specific learning goals identified.
2. A report card confirming that an IEP has been prepared for all appropriate subjects/courses.
3. Staff Support Worksheet (details provided below).

In addition, the following should be prepared by the board for review.

- A current description and assessment of the behavioural issues of the student that have led the board to submit a SIP claim. Where relevant, a description of the safety risks the student may pose to other classmates or to self should be included.
- A management/instruction plan for behaviour modification. Please note that staff should be under the supervision of a psychologist or psychiatrist for the plan to be considered adequate.
- Cost projections for implementation of the plan.
- A description of interministerial involvement in the overall intervention plans for the student (for example, children's treatment centre contact, other services purchased and in place for the student that are funded by other ministries, transitional plans if the student is at the secondary school level).
- Timetables for the staff assigned to the student.

For students for whom an ISA claim was made in 2000–01, documents gathered in the development of a student's ISA claim (including the appropriate assessments, staff timetables, IEPs, and report cards) should also be brought forward for ministry review. (In 2001–02, most students found eligible for SIP funding will have been claimed under ISA Level 3 in 2000–01.)

Boards may also put forward SIP claims on behalf of the students who were not claimed in 2000–01 but who would otherwise meet the SIP criteria. For students for whom an ISA claim was not made in 2000–01, documents gathered in the development of the student's Identification, Placement, and Review Committee (IPRC), including the appropriate assessments and staff timetables, should also be brought forward at the review meeting.

Steps for All Students Claimed District office staff will schedule a review meeting within two weeks of board contact regarding the SIP applications.	
Steps for Renewals in 2001–02 of SIP Claims Approved in 2000–01 Applications made on behalf of students who received SIP funding in 2000-01 will be reviewed by the Ministry of Education district office. **May 28, 2001:** Boards will submit SIP applications for students enrolled in the board in 2000–01, for support staff for the 2001–02 school year. District office staff will forward a summary of SIP applications to Special Education Project staff. **June 2001**: District office staff will hold a meeting to review SIP applications, following which SIP claims will be approved or rejected and the board notified of the decisions. Boards may forward rejected applications to Special Education Project staff for reconsideration. **June 29, 2001**: Boards include estimated additional funding, as per the approved SIP applications, in their 2001–02 Estimates to student-focused funding.*	**Steps for New Claims in 2001–02** New SIP applications will be reviewed by Special Education Project and district office staff. **November 15, 2001:** Boards will submit SIP applications for students enrolled in 2001–02. School board staff should forward two copies of each SIP application to the district office by courier at least ten days in advance of the review meeting. District office staff should courier one copy of each SIP application to the Special Education Project staff members who will be participating in the review meeting. **December 2001**: District office staff will hold a meeting with Special Education Project and Education Finance Branch staff to review SIP claims, following which SIP applications will be approved or rejected and the board of notified of the decisions. **December 15, 2001**: Boards include estimated additional support staff costs, as per the new SIP applications, in their 2001–02 Revised Estimates.**

New SIP applications for the current school year (2000-01) can be made in the spring cycle. These claims will follow the spring cycle timeline and the fall cycle (new claim) instructions.

Renewals that were rejected may be resubmitted, as per the new claim instructions.

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* Subject to confirmation of submission deadlines for Estimates for the 2001–02 student-focused funding cycle.

** Subject to confirmation of submission deadlines for Revised Estimates for the 2001–02 student-focused funding cycle.

Boards are reminded that regardless of the outcome of their SIP applications, all special education students should receive the services and supports outlined in their IEPs.

Staff Support Worksheets

As part of each SIP claim, boards are required to complete an accurate Staff Support Worksheet that details the level of support being offered to the student.

Accompanying the Staff Support Worksheet should be a timetable. Timetables will prove useful to board staff in calculating support for the Staff Support Worksheet for each claim and to ministry staff reviewing the SIP claim.

There is a Staff Support Worksheet for each of the following:

- students in integrated or integrated/resource withdrawal programs;
- students in self-contained settings;
- students who are deaf, blind, or deaf-blind in integrated/resource withdrawal; and
- students who are deaf, blind, or deaf-blind in self-contained settings.

Time spent by teaching and behavioural assistants, child and youth workers, and other equivalent classroom assistants can be included on the worksheets, provided that these staff are spending regularly scheduled time with students. Staff counted in the Staff Support Worksheets must be spending at least ten percent of the student's instructional hours during a week with the student, on a regularly scheduled basis, for the entire school year.

The Staff Support Worksheets should not include time spent by professional supports. In most instances, professional supports are provided on a consulting basis over a limited number of sessions with the student, varying in frequency over the year. Only in exceptional circumstances, where the board can document that a student's program includes a significant level of regular interactions (exceeding a total of ten percent of instructional hours during a week) that continue over the school year, can these supports be included in the worksheets.

If small group interaction is part of the student's plan, the time that the student spends with other students can be counted as part of the claimed level of support, as long as the support person is in attendance.

Time spent by special education teachers may also be counted as intensive support for students in self-contained classrooms or resource withdrawal arrangements.

Classroom teacher time can be counted as intensive support only where the teacher is a special education teacher:

- in a self-contained classroom or
- providing resource withdrawal.

Teacher time in a regular classroom is not counted in the calculation of intensive support in integrated settings, because funding for the teacher's salary is generated through the Foundation Grant.

Appendix A: Staff Support Worksheets for Special Incidence Portion(SIP)

Staff Support Worksheet 1: Integrated or Integrated/Resource-Withdrawal Program Setting

Staff Support Worksheet 2: Self-Contained Program Setting

Staff Support Worksheet 3: Programs for Deaf, Blind or Deaf-Blind Students in Integrated or Integrated/Resource Withdrawal Settings

Staff Support Worksheet 4: Programs for Deaf, Blind or Deaf-Blind Students in Self-Contained Settings

Staff Support Worksheet for 2001–02

Staff Support Worksheet 1 - Integrated or Integrated/Resource-Withdrawal Program Setting

Student Information

School Mident Number: _____

Last Name: _____ First Name: _____ Panel: Elementary ☐ Secondary ☐

Date of Birth: _____ (Day Month Year) FTE ☐ (0.5 for JK and K) (1 for other grades) Sex: Male ☐ Female ☐

ISA Claim Status (for information purposes only, not required)

Was an ISA Level 2 or 3 claim submitted for the student in 2000-01?	Yes	☐	No	☐
If yes, ISA # (assigned by the ministry)				
For which profile was a claim submitted?	Profile #			
Which ISA level did the student match?	ISA 2	☐	ISA 3	☐

Integrated or Integrated/Resource-Withdrawal Program Setting

The following information is to be completed based on the program currently provided to this student at the time of application. Treat JK/Kindergarten claims as full-time students for calculation purposes.

		(*2 Decimals*)
Enter FTE of TA specifically dedicated to this student on Line 1*	Line 1	

If additional resources are provided to this student in a resource-withdrawal program:

Enter number of students in the resource-withdrawal program this student attends on Line 2**	Line 2	
Enter percentage of time this student spends in the resource-withdrawal program (please state percentage as a decimal: e.g. 25% is 0.25) on Line 3	Line 3	
Enter (Line 3/Line2) X 2.5 on Line 4	Line 4	
Enter (Line 1 + Line 4) on Line 5	Line 5 TOTAL	

* In integrated classes where the TA supports more than one special needs student, pro-rate the share of TA's support for each student (for example, if a TA supports two students equally the FTE for the student claimed on this form would be 0.5). Time spent by both teacher and behavioural assistants, child and youth workers, and other equivalent classroom assistants can be included on the worksheet, provided that those staff are spending regularly scheduled time with students.

**Note: resource withdrawal time can be counted as intensive support only where the teacher is a special education teacher.

Certification

I certify that the information contained in this document is a true reflection of the program provided to the student at the time of application.

_____ _____ _____

Name of board official completing this form | Date | Signature of board official

Staff Support Worksheet for 2001–02

Staff Support Worksheet 2 - Self-Contained Program Setting

Student Information

School Mident Number:

Last Name: _____ First Name: _____

Panel: Elementary / Secondary

Date of Birth: _____ (Day Month Year)

FTE (0.5 for JK and K) (1 for other grades)

Sex: Male / Female

ISA Claim Status (for information purposes only, not required)

Was an ISA Level 2 or 3 claim submitted for the student in 2000-01?	Yes		No	
If yes, ISA # (assigned by the ministry)				
For which profile was a claim submitted?	Profile #			
Which ISA level did the student match?	ISA 2		ISA 3	

Self-Contained Program Setting

The following information is to be completed based on the program currently provided to this student at the time of application. Treat JK/Kindergarten claims as full-time students for calculation purposes.

		(2 Decimals)		*(2 Decimals)*
Enter number of students in the self-contained class on Line 1	**Line 1**			
Enter FTE of teacher in the self-contained class on Line 2*	**Line 2**			
Enter (Line 2/Line 1) X 2.5 on Line 3			**Line 3**	
Enter FTE of TA(s) in the self-contained class on Line 4**	**Line 4**			
Enter (Line 4/Line 1) on Line 5			**Line 5**	
Enter (Line 3 + Line 5) on Line 6			**Line 6**	
			Line 7	**-0.1**
Enter Line 6 - 0.1 (Line 7) on Line 8***			**Line 8 TOTAL**	

* "FTE in the class" means the share of a teacher in that class (not pro-rated to the student claimed). For example, if there is 1 teacher to the class, the FTE in Line 2 would be 1.0. Special note should be made that classroom teacher time can be counted as intensive support only where the teacher is a special education teacher.

** Time spent by both teaching and behavioural assistants, child and youth workers and other equivalent classroom assistants can be included on the worksheet, provided that those staff are spending regularly scheduled time with students.

"FTE in the class" means the share of TA's time in that class (not pro-rated to the student claimed). For example, if there are 2 TA's assigned fulltime to the class, the TA FTE in line 4 would be 2.0.

***The -0.1 corresponds to the share of the Foundation Grant that supports the teacher in the self-contained setting.

Certification

I certify that the information contained in this document is a true reflection of the program provided to the student at the time of application.

Name of board official completing this form _____ Date _____ Signature of board official _____

Staff Support Worksheet for 2001–02

Staff Support Worksheet 3 -
Programs for Deaf, Blind or Deaf-Blind Students in Integrated or Resource Withdrawal Settings

Student Information

School Mident Number

Last Name: _____ First Name: _____

Panel: Elementary / Secondary

Date of Birth: _____ FTE

Day Month Year (0.5 for JK and K) (1 for other grades)

Sex: Male / Female

ISA Claim Status (for information purposes only, not required)

Was an ISA Level 2 or 3 claim submitted for the student in 2000-01? Yes / No

If yes, ISA # (assigned by the ministry)

For which profile was a claim submitted? Profile #

Which ISA level did the student match? ISA 2 / ISA 3

Programs for Deaf, Blind or Deaf-Blind Students in Integrated or Resource Withdrawal Settings

The following information is to be completed based on the program currently provided to this student at the time of application. Treat JK/Kindergarten claims as full-time students for calculation purposes.

Enter percentage of time the specialist teacher of the deaf, blind or deaf-blind spends with this student on Line 1	Line 1	
Enter (Line 1 X 2.5) on Line 2	Line 2	*(2 Decimals)*
Enter FTE (2 Decimals) of TA dedicated to this student* on Line 3	Line 3	*(2 Decimals)*
Enter FTE (2 Decimals) of interpreter or other professional supports provided to this student as per PPM 76C* on Line 4	Line 4	
Enter (Line 4 X 1.5) on Line 5	Line 5	
Enter (Line 2 + Line 3 + Line 5) on Line 6	Line 6 TOTAL	

* Line 3 includes TA's as well as child and youth workers and other equivalent classroom assistants. If a transcriber spends more than 10 percent of regularly scheduled time supporting this student, the time may be included in Line 3.
Report other professional support on Line 4.

Certification

I certify that the information contained in this document is a true reflection of the program provided to the student at the time of application.

Name of board official completing this form | Date | Signature of board official

Staff Support Worksheet for 2001–02

Staff Support Worksheet 4 -
Programs for Deaf, Blind or Deaf-Blind Students in Self-Contained Settings

Student Information

		School Mident Number:		
Last Name: _____	First Name: _____	Panel:	Elementary	
			Secondary	
Date of Birth: _____ FTE		Sex	Male	
Day Month Year	(0.5 for JK and K) (1 for other grades)		Female	

ISA Claim Status (for information purposes only, not required)

Was an ISA Level 2 or 3 claim submitted for the student in 2000-01?	Yes		No	
If yes, ISA # (assigned by the ministry)				
For which profile was a claim submitted?	Profile #			
Which ISA level did the student match?	ISA 2		ISA 3	

Programs for Deaf, Blind or Deaf-Blind Students in Self-Contained Settings

The following information is to be completed based on the program currently provided to this student at the time of application. Treat JK/Kindergarten claims as full-time students for calculation purposes.

Enter number of students in the self-contained class on Line 1	Line 1			
		(2 Decimals)		
Enter FTE (2 Decimal) of specialist teacher of the deaf, blind or deaf-blind in the self-contained on Line 2	Line 2			
Enter (Line 2 /Line 1) X 2.5 on Line 3			Line 3	
		(2 Decimals)		
Enter FTE (2 Decimal) of TA's in the self-contained class on Line 4*	Line 4			
Enter (Line 4/Line 1) on Line 5			Line 5	
		(2 Decimals)		
Enter FTE (2 Decimal) of interpreter or other professional supports provided to this student as per PPM76C on Line 6**	Line 6			
Enter (Line 6 X 1.5) on Line 7			Line 7	
Enter (Line 3 + Line 5 + Line 7) on Line 8			Line 8	
			Line 9	-0.1
Enter Line 8 - 0.1 (Line 9) on Line 10***			Line 10 TOTAL	

*Line 4 includes TA's as well as child and youth workers and other equivalent classroom assistants. If a transcriber spends more than 10 percent of regularly scheduled time supporting this class, the time may be included in Line 4.
**Report other professional supports on Line 6.
***The -0.1 corresponds to the Foundation Grant that supports the teacher in the self-contained setting.

Certification

I certify that the information contained in this document is a true reflection of the program provided to the student at the time of application.

Name of board official completing this form	Date	Signature of board official

Appendix B: ISA Status Form

Special Education Intensive Support Amount
The purpose of this form is to assist boards when students transfer from one board to another.

Student Information

Student Name: _____ ISA Number: _____
(Assigned by ministry)

School: _____

Identification: 9 Yes 9 Dual 9 No

Exceptionality: _____

Board Information

Board: _____ Board Number: _____

Address:

_____

Board Contact Person: Phone: E-mail:

_____

ISA Information

Specialized Equipment (ISA eligible):

List of ISA Level 1 Equipment	Cost	Serial No.	Date Purchased by Board	*if shared

ISA Level 2, 3, 4 Status (indicate list of support personnel by level by FTE applicable):

ISA Level 2 (FTE)	ISA Level 3 (FTE)	ISA Level 4	Delivery Plan Description (as per IEP)	Date of Initial Application

Signature of Principal:

9 Original/Date: _____ 9 Transfer Date: _____

Original: OSR

Appendix C: Special Incidence Portion Application Form 2001–02

School Number	Panel	Student Name Last First	M/F	Date of Birth dd/mm/yy	Staff Support Weight (calculated at time of application)
Type of Placement		Was a 2000–01 ISA Level 2 or 3 claim made?		If yes:	
				ISA Number (provided by ministry)	ISA Profile

PROJECTED SIP STAFF SUPPORT WEIGHT CALCULATION

Total staff support level on Staff Support Worksheet = _____

(_____ staff support level - 2.0) x $27,000 = _____

OTHER SUPPORTS IN PLACE FOR THE STUDENT

Equipment (List)	
Board Professionals/Paraprofessional providing support	
Transportation Arrangements	
Services Provided by Other Ministries	
Building/Classroom Accommodation(s)	

_____	_____	_____
Name of board official completing form	Date	Signature of board official

Appendix D: Ministry District Offices

Barrie District Office
Mearl Obee
District Manager
20 Rose Street, 2nd Floor
Barrie ON L4M 2T2
Tel: (705) 725-7627
1-800-471-0713

London District Office
Gerry Townsend
District Manager
Suite 207
217 York Street
London ON N6A 5P9
Tel: (519) 667-1440
1-800-265-4221

North Bay/Sudbury District Office
Paul Menard
District Manager
North Bay Site
Suite 211
447 McKeown Avenue
North Bay ON P1B 9S9
Sudbury Site
Suite 203
199 Larch Street
Sudbury ON P3E 5P9
Tel: (705) 474-7210
1-800-461-9570

Ottawa District Office
Gérald Hurtubise
District Manager
Suite 504
1580 Merivale Road
Nepean ON K2G 4B5
Tel: (613) 225-9210
1-800-267-1067

Thunder Bay District Office
Carlana Lindeman
District Manager
Suite 336
435 James Street South
Thunder Bay ON P7E 6S9
Tel: (807) 475-1571
1-800-465-5020

Toronto and Area District Office
Rosemary Gannon
District Manager
880 Bay Street, 2nd Floor
Toronto ON M7A 1N3
Tel: (416) 325-6874
1-800-268-5755

Appendix E: Future Direction for ISA Level 2 and 3 Claim Process

In response to the concerns raised by its education partners, the Ministry of Education began consulting with its education partners about ongoing improvements to ISA funding and the claims review process in 2001-02 and future years.

To facilitate this consultation, the ministry established an ISA working group in November 2000. The working group includes representatives of provincial associations of trustees, supervisory officers, senior business officials, the Minister's Advisory Committee on Special Education, and the Ontario Parents Council. Recently, a member of the Provincial Parent Association Advisory Committee on Special Education Advisory Committees (PAAC on SEAC) was added to the ISA working group.

The ministry has announced a multi-year strategy to improve the ISA funding approach, based on the recommendations of the ISA working group.

Implementation Direction	Explanation
ISA eligibility criteria will be refined and implementation supports will be developed.	Clarified ISA eligibility criteria and implementation supports will be ready for use in the 2001–02 claim process.
Eligible files in 2000 will be used as a base from which to build a comprehensive baseline of files.	To do this, the ministry will add as many files to the baseline as possible, while ensuring appropriate accountability by: C "Grandparenting" validated files (files audited and found eligible in 2000). C Adding files claimed in 2000, but not audited, to the baseline, where the board's validation rate is above a threshold. The board's prior claims and validation rate will be reviewed and claims added to the "grandparented" baseline, profile by profile (so that a board's total claimed files for a specific profile will be added to the baseline if the board's validation rate for that profile was above the threshold validation rate). The validation rate threshold will be established based on a statistically valid model that ensures equitable treatment of boards.

Implementation Direction	Explanation
A comprehensive audit of new files will be completed from September 2001 to October 31, 2002.	In summer 2001, the ministry will release new ISA eligibility criteria and new implementation supports to boards for use in the comprehensive audit (the September 2001 to October 31, 2002 claim and audit process). In August 2001, the ministry will complete intensive training of auditors and board staff for the comprehensive audit. Using the refined ISA eligibility criteria, boards will submit the following files to add to their baseline of eligible files: C files never claimed before, and C files claimed in prior years that were not found eligible in the starting base of eligible files in 2000. All boards will complete this claim process by October 31, 2002. ISA funding for the 2003–04 school year will be "live" for all boards. This will establish a comprehensive new baseline of eligible files for all boards. This in turn will allow the ministry to adjust the ISA allocation in 2003–04 to reflect a true base of incidence.
Boards will be able to resubmit claims from 2000.	Boards may resubmit a claim if: C the claim was audited in 2000 and rejected, or C the claim was submitted in 2000 as an ISA 3 claim, audited, and accepted as an ISA 2 claim.
Provide stable funding over 2001–02.	The ministry will provide stable ISA funding to boards for 2001–02 and will provide an increase to student-focused funding in 2001–02 that boards can use flexibility to address service pressures. The ministry will review the stable funding approach for 2002–03, in consultation with boards and associations.

Implementation Direction	Explanation
The allocation approach for all boards in 2003–04 will be adjusted to reflect a true base of incidence of eligible files.	After completion of the new baseline, the ministry will consult with boards and provincial associations about the impact of funding boards based on their demonstrated level of ISA-eligible files. The ministry will review this funding impact and develop options, if necessary, addressing the whole allocation for special education (including SEPPA). As part of the announcement of funding for 2003-04 (in spring 2003), "live" ISA funding results for boards for 2003–04 will be confirmed, based on the amount of funding generated by their new baseline.
After 2003–04, only new files will be audited each year.	Subsequent files in future years will be added for new eligible files only, net of eligible files that leave each board. "New files" are any files not in the baseline of eligible files. Examples: files that have never been claimed or files that have been found ineligible in the past but could be re-submitted due to a change in a student's characteristics.

Appendix F: Results of the 2000 Claim and Audit Process

Purpose

This paper analyses data collected from submissions by school boards for Intensive Support Amount (ISA) funding for the 2000–01 school year.

The information in this paper will:

- support the ministry's consideration of ongoing improvements to funding for special education in future years, and
- help school boards assess their particular ISA results in the context of provincial trends.

ISA Submissions in 2000

As in 1998 and 1999, boards submitted files for ISA funding in 2000. Each file included data indicating:

- the needs relevant to the ISA eligibility of the student for whom a claim was being submitted;
- whether the file was claimed in the 1999–2000 ISA process;
- the intensive staff supports the board provided for the student during the 1999–2000 school year; and
- the grade, age, and sex of the student.

Eligibility was determined using a set of profiles for different exceptionalities. These profiles were based on the recommendations of the Expert Panel for the refinement of ISA eligibility criteria (which reported in December 1998). Files included information about the extent to which the student met a specific profile.

As in past years, boards' submissions were audited by external validators with special education qualifications, under contract to the ministry for this purpose. **Attachment 1** outlines the ISA claim process.

As part of the ongoing refinement of the Special Education Grant, the ministry expanded validator training for the ISA claim process in 2000 to ensure greater consistency in audit practices and to ensure inter-rater reliability.

The audit took place in May and June 2000 and the ministry received claim results in June and July 2000. Analysis of claim data and determination of funding results were undertaken in the summer and funding results were released to boards in August.

The analysis of results in this paper includes comparisons of three years of ISA audit and review data – 1998 (the first year of the Special Education Grant), 1999, and 2000.

Funding for ISA in 2000–01 is based on school boards' results over three years. The allocation method for the 2000–01 school year is explained in **Attachment 2** of this paper.

Toronto District School Board

This paper sets out results for all school boards **except** the Toronto District School Board (TDSB). The TDSB provided only a partial submission of claims for 2000–01. Use of this partial information as submitted would distort comparisons with prior years' results.

Because of the size of the student population in the TDSB, the elimination of this partial data from TDSB would also significantly distort reporting of results for 2000.

To allow comparability of results, this paper adopts a number of approaches with respect to the TDSB data.

- For demographic data, including age, sex, and staff support weight data, the TDSB information from the 2000–01 claim submission is used.
- For aggregate nondemographic data, including claims and eligible files, the average results of all other boards are substituted for the TDSB results.
- In data about the number of boards in a given category, TDSB is omitted.

Definitions

For clarity, it is important to note distinctions among some specific terms.

ISA claims are submissions of specific students' files that school boards put forward for review of eligibility for ISA funding.

Validated ISA files are files that were claimed by boards and audited by the ministry's validators and found to meet eligibility criteria for ISA funding.

Eligible ISA files are the board's files that were determined to be eligible for ISA funding. In most boards, ministry validators audited a sample of ISA claims. The approval rate of the validated ISA files was applied to the total number of ISA claims, to determine the total number of eligible files.

Except where noted otherwise, eligible ISA files for ISA Level 2 include files where the school board submitted a file as matching ISA Level 3 criteria and the validators determined that the file met ISA Level 2 criteria. A file claimed as a Level 3 but validated as a Level 2 is called an ***adjusted ISA Level 2 file***.

Results in 2000

Distribution of ISA Claims

The proportion of student enrolment that school boards put forward as ISA claims has increased from year to year.

	1998	1999	2000
Number of claims	28,726	29,886	31,615
Claims as a percentage of enrolment	1.47%	1.52%	1.60%

	# of boards*
Boards that put forward **more** claims in 2000 than in 1999	36
Boards that put forward **fewer** claims in 2000 than in 1999	35

* Excludes Toronto DSB

There was variability concerning the ***extent*** to which boards put forward more or fewer files. Some boards put forward many more or many fewer files; other boards made slight changes.

Most boards that would have received less funding through the 2000-01 audit than through the 1999–2000 audit process also claimed fewer files relative to enrolment, on average, than boards that received more funding in 2000–01.

The proportion of student enrolment that meets ISA eligibility criteria has been consistent.

	1998**	1999	2000
Number of eligible claims	24,919	22,487	23,126
Eligible claims as a percentage of enrolment	1.28%	1.15%	1.17%

	1998**	1999	2000
Approval Rates (number of eligible claims/number of claims)	86.5%	75.2%	73.1%

** 1998 eligible files include conditional approvals

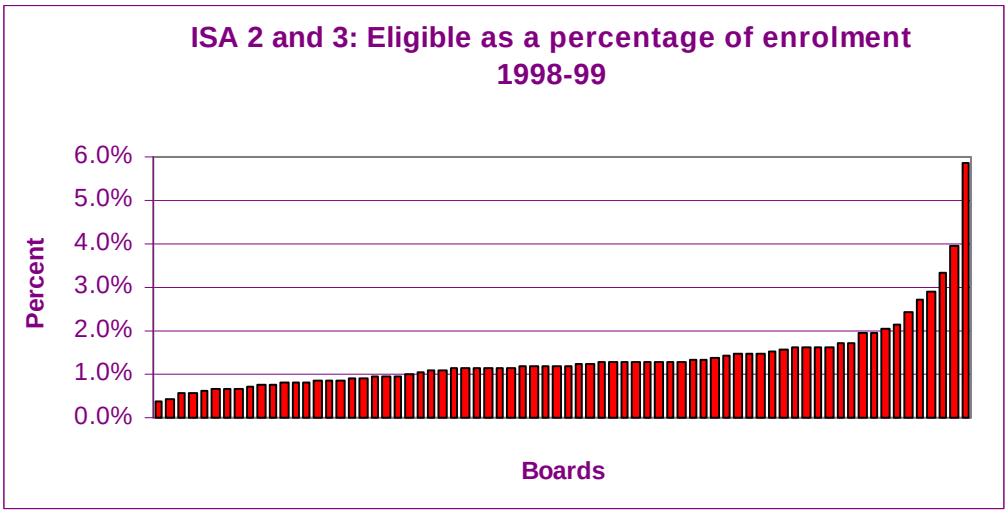
Strict comparisons between 1998 and the other years is not possible because the 1998 approval rates included conditional approvals. In 1998, because the ISA process was new, validators gave conditional approval to incomplete files where available documentation supported eligibility. Conditional approvals were not granted in 1999 or 2000.

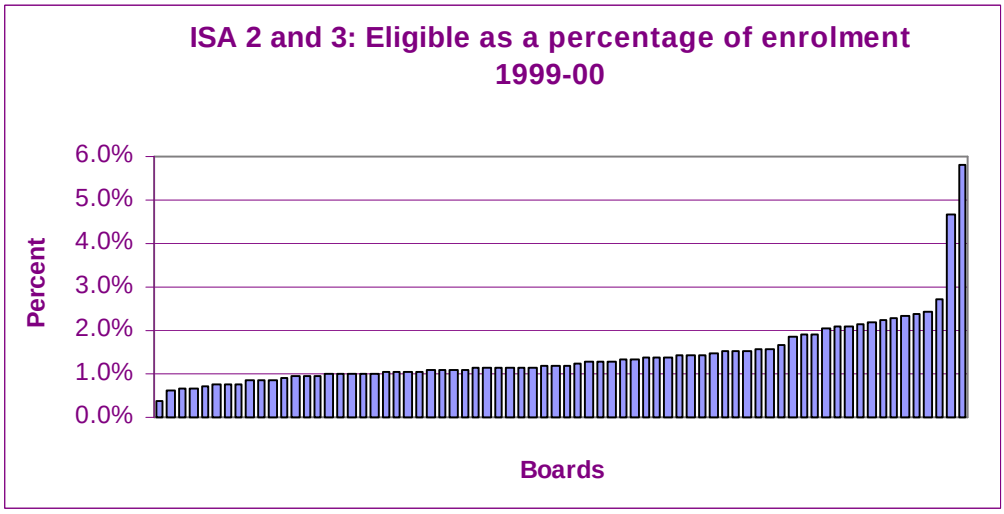
Thirty-eight boards had lower approval rates year over year (a lower rate in 1999 than in 1998, and a lower rate in 2000 than in 1999).

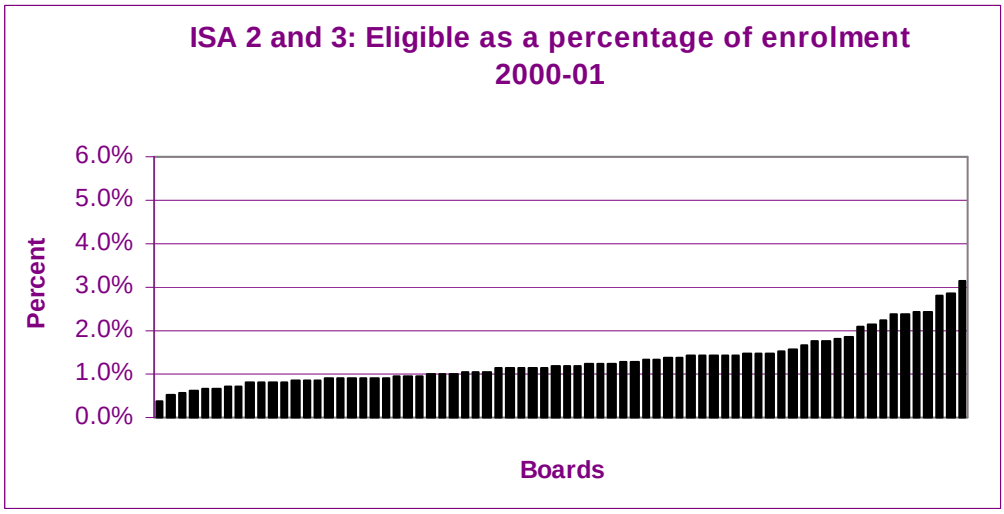
There continues to be a significant variance in the proportion of ISA eligible files in different boards.

ISA 2	1998	1999	2000
Highest proportion of eligible files, as a percentage of board's enrolment	5.11%	3.69%	1.94%
Lowest proportion of eligible files, as a percentage of board's enrolment	0.12%	0.18%	0.18%

ISA 3	1998	1999	2000
Highest proportion of eligible files, as a percentage of board's enrolment	2.65%	2.11%	1.54%
Lowest proportion of eligible files, as a percentage of board's enrolment	0.18%	0.19%	0.17%


ISA 2 and 3: Eligible as a percentage of enrolment
1998-99
6.0%
5.0%
4.0%
3.0%
2.0%
1.0%
0.0%
Percent
Boards


ISA 2 and 3: Eligible as a percentage of enrolment
1999-00
6.0%
5.0%
4.0%
3.0%
2.0%
1.0%
0.0%
Percent
Boards


ISA 2 and 3: Eligible as a percentage of enrolment
2000-01
6.0%
5.0%
4.0%
3.0%
2.0%
1.0%
0.0%
Percent
Boards

As in each of the two previous cycles of ISA claims and audit, the results in 2000 continue to show that boards have different incidences of files that meet ISA eligibility criteria. Since ISA funding is designed to meet the cost of providing supports to students with very high needs, this means that boards have varying costs for special education programs that are not strictly proportional to total enrolment.

In 2000, the range of variability narrowed significantly. This “flatter” distribution is because a few boards with extremely high proportions of eligible students showed lower results. Once again, this result is likely due to greater consistency in the auditing of files.

In 2000, a higher proportion of claims was found eligible at the ISA Level 2 than in previous years.

	1998	1999	2000
Number of eligible ISA 2 claims	11,286	11,724	14,466
Number of eligible ISA 3 claims	13,574	10,763	8,660

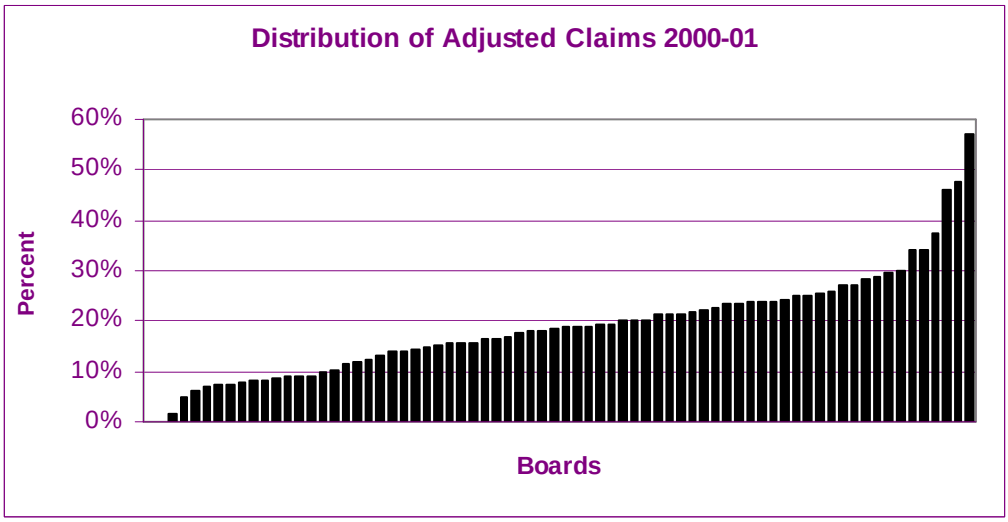
	1998	1999	2000
Percentage of eligible ISA claims that are ISA 2	45.4%	52.1%	62.6%
Percentage of eligible ISA claims that are ISA 3	54.6%	47.9%	37.4%

This result is due in part to a change in the proportion of ISA Level 2 and 3 claims submitted by boards. In 1999, 52 percent of claims were submitted as ISA 2. In 2000, this proportion increased: 60 percent of claims were submitted as ISA Level 2.

This result is also due to implementation of eligibility criteria. In 1999, some ISA validators recorded ISA Level 3 claims as eligible for ISA Level 2 if they met only ISA Level 2 criteria, but this practice was not followed consistently. For the 2000–01 claim process, validators were explicitly directed to move claims to the ISA Level 2 if they met only ISA Level 2 criteria. This significantly increased the number of adjusted claims.

There is variability among boards in the extent to which ISA Level 3 claims were adjusted to ISA Level 2. The highest proportion of adjusted claims is 57.1 percent (adjusted ISA 3 audited claims/ISA 3 audited claims); the lowest proportion of adjusted claims is 1.8 percent. Almost all boards (70) had adjusted claims.

	1999	2000
Number of ISA 3 claims eligible for ISA 2	226	938
Percentage of ISA 3 claims eligible for ISA 2	5.9%	19.2%



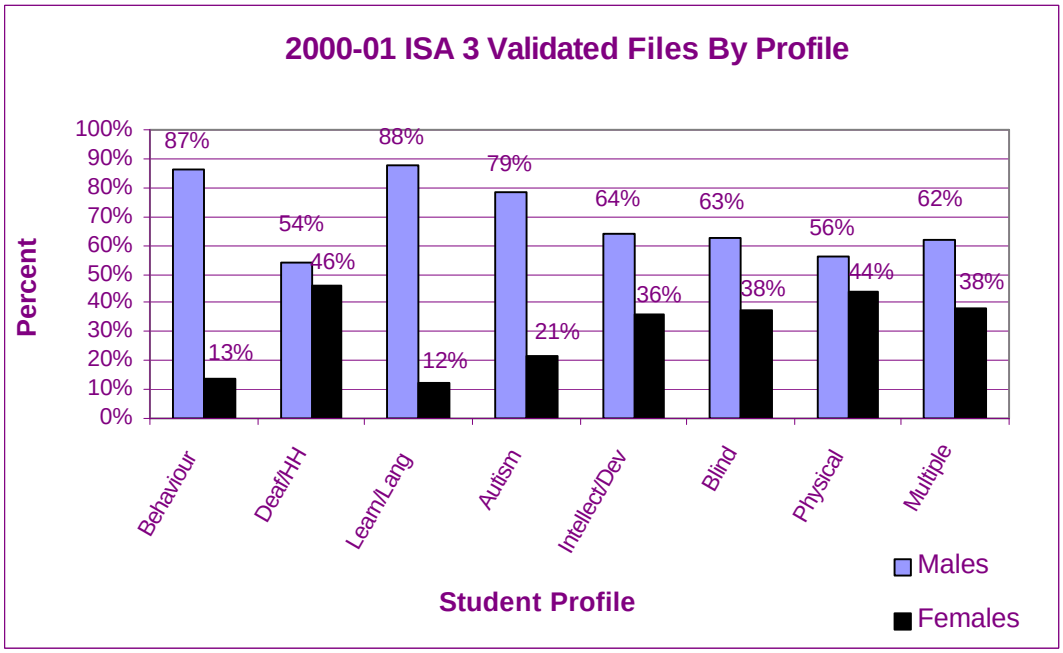
There is a wide variance in the distribution of students among different eligibility profiles. This pattern is consistent with results from previous years

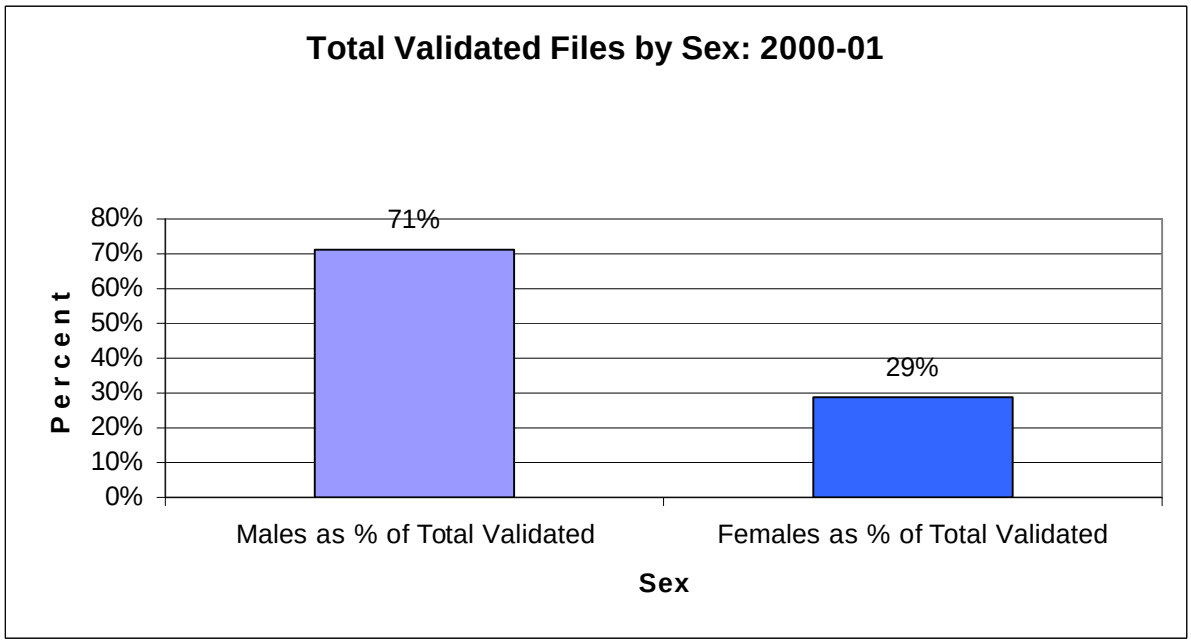
ISA Level 2 - Eligible files as percentage of Enrolment		
1.2	Behaviour	10.8%
2.2	Deaf/hard of hearing	2.6%
3.2	Learning/language	10.2%
4.2	Autism/PDD	6.1%
7.2	Developmental/intellectual	14.0%
8.2	Blind/low vision	0.3%
9.2	Physical/medical	3.0%
10.2	Multiple exceptionality	5.6%

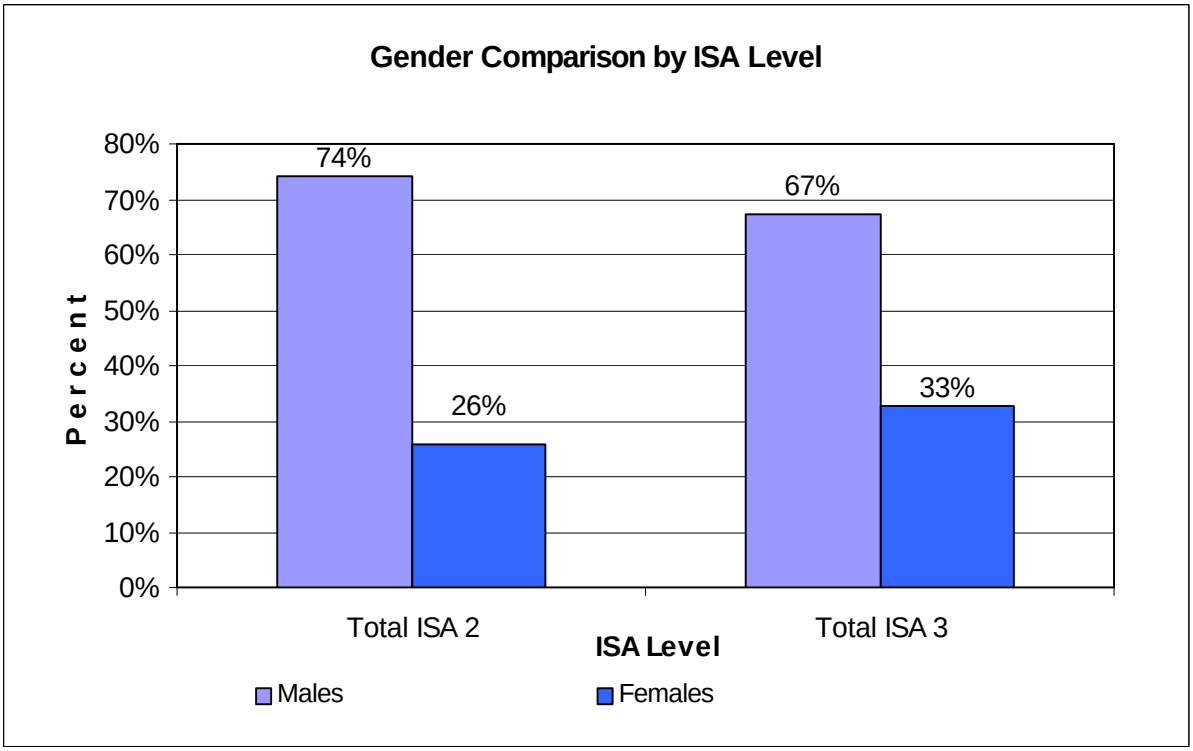
ISA 3 - percentage of files validated in 2000		
1.3	Behaviour	6.4%
2.3	Deaf/hard of hearing	2.8%
3.3	Learning/language	1.6%
4.3	Autism/PDD	6.0%
7.3	Developmental/intellectual	8.1%
8.3	Blind/low vision	1.2%
9.3	Physical/medical	6.0%
10.3	Multiple exceptionality	15.3%

Strict comparison of this data with previous years' data is not possible due to a change in the sampling methodology used in 2000. The file samples taken in 2000 were stratified in large boards to ensure a representative number of claims from each profile. Previous years' samples were not stratified.

More boys than girls meet ISA eligibility criteria.







The above graphs show the sex distribution of validated students (files audited and validated).

- 71 percent of validated claims were submitted on behalf of boys.
- 74 percent of validated ISA Level 2 claims were submitted on behalf of boys.
- 67 percent of validated ISA Level 3 claims were submitted on behalf of boys.

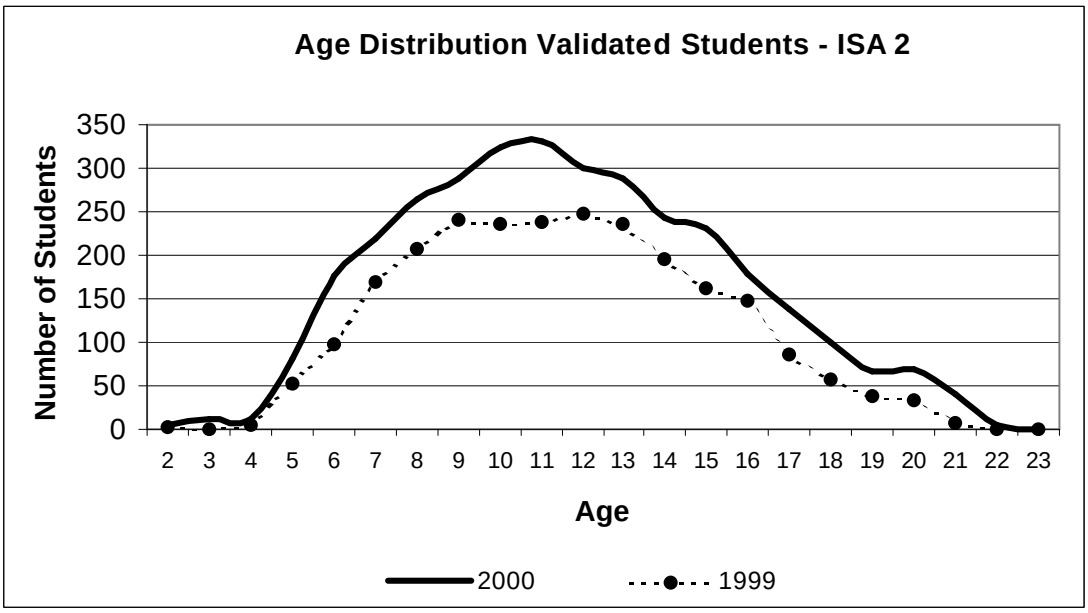
In every profile, for both ISA Level 2 and 3, more files are submitted on behalf of boys than on behalf of girls. This differential is smallest for profile 2.3, deaf/hard of hearing, and greatest for profiles 1.2, behaviour, and 3.3, learning/language disabilities.

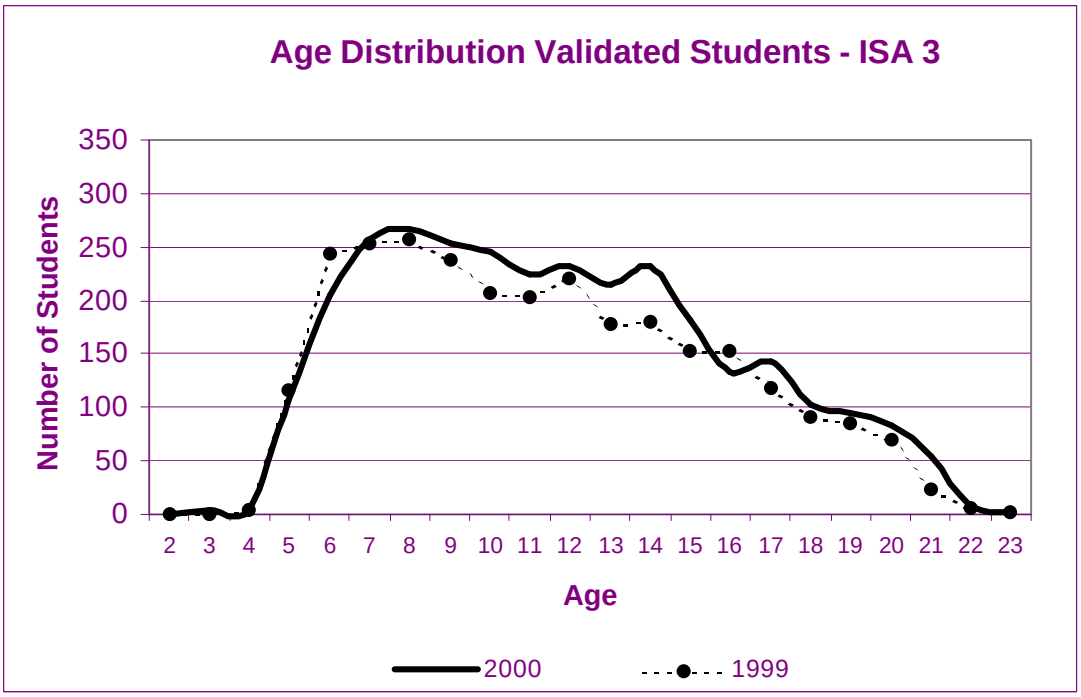
These results are consistent with results from 1999.

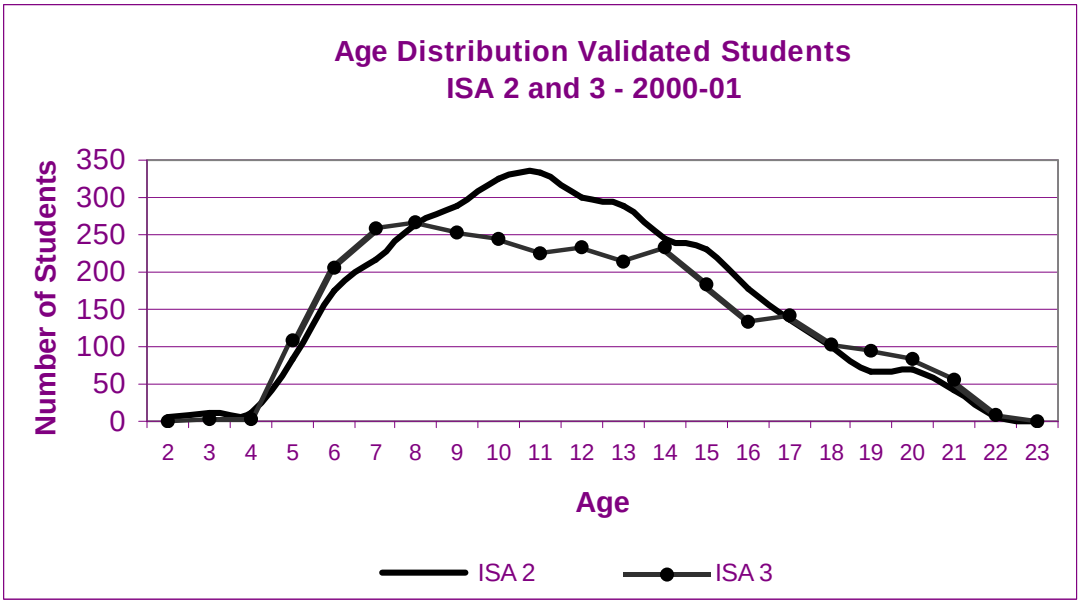
In 2000, on average, the students for whom ISA Level 2 claims are submitted and the students for whom ISA Level 3 claims are submitted are the same age.

	1999	2000
Average age of students for whom an ISA Level 2 claim was submitted and found eligible	11.57	11.71
Average age of students for whom an ISA Level 3 claim was submitted and found eligible	11.38	11.72

The graphs below show the age distribution of validated files (files audited and found eligible). The total number of students is higher in 2000 because the total number of files audited and validated was greater in 2000. However, the distribution of students by age for ISA Level 2 over the two years is similar.







The key pattern to note is that, in both years, the distribution of ISA Level 3 files shows a slightly higher proportion of younger students.

In 2000–01, the number of ISA Level 2 students peaks at age 11. In 2000–01, the number of ISA Level 3 students peaks at age 8.

Staff Supports

As part of the claim process, boards submitted information about the level of intensive staff support provided to claimed students in the classroom. This information was reported as a ***staff support weight (SSW)***.

- A SSW captures information about incremental supports from teaching assistants, special education teachers, and other non-teaching staff providing frequent and regular supports in the classroom.
- As a result, a SSW also represents levels of incremental expenditure for staff supports in the classroom.
- A SSW of 1.0 is equivalent to one full-time teaching assistant, or 40 percent of a special education teacher, dedicated to student for whom an ISA claim was submitted.

SSW data indicates a close match between current ISA Level 2 and 3 funding levels and the cost of supports provided to students.

There is a small shortfall in ISA Level 2 funding when compared to staff supports provided. This is balanced by over-funding of ISA Level 3 relative to staff supports provided.

Students for whom ISA claims are validated and found eligible are receiving significant levels of staff support.

Average SSW for all validated files in 2000 (total ISA)	0.71

This finding confirms the importance of providing funding to respond to the needs of students who require intensive staff support. The average SSW of 0.71 is equivalent to an estimated $19,170 for per-student incremental costs of special education teachers and non-teaching staff in the classroom.

Staff supports for eligible ISA Level 2 files are lower than for eligible ISA Level 3 files.

	ISA 2	ISA 3
Average SSW (validated files in 2000)	0.57	0.86

This finding confirms the validity of using two levels of ISA funding. On average, students meeting ISA Level 2 criteria are receiving less support than students meeting ISA Level 3 students. Overall, the SSW reflects boards' decisions about levels of support required,* and thus the level of students' needs.

There is significant variability in staff support levels for different profiles.

Average SSW by profile (validated files in 2000)	ISA 2	ISA 3	Total
1. Behaviour	0.52	0.73	0.60
2. Deaf/hard of hearing	0.82	0.92	0.87
3. Learning/language	0.45	0.74	0.49
4. Autism/PDD	0.66	0.86	0.76
7. Developmental/intellectual	0.56	0.72	0.62
8. Blind/low vision	1.15	1.76	1.65
9. Physical/medical	0.68	0.86	0.83
10. Multiple exceptionality	0.64	0.91	0.84

This finding suggests strongly that different exceptionalities require, on average, different levels of support.

Overall, eligible ISA files have higher staff supports than rejected files.

This finding reflects in part the eligibility requirement of a threshold for intensive staff supports for some profiles. For example, claims made under profile 2.3 (deaf/hard-of-hearing) and under profile 8.3 (blind/low vision) must meet an eligibility requirement for intensive staff supports.

These findings confirm that ISA eligibility profiles identify students who require intensive staff supports in the classroom, and that ISA funding is linked to a board's proportion of students with high needs who require costly supports.

Even though eligible claims have higher SSW than rejected claims, the data provided by boards confirms that students who do not meet ISA eligibility criteria are also receiving intensive supports.

The Special Education Grant is designed with the recognition that most students with special needs do not require intensive staff supports. The ISA process is intended to

* It should be noted that some profiles have eligibility criteria that include a minimum level of staff support: students with blindness and hearing impairments, students with physical or medical conditions, and students with multiple exceptionalities.

provide funding for staff supports in response to boards' incidence of students with very high needs. Some students that do not meet ISA eligibility criteria also have high needs, but funding for special education gives boards the flexibility they need to support all students.

- The Special Education Per Pupil Amount (SEPPA) of the Special Education Grant is intended to provide flexible funding to allow boards to provide programs and supports for all their special education students.

- Changes to ISA funding for the 2000–01 school year also recognize the need to provide flexibility. Boards receive ISA funding as part of their total special education allocation and can use this funding to adjust programs and supports for all students with high needs.

The costs of the intensive staff support component for students in self-contained programs are lower than costs for students integrated into regular classrooms.

This finding indicates that, on average, the incremental costs of staff supports in self-contained programs are lower than in integrated programs in regular classrooms.

A caution about this finding, however, should be noted. These relative SSWs may not reflect the relative costs of the program types.

- The SSWs quantify only the incremental costs of teachers and non teaching staff supports in the classroom.

- There are other costs associated with self-contained programs, notably higher transportation costs.

It is not possible at this time to provide a comprehensive evaluation of the relative costs of these alternative program types.

Summary Tables:

The following tables showing board-by-board ISA results for three years (except where noted):

Table 1:	Eligible claims: numbers
Table 2:	Eligible claims: percentage of enrolment
Table 3:	Number of claims submitted
Table 4:	Three-Year Validation and approval rates
Table 5:	Adjusted Files: ISA Level 3 to ISA Level 2

Table 1: 2000–01 ISA Analysis – Eligible Claims

DSB No.	District School Board (DSB) Name	1998–99			1999–2000			2000–01		
		1998–99 ISA 2 Eligible Students	1998–99 ISA 3 Eligible Students	Total ISA Eligible Students	1999–00 ISA 2 Eligible Students	1999–00 ISA 3 Eligible Students	Total ISA Eligible Students	2000–01 ISA 2 Eligible Students	2000–01 ISA 3 Eligible Students	Total ISA Eligible Students
02	Algoma DSB	72	139	211	148	139	288	106	86	192
55	Algonquin and Lakeshore Catholic DSB	51	65	116	72	62	134	75	41	115
08	Avon Maitland DSB	176	155	331	107	125	232	138	86	224
07	Bluewater DSB	163	144	307	179	152	331	144	119	263
51	Brant Haldimand Norfolk Catholic DSB	48	59	107	39	55	94	51	38	89
35	Bruce-Grey Catholic DSB	24	24	48	9	33	42	24	46	70
52	Catholic DSB of Eastern Ontario	107	99	205	119	87	206	171	66	236
64	CSD catholique Centre-Sud	40	40	80	25	54	79	59	45	104
65	CSD catholique de l'Est ontarien	17	43	60	46	90	136	61	90	151
62	CSD catholique des Aurores boréales	2	10	12	21	12	33	1	1	2
60.1	CSD catholique des Grandes Rivières	21	61	82	39	72	111	79	55	134
66	CSD catholique du Centre-Est de l'Ontario	28	85	113	166	143	309	217	119	335
61	CSD catholique du Nouvel-Ontario	28	25	53	46	39	85	21	21	42
60.2	CSD catholique Franco-Nord	11	40	51	18	43	62	22	33	55
63	CSD des Écoles catholiques du Sud-Ouest	23	32	55	34	32	66	36	41	77
59	CSD des écoles pub de l'Est de l'Ont	36	17	53	37	20	57	48	25	73
58	CSD du Centre Sud-Ouest	30	22	52	10	11	21	22	24	45
57	CSD du Grand Nord de l'Ontario	33	67	100	57	46	104	34	29	63
56	CSD du Nord-Est de l'Ontario	15	12	27	12	10	22	16	15	31
22	DSB of Niagara	193	379	571	234	229	462	265	124	389
01	DSB Ontario North East	107	80	187	91	105	196	87	84	171
43	Dufferin-Peel Catholic DSB	165	286	451	196	285	481	374	182	556
45	Durham Catholic DSB	117	193	310	127	86	213	230	76	306
13	Durham DSB	366	493	858	429	374	803	656	283	940
23	Grand Erie DSB	305	225	529	216	152	367	161	133	294
09	Greater Essex County DSB	240	173	412	314	244	558	378	147	525
46	Halton Catholic DSB	99	125	224	125	135	260	125	113	238
20	Halton DSB	167	307	474	168	196	363	412	155	568
47	Hamilton-Wentworth Catholic DSB	161	255	416	130	158	289	188	134	322
21	Hamilton-Wentworth DSB	221	287	508	356	259	615	457	265	723
29	Hastings and Prince Edward DSB	143	168	311	298	177	475	344	125	469
36	Huron-Perth Catholic DSB	15	24	39	27	39	65	40	25	65
31	Huron-Superior Catholic DSB	17	24	41	15	32	47	17	27	44
14	Kawartha Pine Ridge DSB	197	164	361	170	253	423	263	132	395
05.1	Keewatin-Patricia DSB	64	76	140	79	76	155	44	57	101
33.2	Kenora Catholic DSB	8	26	34	12	11	23	7	7	14
06.1	Lakehead DSB	110	76	186	164	143	306	180	80	259
10	Lambton Kent DSB	174	157	331	148	174	322	182	158	340
27	Limestone DSB	102	168	270	139	194	333	185	220	404
38	London District Catholic School Board	148	70	218	143	91	234	134	67	201

DSB No.	District School Board (DSB) Name	1998–99			1999–2000			2000–01		
		1998–99 ISA 2 Eligible Students	1998–99 ISA 3 Eligible Students	Total ISA Eligible Students	1999–00 ISA 2 Eligible Students	1999–00 ISA 3 Eligible Students	Total ISA Eligible Students	2000–01 ISA 2 Eligible Students	2000–01 ISA 3 Eligible Students	Total ISA Eligible Students
04	Near North DSB	30	68	97	100	111	212	78	64	142
50	Niagara Catholic DSB	83	185	267	96	196	292	148	128	277
30.2	Nipissing-Parry Sound Catholic DSB	54	55	109	41	60	101	40	51	91
30.1	Northeastern Catholic DSB	9	37	46	10	47	57	50	34	85
33.1	Northwest Catholic DSB	11	6	17	9	6	15	11	6	17
53	Ottawa-Carleton Catholic DSB	118	192	310	206	145	351	195	138	332
25	Ottawa-Carleton DSB	561	415	976	636	262	898	502	170	672
19	Peel DSB	426	395	820	582	448	1,030	611	234	845
41	Peterborough V.N.C. Catholic DSB	130	117	247	125	114	239	183	89	272
03	Rainbow DSB	61	105	165	94	99	194	144	61	205
05.2	Rainy River DSB	23	30	53	25	20	46	18	23	41
54	Renfrew County Catholic DSB	46	80	125	39	86	126	58	53	111
28	Renfrew County DSB	75	60	134	106	59	166	62	20	82
17	Simcoe County DSB	288	201	488	471	300	771	247	207	454
44	Simcoe Muskoka Catholic DSB	88	71	159	125	90	215	135	91	226
39	St. Clair Catholic DSB	90	97	187	80	106	187	96	79	175
32	Sudbury Catholic DSB	17	14	31	23	29	52	37	14	51
34.2	Superior North Catholic DSB	45	7	52	12	7	19	16	4	20
06.2	Superior-Greenstone DSB	4	35	39	6	23	29	6	12	18
11	Thames Valley DSB	571	332	902	682	536	1,218	516	393	909
34.1	Thunder Bay Catholic DSB	29	23	52	42	59	101	67	47	114
40	Toronto Catholic DSB	635	588	1,223	484	585	1,069	562	277	840
12	Toronto DSB *	1,876	3,587	5,464	801	1,193	1,995	2,283	1,578	3,861
15	Trillium Lakelands DSB	96	169	265	153	131	284	192	138	329
26	Upper Canada DSB	308	287	595	445	315	760	595	249	844
18	Upper Grand DSB	194	202	396	249	187	437	208	139	347
49	Waterloo Catholic DSB	173	93	266	192	99	291	145	68	213
24	Waterloo DSB	322	346	668	357	200	557	309	165	474
48	Wellington Catholic DSB	58	37	95	40	22	63	32	13	45
37	Windsor-Essex Catholic DSB	118	86	203	125	122	248	130	101	232
42	York Catholic DSB	273	330	603	232	184	416	313	133	447
16	York Region DSB	499	443	942	369	282	651	423	310	733
	Total	11,345	13,574	24,919	11,724	10,763	22,487	14,466	8,660	23,126

* Toronto DSB - Actual results are not used as TDSB provided only a partial claim. Substitute data based on average eligible claims as a percentage of enrolment multiplied by TDSB 2000–01 enrolment projection.

Table 2: 2000–01 ISA Analysis – Eligible Claims as % of Enrolment

		1998–99			1999–2000			2000–01		
DSB No.	**District School Board (DSB) Name**	1998-99 ISA 2 Eligible % of Enrol	1998-99 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol	1999–00 ISA 2 Eligible % of Enrol	1999–00 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol	2000–01 ISA 2 Eligible % of Enrol	2000–01 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol
02	Algoma DSB	0.49%	0.94%	1.43%	1.04%	0.98%	2.02%	0.77%	0.63%	1.41%
55	Algonquin and Lakeshore Catholic DSB	0.42%	0.53%	0.95%	0.58%	0.50%	1.08%	0.59%	0.32%	0.91%
08	Avon Maitland DSB	0.87%	0.77%	1.64%	0.54%	0.63%	1.16%	0.70%	0.44%	1.14%
07	Bluewater DSB	0.69%	0.61%	1.29%	0.78%	0.66%	1.43%	0.64%	0.52%	1.16%
51	Brant Haldimand Norfolk Catholic DSB	0.53%	0.64%	1.17%	0.41%	0.58%	0.99%	0.52%	0.39%	0.91%
35	Bruce-Grey Catholic DSB	0.61%	0.60%	1.21%	0.24%	0.87%	1.11%	0.64%	1.21%	1.85%
52	Catholic DSB of Eastern Ontario	0.84%	0.78%	1.62%	0.92%	0.68%	1.59%	1.27%	0.49%	1.76%
64	CSD catholique Centre-Sud	0.38%	0.38%	0.76%	0.24%	0.52%	0.76%	0.57%	0.44%	1.01%
65	CSD catholique de l'Est ontarien	0.12%	0.30%	0.42%	0.34%	0.67%	1.01%	0.46%	0.69%	1.15%
62	CSD catholique des Aurores boréales	0.36%	1.80%	2.16%	3.69%	2.11%	5.80%	0.18%	0.18%	0.36%
60.1	CSD catholique des Grandes Rivières	0.20%	0.59%	0.79%	0.41%	0.74%	1.15%	0.85%	0.59%	1.43%
66	CSD catholique du Centre-Est de l'Ontario	0.18%	0.55%	0.73%	1.12%	0.97%	2.09%	1.43%	0.78%	2.22%
61	CSD catholique du Nouvel-Ontario	0.31%	0.27%	0.58%	0.53%	0.44%	0.97%	0.25%	0.25%	0.51%
60.2	CSD catholique Franco-Nord	0.28%	1.02%	1.30%	0.50%	1.18%	1.68%	0.62%	0.90%	1.52%
63	CSD des Écoles catholiques du Sud-Ouest	0.35%	0.49%	0.84%	0.54%	0.50%	1.05%	0.57%	0.65%	1.22%
59	CSD des écoles pub de l'Est de l'Ont	0.44%	0.21%	0.65%	0.44%	0.24%	0.69%	0.54%	0.28%	0.82%
58	CSD du Centre Sud-Ouest	0.55%	0.40%	0.96%	0.18%	0.19%	0.37%	0.39%	0.43%	0.82%
57	CSD du Grand Nord de l'Ontario	1.30%	2.65%	3.95%	2.59%	2.10%	4.69%	1.52%	1.27%	2.80%
56	CSD du Nord-Est de l'Ontario	1.49%	1.21%	2.70%	1.25%	1.04%	2.29%	1.61%	1.54%	3.15%
22	DSB of Niagara	0.43%	0.85%	1.28%	0.53%	0.52%	1.04%	0.60%	0.28%	0.88%
01	DSB Ontario North East	0.98%	0.73%	1.71%	0.88%	1.02%	1.90%	0.85%	0.83%	1.68%
43	Dufferin-Peel Catholic DSB	0.22%	0.38%	0.60%	0.25%	0.37%	0.62%	0.48%	0.23%	0.71%
13	Durham DSB	0.59%	0.80%	1.40%	0.69%	0.60%	1.28%	1.04%	0.45%	1.48%
45	Durham Catholic DSB	0.48%	0.79%	1.28%	0.52%	0.35%	0.87%	0.91%	0.30%	1.22%
23	Grand Erie DSB	0.97%	0.72%	1.69%	0.69%	0.49%	1.18%	0.52%	0.43%	0.96%
09	Greater Essex County DSB	0.68%	0.49%	1.17%	0.89%	0.69%	1.58%	1.05%	0.41%	1.47%
46	Halton Catholic DSB	0.48%	0.60%	1.08%	0.58%	0.62%	1.20%	0.55%	0.50%	1.05%
20	Halton DSB	0.41%	0.75%	1.15%	0.40%	0.47%	0.88%	0.99%	0.37%	1.36%
47	Hamilton-Wentworth Catholic DSB	0.61%	0.96%	1.56%	0.48%	0.59%	1.07%	0.68%	0.49%	1.17%
21	Hamilton-Wentworth DSB	0.40%	0.52%	0.92%	0.64%	0.46%	1.10%	0.81%	0.47%	1.29%
29	Hastings and Prince Edward DSB	0.71%	0.83%	1.54%	1.49%	0.88%	2.38%	1.76%	0.64%	2.39%
36	Huron-Perth Catholic DSB	0.32%	0.51%	0.83%	0.56%	0.81%	1.37%	0.84%	0.52%	1.36%
31	Huron-Superior Catholic DSB	0.24%	0.34%	0.59%	0.22%	0.47%	0.69%	0.25%	0.40%	0.65%
14	Kawartha Pine Ridge DSB	0.49%	0.41%	0.90%	0.42%	0.63%	1.05%	0.65%	0.33%	0.98%
5.1	Keewatin-Patricia DSB	0.89%	1.05%	1.93%	1.11%	1.06%	2.17%	0.63%	0.80%	1.43%
33.2	Kenora Catholic DSB	0.80%	2.56%	3.36%	1.17%	1.07%	2.24%	0.66%	0.66%	1.33%
6.1	Lakehead DSB	0.75%	0.52%	1.27%	1.13%	0.99%	2.12%	1.26%	0.56%	1.82%
10	Lambton Kent DSB	0.60%	0.54%	1.13%	0.52%	0.61%	1.13%	0.65%	0.56%	1.21%

		1998–99			1999–2000			2000–01		
DSB No.	**District School Board (DSB) Name**	1998-99 ISA 2 Eligible % of Enrol	1998-99 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol	1999–00 ISA 2 Eligible % of Enrol	1999–00 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol	2000–01 ISA 2 Eligible % of Enrol	2000–01 ISA 3 Eligible % of Enrol	Total ISA Eligible % of Enrol
27	Limestone DSB	0.44%	0.73%	1.17%	0.61%	0.85%	1.45%	0.81%	0.97%	1.78%
38	London District Catholic School Board	0.71%	0.33%	1.04%	0.68%	0.43%	1.10%	0.63%	0.32%	0.94%
04	Near North DSB	0.21%	0.48%	0.69%	0.72%	0.80%	1.53%	0.57%	0.47%	1.03%
50	Niagara Catholic DSB	0.35%	0.79%	1.14%	0.42%	0.86%	1.28%	0.64%	0.55%	1.19%
30.2	Nipissing-Parry Sound Catholic DSB	1.44%	1.46%	2.90%	1.10%	1.60%	2.70%	1.06%	1.38%	2.44%
30.1	Northeastern Catholic DSB	0.29%	1.17%	1.46%	0.34%	1.56%	1.90%	1.71%	1.17%	2.88%
33.1	Northwest Catholic DSB	0.85%	0.42%	1.27%	0.70%	0.47%	1.17%	0.86%	0.47%	1.33%
53	Ottawa-Carleton Catholic DSB	0.33%	0.54%	0.87%	0.56%	0.40%	0.96%	0.52%	0.37%	0.89%
25	Ottawa-Carleton DSB	0.77%	0.57%	1.34%	0.88%	0.36%	1.24%	0.69%	0.23%	0.93%
19	Peel DSB	0.43%	0.39%	0.82%	0.57%	0.44%	1.00%	0.58%	0.22%	0.80%
41	Peterborough V.N.C. Catholic DSB	1.04%	0.93%	1.97%	0.97%	0.88%	1.85%	1.40%	0.68%	2.07%
03	Rainbow DSB	0.35%	0.61%	0.96%	0.58%	0.61%	1.18%	0.89%	0.37%	1.26%
5.2	Rainy River DSB	0.71%	0.91%	1.62%	0.79%	0.64%	1.43%	0.57%	0.72%	1.29%
28	Renfrew County DSB	0.60%	0.48%	1.09%	0.88%	0.49%	1.36%	0.52%	0.17%	0.68%
54	Renfrew County Catholic DSB	0.89%	1.55%	2.44%	0.76%	1.67%	2.43%	1.12%	1.02%	2.13%
17	Simcoe County DSB	0.58%	0.40%	0.98%	0.93%	0.59%	1.52%	0.48%	0.40%	0.88%
44	Simcoe Muskoka Catholic DSB	0.49%	0.39%	0.88%	0.66%	0.47%	1.13%	0.68%	0.46%	1.14%
39	St. Clair Catholic DSB	0.70%	0.75%	1.45%	0.64%	0.84%	1.47%	0.77%	0.64%	1.41%
32	Sudbury Catholic DSB	0.22%	0.18%	0.39%	0.31%	0.39%	0.71%	0.51%	0.19%	0.70%
34.2	Superior North Catholic DSB	5.11%	0.74%	5.85%	1.46%	0.85%	2.31%	1.94%	0.48%	2.42%
6.2	Superior-Greenstone DSB	0.12%	1.03%	1.15%	0.20%	0.72%	0.92%	0.19%	0.38%	0.57%
11	Thames Valley DSB	0.71%	0.41%	1.12%	0.84%	0.66%	1.51%	0.64%	0.49%	1.12%
34.1	Thunder Bay Catholic DSB	0.37%	0.29%	0.67%	0.55%	0.76%	1.31%	0.88%	0.62%	1.49%
40	Toronto Catholic DSB	0.66%	0.61%	1.28%	0.51%	0.62%	1.12%	0.59%	0.29%	0.89%
12	Toronto DSB *	0.70%	1.34%	2.05%	0.30%	0.44%	0.74%	0.78%	0.53%	1.31%
15	Trillium Lakelands DSB	0.46%	0.81%	1.26%	0.73%	0.63%	1.36%	0.93%	0.66%	1.59%
26	Upper Canada DSB	0.83%	0.78%	1.61%	1.23%	0.87%	2.09%	1.68%	0.70%	2.38%
18	Upper Grand DSB	0.60%	0.62%	1.22%	0.76%	0.57%	1.33%	0.63%	0.42%	1.05%
49	Waterloo Catholic DSB	0.79%	0.42%	1.21%	0.87%	0.45%	1.31%	0.65%	0.30%	0.95%
24	Waterloo DSB	0.59%	0.64%	1.23%	0.63%	0.35%	0.98%	0.54%	0.29%	0.83%
48	Wellington Catholic DSB	0.83%	0.52%	1.35%	0.56%	0.31%	0.87%	0.43%	0.17%	0.60%
37	Windsor-Essex Catholic DSB	0.45%	0.33%	0.78%	0.48%	0.47%	0.95%	0.49%	0.38%	0.87%
42	York Catholic DSB	0.66%	0.80%	1.46%	0.55%	0.44%	0.99%	0.71%	0.30%	1.01%
16	York Region DSB	0.62%	0.55%	1.17%	0.44%	0.34%	0.78%	0.49%	0.36%	0.85%
	Board Average	0.64%	0.72%	1.37%	0.73%	0.71%	1.44%	0.78%	0.53%	1.31%

* Toronto DSB - Actual results are not used as TDSB provided only a partial claim. Substitute data is based on average eligible claims as a % of enrolment.

Table 3: 2000–01 ISA Analysis – Number of Claims by Board

DSB No.	District School Board (DSB) Name	1998–99			1999–2000			2000–01		
		1998–99 ISA 2 Claims	1998–99 ISA 3 Claims	Total 98–99 Claims	1999–00 ISA 2 Claims	1999–00 ISA 3 Claims	Total 99–00 Claims	2000–01 ISA 2 Claims	2000–01 ISA 3 Claims	Total 00–01 Claims
2	Algoma DSB	72	139	211	212	164	376	163	111	274
55	Algonquin and Lakeshore Catholic DSB	51	65	116	66	87	153	95	119	214
08	Avon Maitland DSB	176	155	331	172	141	313	167	117	284
07	Bluewater DSB	163	144	307	205	169	374	173	152	325
51	Brant Haldimand Norfolk Catholic DSB	48	59	107	38	83	121	52	52	104
35	Bruce-Grey Catholic DSB	24	24	48	11	33	44	37	56	93
52	Catholic DSB of Eastern Ontario	107	99	205	174	95	269	206	96	302
64	CSD catholique Centre-Sud	40	40	80	44	76	120	39	112	151
65	CSD catholique de l'Est ontarien	17	43	60	90	114	204	63	146	209
62	CSD catholique des Aurores boréales	2	10	12	29	24	53	27	12	39
60.1	CSD catholique des Grandes Rivières	21	61	82	41	72	113	72	105	177
66	CSD catholique du Centre-Est de l'Ontario	28	85	113	260	261	521	228	160	388
61	CSD catholique du Nouvel-Ontario	28	25	53	100	58	158	225	77	302
60.2	CSD catholique Franco-Nord	11	40	51	31	55	86	27	52	79
63	CSD des Écoles catholiques du Sud-Ouest	23	32	55	68	33	101	38	48	86
59	CSD des écoles pub de l'Est de l'Ont	36	17	53	83	33	116	80	30	110
58	CSD du Centre Sud-Ouest	30	22	52	27	21	48	60	45	105
57	CSD du Grand Nord de l'Ontario	33	67	100	50	88	138	55	56	111
56	CSD du Nord-Est de l'Ontario	16	13	29	22	16	38	23	26	49
22	DSB of Niagara	193	379	571	265	305	570	342	154	496
01	DSB Ontario North East	107	80	187	113	108	221	124	128	252
43	Dufferin-Peel Catholic DSB	218	397	615	270	367	637	374	268	642
45	Durham Catholic DSB	78	207	285	145	86	231	225	130	355
13	Durham DSB	366	493	858	679	581	1,260	759	422	1181
23	Grand Erie DSB	305	225	529	285	174	459	195	172	367
9	Greater Essex County DSB	240	173	412	490	346	836	463	162	625
46	Halton Catholic DSB	99	125	224	125	135	260	147	139	286
20	Halton DSB	167	307	474	225	284	509	524	221	745
47	Hamilton-Wentworth Catholic DSB	161	255	416	179	257	436	244	188	432
21	Hamilton-Wentworth DSB	221	287	508	602	470	1,072	581	353	934
29	Hastings and Prince Edward DSB	143	168	311	344	177	521	425	163	588
36	Huron-Perth Catholic DSB	20	33	53	41	43	84	38	27	65
31	Huron-Superior Catholic DSB	17	24	41	17	37	54	22	31	53
14	Kawartha Pine Ridge DSB	197	164	361	183	348	531	313	195	508
5.1	Keewatin-Patricia DSB	64	76	140	86	93	179	82	99	181
33.2	Kenora Catholic DSB	21	30	51	22	32	54	21	22	43
6.1	Lakehead DSB	110	76	186	184	151	335	222	122	344
10	Lambton Kent DSB	174	157	331	236	251	487	235	211	446
27	Limestone DSB	102	168	270	139	206	345	235	232	467
38	London District Catholic School Board	148	70	218	160	91	251	204	103	307
4	Near North DSB	35	72	106	165	155	320	126	91	217

DSB No.	District School Board (DSB) Name	1998–99			1999–2000			2000–01		
		1998–99 ISA 2 Claims	1998–99 ISA 3 Claims	Total 98–99 Claims	1999–00 ISA 2 Claims	1999–00 ISA 3 Claims	Total 99–00 Claims	2000–01 ISA 2 Claims	2000–01 ISA 3 Claims	Total 00–01 Claims
50	Niagara Catholic DSB	104	222	326	97	235	332	124	198	322
30.2	Nipissing-Parry Sound Catholic DSB	54	55	109	64	62	126	63	71	134
30.1	Northeastern Catholic DSB	9	37	46	12	49	61	28	75	103
33.1	Northwest Catholic DSB	13	6	19	12	7	19	24	10	34
53	Ottawa-Carleton Catholic DSB	138	211	349	236	159	395	225	155	380
25	Ottawa-Carleton DSB	561	415	976	845	386	1,231	988	327	1315
19	Peel DSB	426	395	820	919	611	1,530	730	282	1012
41	Peterborough V.N.C. Catholic DSB	130	117	247	137	139	276	175	153	328
03	Rainbow DSB	83	114	197	107	117	224	231	164	395
05.2	Rainy River DSB	23	30	53	30	29	59	34	46	80
54	Renfrew County Catholic DSB	46	80	125	52	103	155	79	88	167
28	Renfrew County DSB	74	60	134	183	77	260	145	61	206
17	Simcoe County DSB	288	201	488	638	471	1,109	416	332	748
44	Simcoe Muskoka Catholic DSB	88	71	159	125	90	215	141	96	237
39	St. Clair Catholic DSB	90	97	187	125	144	269	108	104	212
32	Sudbury Catholic DSB	27	17	44	3	53	56	217	82	299
34.2	Superior North Catholic DSB	45	7	52	33	12	45	18	14	32
06.2	Superior-Greenstone DSB	4	38	42	14	41	55	10	25	35
11	Thames Valley DSB	571	332	902	727	536	1,263	805	487	1292
34.1	Thunder Bay Catholic DSB	29	23	52	49	68	117	61	68	129
40	Toronto Catholic DSB	751	668	1,419	697	696	1,393	660	359	1019
	Toronto DSB *	3,484	4,974	8,458	1,160	2183	3,343	3,071	2,410	5,481
15	Trillium Lakelands DSB	118	192	310	159	131	290	214	161	375
26	Upper Canada DSB	308	287	595	511	375	886	727	382	1109
18	Upper Grand DSB	194	202	396	290	199	489	246	231	477
49	Waterloo Catholic DSB	173	93	266	277	121	398	205	110	315
24	Waterloo DSB	322	346	668	515	226	741	354	216	570
48	Wellington Catholic DSB	78	37	114	65	25	90	43	14	57
37	Windsor-Essex Catholic DSB	118	86	203	151	154	305	202	164	366
42	York Catholic DSB	273	330	603	257	224	481	340	184	524
16	York Region DSB	650	520	1,169	387	288	675	555	371	926
	Total	**13,373**	**15,353**	**28,726**	**15,555**	**14331**	**29,886**	**18,970**	**12,645**	**31,615**

* Toronto DSB - Actual results are not used as TDSB provided only a partial claim. Substitute data is based on average claims as a % of enrolment multiplied by the 2000–01 enrolment projection.

Claims are identified as ISA Level 2 or ISA Level 3 as submitted by boards.

Table 4: 2000–01 ISA Analysis – Three-Year Validation and Approval Rates

		1998–99 *			1999–2000			2000–01		
DSB No.	**District School Board (DSB) Name**	ISA 2 Validation Rate	ISA 3 Validation Rate	Total Approval Rate **	ISA 2 Validation Rate	ISA 3 Validation Rate	Total Approval Rate ****	ISA 2 Validation Rate	ISA 3 Validation Rate ***	Total Approval Rate ****
2	Algoma DSB	100.0%	100.0%	100.0%	68.0%	85.0%	76.5%	54.4%	77.8%	70.2%
55	Algonquin and Lakeshore Catholic DSB	100.0%	97.1%	100.0%	100.0%	70.7%	87.5%	35.7%	34.2%	53.9%
08	Avon Maitland DSB	100.0%	100.0%	100.0%	62.2%	88.9%	74.2%	65.7%	73.3%	78.9%
07	Bluewater DSB	97.3%	100.0%	100.0%	87.2%	90.0%	88.5%	71.2%	78.0%	80.9%
51	Brant Haldimand Norfolk Catholic DSB	96.0%	96.7%	100.0%	80.0%	66.7%	77.9%	74.2%	73.8%	85.9%
35	Bruce-Grey Catholic DSB	100.0%	100.0%	100.0%	81.8%	100.0%	95.5%	56.0%	81.3%	75.0%
52	Catholic DSB of Eastern Ontario	100.0%	100.0%	100.0%	66.0%	92.0%	76.6%	73.8%	68.3%	78.3%
64	CSD catholique Centre-Sud	100.0%	100.0%	100.0%	47.8%	71.4%	65.8%	64.3%	40.3%	68.6%
65	CSD catholique de l'Est ontarien	100.0%	100.0%	100.0%	44.1%	78.9%	66.5%	58.5%	61.8%	72.2%
62	CSD catholique des Aurores boréales	100.0%	100.0%	100.0%	62.1%	50.0%	62.3%	3.7%	8.3%	5.1%
60.1	CSD catholique des Grandes Rivières	95.2%	100.0%	100.0%	96.0%	100.0%	98.5%	70.3%	52.3%	75.8%
66	CSD catholique du Centre-Est de l'Ontario	100.0%	100.0%	100.0%	50.0%	54.9%	59.3%	82.6%	74.1%	86.4%
61	CSD catholique du Nouvel-Ontario	100.0%	100.0%	100.0%	40.5%	66.7%	53.6%	6.4%	27.6%	14.0%
60.2	CSD catholique Franco-Nord	100.0%	97.5%	100.0%	54.5%	78.4%	71.5%	52.2%	62.5%	69.3%
63	CSD des Écoles catholiques du Sud-Ouest	100.0%	100.0%	100.0%	50.0%	95.5%	64.9%	85.7%	86.2%	89.8%
59	CSD des écoles pub de l'Est de l'Ont	97.1%	100.0%	100.0%	44.4%	61.1%	49.2%	54.5%	82.1%	66.0%
58	CSD du Centre Sud-Ouest	93.3%	100.0%	100.0%	18.5%	50.0%	43.2%	25.0%	52.5%	43.2%
57	CSD du Grand Nord de l'Ontario	100.0%	97.0%	100.0%	70.4%	52.8%	75.1%	36.4%	51.1%	56.7%
56	CSD du Nord-Est de l'Ontario	94.1%	91.7%	93.0%	45.5%	62.5%	57.9%	40.9%	58.3%	63.4%
22	DSB of Niagara	97.4%	96.4%	100.0%	78.6%	75.0%	81.1%	73.8%	80.8%	78.5%
1	DSB Ontario North East	100.0%	100.0%	100.0%	77.8%	97.2%	88.5%	50.0%	66.0%	67.8%
43	Dufferin-Peel Catholic DSB	75.7%	72.2%	73.4%	70.3%	77.6%	75.5%	80.5%	67.9%	86.6%
45	Durham Catholic DSB	75.0%	93.0%	88.1%	87.7%	100.0%	92.3%	80.7%	58.8%	86.3%
13	Durham DSB	98.4%	98.9%	100.0%	57.6%	64.4%	63.7%	73.4%	67.1%	79.6%
23	Grand Erie DSB	95.6%	97.8%	100.0%	73.7%	87.1%	80.0%	71.6%	77.2%	80.0%
09	Greater Essex County DSB	100.0%	100.0%	100.0%	59.3%	70.5%	66.7%	78.8%	90.9%	84.0%
46	Halton Catholic DSB	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	69.4%	81.3%	83.3%
20	Halton DSB	96.7%	100.0%	100.0%	65.9%	68.9%	71.4%	69.4%	70.3%	76.2%
47	Hamilton-Wentworth Catholic DSB	100.0%	100.0%	100.0%	56.3%	61.7%	66.2%	62.6%	71.4%	74.6%
21	Hamilton-Wentworth DSB	97.9%	98.5%	100.0%	57.8%	55.2%	57.4%	69.4%	75.1%	77.4%
29	Hastings and Prince Edward DSB	100.0%	96.5%	100.0%	86.7%	100.0%	91.2%	75.0%	76.5%	79.8%
36	Huron-Perth Catholic DSB	75.8%	73.7%	74.5%	65.2%	90.0%	77.9%	100.0%	92.6%	100.0%
31	Huron-Superior Catholic DSB	94.1%	100.0%	100.0%	88.2%	86.1%	86.8%	64.7%	86.4%	82.7%
14	Kawartha Pine Ridge DSB	98.3%	100.0%	100.0%	85.0%	72.6%	79.6%	69.1%	67.5%	77.7%
05.1	Keewatin-Patricia DSB	97.1%	93.5%	100.0%	78.4%	81.3%	86.4%	28.2%	57.1%	55.8%
33.2	Kenora Catholic DSB	38.1%	87.1%	66.7%	45.5%	34.4%	42.6%	9.5%	31.8%	32.6%
06.1	Lakehead DSB	100.0%	100.0%	100.0%	88.9%	94.6%	91.5%	69.1%	65.2%	75.4%
10	Lambton Kent DSB	100.0%	100.0%	100.0%	62.9%	69.2%	66.1%	59.2%	75.0%	76.2%

		1998–99 *			1999–2000			2000–01		
DSB No.	**District School Board (DSB) Name**	ISA 2 Validation Rate	ISA 3 Validation Rate	Total Approval Rate **	ISA 2 Validation Rate	ISA 3 Validation Rate	Total Approval Rate ****	ISA 2 Validation Rate	ISA 3 Validation Rate ***	Total Approval Rate ****
27	Limestone DSB	100.0%	96.3%	100.0%	100.0%	94.3%	96.6%	76.8%	94.6%	86.5%
38	London District Catholic School Board	97.8%	100.0%	100.0%	89.5%	100.0%	93.3%	57.4%	65.1%	65.5%
04	Near North DSB	85.7%	95.0%	92.0%	57.8%	71.9%	66.1%	54.5%	70.0%	65.2%
50	Niagara Catholic DSB	79.5%	83.3%	82.1%	82.6%	83.6%	88.0%	78.3%	64.8%	85.9%
30.2	Nipissing-Parry Sound Catholic DSB	96.2%	97.2%	100.0%	64.3%	96.3%	80.0%	47.1%	72.2%	67.8%
30.1	Northeastern Catholic DSB	100.0%	100.0%	100.0%	75.0%	95.7%	93.3%	57.1%	45.9%	82.4%
33.1	Northwest Catholic DSB	84.6%	100.0%	89.2%	75.0%	85.7%	78.9%	37.5%	60.0%	50.0%
53	Ottawa-Carleton Catholic DSB	85.3%	90.9%	88.7%	85.2%	91.4%	88.8%	81.4%	88.9%	87.5%
25	Ottawa-Carleton DSB	95.6%	97.1%	100.0%	72.1%	67.9%	73.0%	44.5%	51.9%	51.1%
19	Peel DSB	100.0%	100.0%	100.0%	55.6%	73.3%	67.3%	78.6%	82.9%	83.5%
41	Peterborough V.N.C. Catholic DSB	92.7%	100.0%	100.0%	86.8%	81.8%	86.6%	75.0%	58.0%	82.9%
03	Rainbow DSB	73.0%	91.7%	83.8%	81.6%	84.8%	86.5%	41.4%	37.0%	51.9%
5.2	Rainy River DSB	95.2%	100.0%	100.0%	76.7%	70.4%	77.2%	20.8%	50.0%	51.2%
54	Renfrew County Catholic DSB	100.0%	97.2%	100.0%	66.7%	83.7%	81.1%	51.0%	60.0%	66.3%
28	Renfrew County DSB	97.9%	100.0%	100.0%	54.9%	76.9%	63.7%	22.7%	32.5%	39.7%
17	Simcoe County DSB	97.1%	98.0%	100.0%	60.7%	63.6%	69.5%	44.6%	62.3%	60.7%
44	Simcoe Muskoka Catholic DSB	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	92.2%	95.0%	95.3%
39	St. Clair Catholic DSB	100.0%	100.0%	100.0%	55.3%	73.7%	69.4%	70.1%	76.2%	82.4%
32	Sudbury Catholic DSB	63.0%	81.3%	70.0%	66.7%	54.7%	92.9%	9.1%	16.7%	17.0%
34.2	Superior North Catholic DSB	94.6%	100.0%	100.0%	30.3%	58.3%	42.2%	44.4%	28.6%	62.5%
6.2	Superior-Greenstone DSB	100.0%	90.9%	91.8%	46.2%	56.1%	53.6%	30.0%	48.0%	51.4%
11	Thames Valley DSB	89.8%	100.0%	100.0%	93.8%	100.0%	96.4%	57.8%	80.6%	70.3%
34.1	Thunder Bay Catholic DSB	96.8%	96.3%	100.0%	78.6%	86.5%	86.3%	82.4%	69.4%	88.7%
40	Toronto Catholic DSB	84.6%	88.0%	86.2%	64.0%	84.0%	76.8%	75.3%	77.3%	82.4%
12	Toronto DSB *****	53.9%	72.1%	64.6%	57.7%	54.7%	59.7%	59.4%	65.5%	89.9%
15	Trillium Lakelands DSB	81.5%	88.4%	85.7%	96.2%	100.0%	97.9%	82.8%	85.5%	87.8%
26	Upper Canada DSB	100.0%	100.0%	100.0%	79.7%	84.0%	85.7%	66.7%	65.2%	76.1%
18	Upper Grand DSB	94.4%	97.7%	100.0%	86.0%	94.1%	89.3%	58.1%	60.0%	72.7%
49	Waterloo Catholic DSB	100.0%	92.0%	100.0%	69.2%	82.1%	73.2%	66.0%	61.4%	67.6%
24	Waterloo DSB	100.0%	94.3%	100.0%	67.6%	88.5%	75.1%	76.2%	76.4%	83.1%
48	Wellington Catholic DSB	75.0%	100.0%	83.0%	62.2%	88.2%	69.4%	73.7%	91.7%	78.1%
37	Windsor-Essex Catholic DSB	97.0%	100.0%	100.0%	76.9%	79.4%	81.2%	47.0%	61.8%	63.3%
42	York Catholic DSB	94.9%	97.1%	100.0%	82.6%	82.2%	86.6%	79.4%	72.5%	85.2%
16	York Region DSB	76.8%	85.4%	80.6%	93.8%	97.8%	96.4%	70.8%	83.6%	79.2%
	Board Average	**93.0%**	**96.1%**	**95.7%**	**70.1%**	**79.0%**	**76.8%**	**59.4%**	**65.5%**	**70.8%**

* 1998-99 validation and approval rates include conditional approvals. Conditional approvals were discontinued in subsequent years.

** Boards that received an approval rate of equal to or greater than 95% in 1998-99 were adjusted to 100% approval rate for funding purposes.

*** Validation rates are calculated for ISA Level 2 and Level 3 separately, and are based on the reviewed sample of files. These rates do **not** include the adjustment for ISA Level 3 claims approved as ISA Level 2 claims.

**** Approval rates for 1999-2000 and 2000-01 refer to the combined rate for ISA Level 2 and Level 3. These rates **include** the adjustment of ISA Level 3 claims approved as ISA Level 2 claims.

***** Toronto DSB - Actual results for 2000-01 are not used as TDSB provided only a partial claim. The substitute data based on the average approval rate of the other 71 DSBs.

	Max	100.0%	100.0%		100.0%	100.0%		100.0%	95.0%	

Table 5: 2000–01 ISA Analysis – Adjusted Claims: ISA 3 approved as ISA 2

DSB No.	District School Board (DSB) Name	Total Reviewed ISA 3s App'd as 2	Proportion of ISA 3s App'd as 2
2	Algoma DSB	7	15.6%
55	Algonquin and Lakeshore Catholic DSB	25	34.2%
8	Avon Maitland DSB	11	24.4%
7	Bluewater DSB	7	14.0%
51	Brant Haldimand Norfolk Catholic DSB	10	23.8%
35	Bruce-Grey Catholic DSB	2	6.3%
52	Catholic DSB of Eastern Ontario	8	19.5%
64	CSD catholique Centre-Sud	23	29.9%
65	CSD catholique de l'Est ontarien	9	16.4%
62	CSD catholique des Aurores boréales	0	0.0%
60.1	CSD catholique des Grandes Rivières	12	27.3%
66	CSD catholique du Centre-Est de l'Ontario	19	17.6%
61	CSD catholique du Nouvel-Ontario	5	8.6%
60.2	CSD catholique Franco-Nord	5	15.6%
63	CSD des Écoles catholiques du Sud-Ouest	2	6.9%
59	CSD des écoles pub de l'Est de l'Ont	4	14.3%
58	CSD du Centre Sud-Ouest	6	15.0%
57	CSD du Grand Nord de l'Ontario	12	25.5%
56	CSD du Nord-Est de l'Ontario	6	25.0%
22	DSB of Niagara	6	8.2%
01	DSB Ontario North East	9	19.1%
43	Dufferin-Peel Catholic DSB	22	27.2%
45	Durham Catholic DSB	19	37.3%
13	Durham DSB	38	23.6%
23	Grand Erie DSB	7	12.3%
09	Greater Essex County DSB	7	8.0%
46	Halton Catholic DSB	8	16.7%
20	Halton DSB	26	22.0%
47	Hamilton-Wentworth Catholic DSB	21	18.8%
21	Hamilton-Wentworth DSB	26	15.4%
29	Hastings and Prince Edward DSB	8	15.7%
36	Huron-Perth Catholic DSB	2	7.4%
31	Huron-Superior Catholic DSB	2	9.1%
14	Kawartha Pine Ridge DSB	28	23.9%
05.1	Keewatin-Patricia DSB	9	21.4%
33.2	Kenora Catholic DSB	5	22.7%
6.1	Lakehead DSB	10	21.7%

DSB No.	District School Board (DSB) Name	Total Reviewed ISA 3s App'd as 2	Proportion of ISA 3s App'd as 2
10	Lambton Kent DSB	21	20.2%
27	Limestone DSB	1	1.8%
38	London District Catholic School Board	7	16.3%
04	Near North DSB	6	10.0%
50	Niagara Catholic DSB	14	25.9%
30.2	Nipissing-Parry Sound Catholic DSB	5	13.9%
30.1	Northeastern Catholic DSB	17	45.9%
33.1	Northwest Catholic DSB	2	20.0%
53	Ottawa-Carleton Catholic DSB	4	7.4%
25	Ottawa-Carleton DSB	25	19.1%
19	Peel DSB	14	13.3%
41	Peterborough V.N.C. Catholic DSB	17	34.0%
03	Rainbow DSB	16	29.6%
05.2	Rainy River DSB	9	23.7%
54	Renfrew County Catholic DSB	8	20.0%
28	Renfrew County DSB	19	47.5%
17	Simcoe County DSB	27	18.5%
44	Simcoe Muskoka Catholic DSB	2	5.0%
39	St. Clair Catholic DSB	12	19.0%
32	Sudbury Catholic DSB	14	21.2%
34.2	Superior North Catholic DSB	8	57.1%
06.2	Superior-Greenstone DSB	3	12.0%
11	Thames Valley DSB	7	10.4%
34.1	Thunder Bay Catholic DSB	9	25.0%
40	Toronto Catholic DSB	12	18.2%
12	Toronto DSB *	139	19.0%
15	Trillium Lakelands DSB	5	9.1%
26	Upper Canada DSB	19	28.8%
18	Upper Grand DSB	17	28.3%
49	Waterloo Catholic DSB	4	9.1%
24	Waterloo DSB	10	18.2%
48	Wellington Catholic DSB	0	0.0%
37	Windsor-Essex Catholic DSB	22	21.6%
42	York Catholic DSB	12	23.5%
16	York Region DSB	5	8.2%
	Total	938	18.7%

* Toronto DSB - Actual results are not used as TDSB provided only a partial claim.
Substitute data based on Avg Proportion of ISA 3s approved as ISA 2s for the other 71 Boards

Attachment 1: Method of ISA Audit and Analysis

Refinements in 2000

In 2000, refinements were made to the ISA audit implementation process to improve consistency:

- The ministry expanded training for ISA validators and introduced inter-rater reliability testing.
- The ministry improved its sampling methods and expanded the sample size, to ensure that results were more consistent.
- In 2000, the ministry audited a higher number of files to improve the statistical validity of results. In 1999, validators audited 7,420 files (25 percent of claims). In 2000, validators audited 9,768 files (31 percent of claims).
- The ministry also introduced more detailed requirements for documentation to support claims (notably concerning assessments).

These changes resulted in a more rigorous and consistent evaluation of ISA claims.

Audit Process in 2000

The ministry published the *Resource Manual for the Special Education Grant Intensive Support Amount: Guidelines for School Boards 2000–2001*. This resource manual was published in early March 2000, together with the grant regulations for school board funding in the 2000–01 school year.

The resource manual:

- explained the intent and process of the ministry's audit of ISA eligibility criteria;
- set out eligibility criteria, including a prerequisite checklist and profiles for specific exceptionalities; and
- set out a method for calculating the level of intensive staff supports.

Ministry staff travelled throughout the province in March and April, providing training to special education staff of each school board concerning the intent, process, and requirements of the audit.

In May and June, school boards used the prerequisite checklist and eligibility profiles (as published in the resource manual) to determine which students with special needs they would submit a claim for under the refined criteria. Boards could claim students only if they were enrolled in the 1999–2000 school year.

For each file submitted, boards were required to provide documentation concerning the match of the student to a specific profile. By matching students to these profiles, boards identified the students' exceptionalities and level of need (ISA Level 2 or ISA Level 3).

Using the approved ministry form, boards also indicated, for each student claimed, the level of intensive staff support received by the student in the 1999–2000 school year.

ISA validators – special education experts under contract to the ministry – audited each school board's claims.

Boards put forward claims for 31,615 students. It was not feasible or necessary to audit each file. The validators audited sufficient numbers of each board's claims to allow statistically valid conclusions. In total, 9,768 files (31 percent of the total) were audited.

In small boards, the validators audited each file: in six boards (8 percent of boards), all files were audited.

In larger boards, the validators audited a statistically valid sample of files.

Methods Used to Determine Results

To develop the analysis of results of the audit, the ministry had to:

- project results from the samples of submissions audited by the validators to the entire population of ISA files submitted by school boards, and
- adjust claims for files that would have been found eligible at a lower ISA level.

Projecting results from samples to the entire population:

In many boards, the ministry had validated data concerning only a sample of files claimed (the sample that the validators audited).

To support conclusions about the whole population of ISA files, the ministry had to use information from the audited samples to predict results for all the files submitted.

To reach conclusions about the number of eligible students, the ministry used validation rates of the audit samples for each board.

Adjusting claims for students eligible for a lower level of ISA:

In some instances, boards claimed that files met ISA Level 3 criteria, but validators noted that although they did not meet Level 3 criteria, these files would have met the ISA Level 2 criteria.

Validators were authorized to approve these files as ISA Level 2. This direction affected the number of eligible files.

Attachment 2: 2000–01 Funding Approach

The ministry has adapted its ISA funding approach for the 2000–01 school year to achieve two key objectives:

- to protect and improve programs and supports for students with special needs; and
- to ensure that funding is responsive to each board's varying share of students with very high needs.

In 1998–99, school boards received funding based on the results of the 1998 claim and audit process or on ministry projections made at the time of the announcement of student-focused funding in 1998, whichever was higher. In 1999–2000, boards received the same level of funding for ISA Levels 2 and 3 as they received in 1998–99.

For the 2000–01 school year, to ensure stability of programs, the ministry continues to provide funding for stability based on the funding results of past years. Boards are funded on the basis of their highest result in 1998, 1999, or 2000. This means that many boards are receiving funding in addition to the level generated by eligible claims in 2000.

This approach was implemented in all but five boards. These five boards had higher results in 1999 than in 2000. However, funding on the full amount of their 1999 results would have meant funding these boards in excess of 100 percent approval of their claims in 2000.

As these boards showed a higher level of need in 1999 than in 2000, as with other boards, the ministry recognized the higher level of need – but only up to the level claimed in 2000.

These five boards were funded as if their claims in 2000 had been validated at 100 percent. They have higher funding amounts in 2000–01 than they had in 1999–2000.

This 2000-01 approach to funding will generate approximately $47 million in additional ISA support for 2000–01.

ISA Level 2 and 3 Actual Funding

DSB No.	District School Board (DSB) Name	1998–99 Allocation	1999–2000 Allocation	2000–01 Allocation*
2	Algoma DSB	4,509,000	4,509,000	4,953,000
55	Algonquin and Lakeshore Catholic DSB	2,313,000	2,339,584	2,529,878
08	Avon Maitland DSB	6,097,500	6,196,500	6,097,500
07	Bluewater DSB	5,557,800	5,416,996	6,180,000
51	Brant Haldimand Norfolk Catholic DSB	2,178,000	2,178,000	2,155,500
35	Bruce-Grey Catholic DSB	910,500	870,000	1,519,140
52	Catholic DSB of Eastern Ontario	3,678,000	3,754,500	3,820,048
64	CSD catholique Centre-Sud	1,655,069	1,604,071	2,410,766
65	CSD catholique de l'Est ontarien	2,977,204	2,977,204	3,712,752
62	CSD catholique des Aurores boréales	280,500	267,000	705,000
60.1	CSD catholique des Grandes Rivières	1,869,000	1,869,000	2,936,703
66	CSD catholique du Centre-Est de l'Ontario	3,154,741	3,154,741	6,905,824
61	CSD catholique du Nouvel-Ontario	1,729,526	1,828,526	2,193,934
60.2	CSD catholique Franco-Nord	1,179,000	1,179,000	1,578,666
63	CSD des Écoles catholiques du Sud-Ouest	1,068,000	1,068,000	1,817,823
59	CSD des écoles pub de l'Est de l'Ont	1,108,728	1,108,728	1,561,422
58	CSD du Centre Sud-Ouest	1,000,500	1,026,461	1,277,000
57	CSD du Grand Nord de l'Ontario	2,007,000	2,046,722	2,133,222
56	CSD du Nord-Est de l'Ontario	498,987	498,987	753,409
22	DSB of Niagara	12,531,900	12,511,570	12,534,900
01	DSB Ontario North East	3,420,000	3,420,000	3,922,897
43	Dufferin-Peel Catholic DSB	10,199,684	10,170,006	10,253,684
45	Durham Catholic DSB	6,476,375	6,476,375	6,470,011
13	Durham DSB	17,371,500	17,772,553	17,371,500
23	Grand Erie DSB	9,684,000	9,684,000	9,715,500
09	Greater Essex County DSB	7,312,500	7,336,500	9,930,000
46	Halton Catholic DSB	4,637,250	4,583,250	5,145,000
20	Halton DSB	10,041,750	10,040,270	10,041,751
47	Hamilton-Wentworth Catholic DSB	8,776,500	8,790,000	8,803,500
21	Hamilton-Wentworth DSB	11,259,291	11,268,132	12,651,756
29	Hastings and Prince Edward DSB	6,058,500	6,155,500	8,356,600
36	Huron-Perth Catholic DSB	848,260	868,975	1,185,000
31	Huron-Superior Catholic DSB	1,032,192	1,032,192	1,040,250
14	Kawartha Pine Ridge DSB	7,008,304	7,036,553	8,859,970
05.1	Keewatin-Patricia DSB	2,800,500	2,789,093	2,988,552
33.2	Kenora Catholic DSB	714,641	696,467	714,641

DSB No.	District School Board (DSB) Name	1998–99 Allocation	1999–2000 Allocation	2000–01 Allocation*
6.1	Lakehead DSB	3,331,500	3,321,000	5,819,288
10	Lambton Kent DSB	6,385,500	6,393,000	6,471,884
27	Limestone DSB	5,820,000	5,906,314	8,143,500
38	London District Catholic School Board	3,580,500	3,675,204	4,174,895
4	Near North DSB	3,359,054	3,359,054	3,969,000
50	Niagara Catholic DSB	5,950,028	6,022,253	6,451,319
30.2	Nipissing-Parry Sound Catholic DSB	2,049,000	2,049,000	2,105,714
30.1	Northeastern Catholic DSB	1,159,500	1,200,000	1,535,919
33.1	Northwest Catholic DSB	253,507	258,841	294,000
53	Ottawa-Carleton Catholic DSB	8,582,840	8,527,110	8,616,590
25	Ottawa-Carleton DSB	21,040,010	20,899,850	21,054,610
19	Peel DSB	22,004,963	22,193,963	22,004,963
41	Peterborough V.N.C. Catholic DSB	4,708,500	4,634,417	4,708,500
03	Rainbow DSB	3,515,636	3,515,636	3,812,928
05.2	Rainy River DSB	1,081,500	1,088,858	1,081,500
54	Renfrew County Catholic DSB	2,519,700	2,456,148	2,801,767
28	Renfrew County DSB	2,481,750	2,493,611	2,875,955
17	Simcoe County DSB	9,845,562	10,003,447	13,745,722
44	Simcoe Muskoka Catholic DSB	3,074,250	3,270,750	4,079,294
39	St. Clair Catholic DSB	3,609,000	3,609,000	3,830,211
32	Sudbury Catholic DSB	1,404,886	1,404,886	1,404,886
34.2	Superior North Catholic DSB	492,000	506,318	492,000
06.2	Superior-Greenstone DSB	937,645	973,755	1,007,737
11	Thames Valley DSB	15,661,500	15,781,705	22,650,750
34.1	Thunder Bay Catholic DSB	1,334,286	1,357,458	2,094,000
40	Toronto Catholic DSB	22,977,138	22,876,202	22,977,138
12	Toronto DSB	117,140,476	117,140,476	117,140,476
15	Trillium Lakelands DSB	5,512,985	5,443,560	6,015,587
26	Upper Canada DSB	11,094,000	10,984,500	13,855,364
18	Upper Grand DSB	7,579,500	7,592,449	8,048,520
49	Waterloo Catholic DSB	4,368,000	4,353,380	4,984,838
24	Waterloo DSB	13,422,000	13,576,628	13,621,500
48	Wellington Catholic DSB	1,611,000	1,576,393	1,683,000
37	Windsor-Essex Catholic DSB	3,814,800	3,894,674	4,804,493
42	York Catholic DSB	11,998,500	12,010,051	11,998,500
16	York Region DSB	17,916,875	18,246,154	17,960,025
	Total	515,563,091	517,120,498	563,543,473

* Before adjustments for portability.