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Board Leadership Development Strategy – Version 1, June 2010
Preface

The progress and success of all students in Ontario is contingent on effective leadership at every level to guide and support teaching and learning in Ontario schools. We need effective directors, superintendents, principals and vice-principals to support excellent teachers, create outstanding schools and foster student achievement and well-being. An effective Board Leadership Development Strategy enables boards to attract and develop leaders of the highest quality to meet these objectives.

“Ontario has made significant gains in sharpening the focus on student achievement and narrowing the gap in academic performance. We need to be proud and celebrate those successes. In order to ensure that these successes continue, there needs to be a more deliberate, consistent and long-term focus on capacity building and leadership development.

At the board level there must be an understanding of the issues surrounding the attraction of qualified candidates to make sure that leadership positions in Ontario schools are filled by the best possible candidates for the job. Boards must examine their leadership development and succession practices, to make sure they adopt the best possible practices to recruit and retain the strong, effective leaders our students and our communities deserve.”

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1. Introduction

1.1 What’s New in 2010–11?

In 2010-11 all boards receiving Ontario Leadership Strategy (OLS) funding are required to develop and implement a Board Leadership Development Strategy (BLDS). The primary purpose of the BLDS is to establish a systematic approach to fostering high quality leadership throughout the organization. It is focused on improving student achievement and well-being through effective leadership and is directly aligned with and supports the provincial education priorities and the goals of the Ontario Leadership Strategy.

The BLDS enables districts to:

- **Strengthen** connectivity and synergy between leadership development and initiatives that support student achievement and well-being identified through the Board Improvement Plan for Student Achievement (section 2.1 Effective Leadership: A Supporting Condition for Student Achievement, p.5).

- **Position** leadership development as a central part of human resources management as articulated in the Board Strategic Plan. Boards will develop goals for their Board Leadership Development Strategy based on the priorities set out in their strategic plan (section 2.3 – Why a Board Leadership Development Strategy, p.7).

- **Align** leadership development initiatives including *mentoring for newly appointed school and system leaders, principal/vice-principal performance appraisal, and succession planning and talent development*. Boards will receive one funding allocation and be expected to meet a set of key requirements (section 3.1-Overview of Requirements in 2010-2011, p.10). Beyond these requirements boards have the flexibility to allocate funding to other areas of leadership development as needed.

The BLDS is targeted towards school leaders (principals/vice-principals), system leaders (supervisory officers/directors of education) and those who aspire to a leadership role. This includes both academic (e.g., school superintendent) and non-academic (e.g., business superintendent) roles. An effective BLDS will provide benefits for teachers and other board staff.
1.2 The Purpose of This Manual

The purpose of this manual is to inform school boards of the requirements for the implementation of a Board Leadership Development Strategy (BLDS) in 2010-11 and to guide BLDS planning. Directors, supervisory officers, principals, vice-principals and teachers may find the manual helpful in understanding the context and approach for leadership development in Ontario.

This manual supersedes the 2009-10 *Leadership Succession Planning and Talent Development Ministry Expectations and Implementation Continuum* and is to be used with the following supplementary materials:

- Ontario Leadership Framework (OLF);
- Mentoring for Newly Appointed School Leaders Requirements Manual;
- Principal/Vice-Principal Performance Appraisal Technical Requirements Manual;
- PPM 152 – Terms and Conditions of Employment of Principals and Vice- Principals.

Section 3 – Board Leadership Development Strategy (BLDS) outlines the specific requirements for school boards in 2010-11. An overview of responsibilities, eligible expenses and reporting is provided in Section 4 – Responsibilities, Eligible Expenses and Reporting.

A BLDS planning and reporting template, including a comprehensive implementation planning continuum, is included in Appendix C. An in-depth continuum to support mentoring for newly appointed school leaders is provided in Appendix D.

1.3 Key Partners

The Ministry’s work in developing this manual was informed by the advice of school boards and key partners representing principal, supervisory officer and director of education associations, identified in Appendix B. The work of the Institute for Education Leadership (IEL) in particular provided a foundation for this manual, through a project commissioned to identify issues faced by school boards in building a cadre of outstanding educational leaders, resulting in the 2008 *Succession Planning for Ontario Schools and School Boards* report. The report is available on the IEL’s website at: [www.education-leadership-ontario.ca](http://www.education-leadership-ontario.ca)
2. Context

2.1 Effective Leadership: A Supporting Condition for Student Achievement

Ontario’s approach to tri-level reform (provincial, district, school) has yielded measurable results in relation to the three core education priorities set out in *Reach Every Student: Energizing Ontario Education*:

- high levels of student achievement;
- reduced gaps in student achievement;
- increased public confidence in publicly funded education.

Effective leadership at the school level, among principals and vice-principals and at the system level, among supervisory officers and directors of education is recognized as a vital condition for supporting the achievement of these results. To achieve and support district-wide leadership development, directors and supervisory officers establish practices and procedures that cultivate a culture of professional learning, high expectations, and an unrelenting focus on student achievement and well-being\(^2\).

The *Board Leadership Development Strategy* works in concert with other ministry initiatives to improve the conditions for teaching and learning in Ontario schools and classrooms. Leadership is a supporting condition for the success of the *School Effectiveness Framework* and the *Board Improvement Plan for Student Achievement*. Additionally, as districts establish, support, and refine a BLDS, consideration must be given to systemic barriers that may impede fair practice with respect to hiring, mentoring, promotion, and succession planning\(^3\). To support the district in developing a BLDS, ministry documents such as the *Realizing the Promise of Diversity: Ontario’s Equity and Inclusive Education Strategy* will be influential to its success. This focus on equity and excellence is demonstrated throughout the *Board Leadership Development Planning Template and Implementation Continuum* (Appendix C).

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\(^2\) See Bill 177 for further information about the board’s responsibilities to promote student achievement and well-being.

2.2 The Ontario Leadership Strategy (OLS)

To foster strong leadership, the government launched the Ontario Leadership Strategy (OLS). The OLS is a comprehensive plan of action aimed at attracting and developing skilled and passionate school and system leaders. The strategy promotes a collaborative approach through which schools, districts, education partners, and the ministry work in partnership to support student achievement and well-being. Launched in 2008–09, the strategy has evolved and will continue to be refined through ongoing research and consultation. The strategy is enhanced each year, driven by a theory of action founded on the guiding principles of:

- **Partnership** – build on the good practices and networks already in place;
- **Individual and organizational development** – promote professional learning for school leadership and school boards;
- **Alignment** – engage all partners in learning from one another, sharing effective practices and common language, and aligning ministry initiatives;
- **Communication** – engage in dialogue and communicate a clear message that supports effective practices.

The Ontario Leadership Strategy is supported by the Ontario Leadership Framework (OLF) of effective practices, including the five Core Leadership Capacities (CLCs). The OLF, including the five CLCs can be used to support districts and individual leaders in focusing their leadership development efforts on the leadership practices, competencies and knowledge that research and evidence shows to be most effective. See Appendix A for further information.
2.3 Why a Board Leadership Development Strategy?

Ontario is dedicated to ensuring the success of each and every student. Passionate and skilled leaders are vital to achieving this commitment. A Board Leadership Development Strategy is a coordinated approach to foster the advancement of leaders of the highest quality. The Board Leadership Development Strategy is a central part of human resources management, grounded in the goals of the board’s Strategic Plan and the Board Improvement Plan for Student Achievement.

The primary purpose of the Board Leadership Development Strategy is to encourage a systematic approach to fostering high quality leadership throughout the organization. In doing so, the system encourages staff to further build leadership skills in their current role and supports their preparation should they wish to consider other leadership positions. It is essential that Ontario districts continue to refine their recruiting and talent development practices to attract, develop, and retain school and system leaders who reflect Ontario’s diversity. Through this process, districts address diversity, leadership capacity, and retention of high potential candidates, especially of under represented groups. These leadership roles are pivotal to our shared focus on student achievement and well-being, with considerable evidence indicating that:

- school leaders are second only to teachers’ classroom instruction as an influence on student learning;
- there is not a single documented case of a school successfully turning around its student achievement trajectory in the absence of talented leadership;
- widely distributed school leadership has a greater influence on schools and students;
- system leaders can positively influence student achievement;
- effective system practices are necessary to sustain successful schools.

“Planning for the management of a board’s human resources should be considered an integral part of an overall strategic planning process. Human resources management plans … must give attention to a wide range of development experiences to build readiness for leadership, provide for ongoing professional learning opportunities for current leaders, and outline diverse career paths available to those within the system.”

Currently, some school boards faced with declining student enrolment are reducing the number of leadership positions through school closures and senior administrative attrition. Some school boards are encountering challenges in filling vacant positions and recruiting teachers as principals and vice-principals. Meanwhile, other boards have a stable base of early to mid-career principals and vice-principals. Regardless of the situation, it is important for boards to provide talent development opportunities for teachers and provide their principals and vice-principals with strategic supports and professional learning so they continue to improve and remain engaged. All boards, within the context of their local circumstances, should take a long-term approach to succession planning for all leadership positions.

An organization’s most effective leaders are not just acquired, they are grown—in fact an organization has more potential leaders than it often realizes. Great leaders have a tremendous capacity to learn and need to be challenged in order to continuously grow. Leaders are powerful levers for improvement at the school and system level. The presence of strong leaders throughout the system results in an improvement and achievement driven culture, supporting staff to ensure the success of all students. However, succession planning in the public sector has often been reactionary in nature, thereby, negating the potential benefits of a more strategic approach of identifying leadership potential within the district early and cultivating perspective talent.

Leadership development is an ongoing, contextual, orderly yet innovative process to get the right people, including those that reflect Ontario’s diversity, to perceive and develop their leadership potential. The process starts before there is a vacancy to be filled. It begins early and is based on data about the future needs of the organization. Leadership talent development takes place over the cycle of an entire career, and in all roles at both the school and the system level. System planning should incorporate development opportunities for both academic and non-academic leaders.
**Succession Planning: School and School Boards**  
Report Prepared for the Institute for Education Leadership (IEL)

“The best succession planning practices are proactive … Talented individuals are identified early and nurtured throughout their careers through professional development that is integrated into human resource management.”

The IEL study on succession planning highlights a number of promising practices, including:

- Provide active support from top leadership;
- Link succession planning to strategic planning;
- Identify talent from multiple levels of an organization early in the employee’s career;
- Emphasize developmental assignments, not just formal training; offer interesting assignments that stretch and challenge;
- Address diversity, leadership capacity, and retention of high potential candidates, especially from under represented groups;
- Use succession planning to facilitate broader transformation of an organization and inspire leaders who champion change;
- Incorporate employee input as plans are developed, and assign specific responsibility within the organization for reviewing and overseeing the progress of employees.

3. Requirements: Board Leadership Development Strategy (BLDS)

3.1 Overview of Requirements in 2010–11

In 2010–11 school boards receive one funding allocation, including a base allocation and a proportional amount based on the number of administrators, including vice-principals, principals, supervisory officers and the director of education in the district to implement a Board Leadership Development Strategy (BLDS).

Boards are expected to meet the requirements outlined in this requirements manual for 2010–11 in order to receive this funding. In particular, it is expected that boards will:

- Appoint a lead for the BLDS;
  - Each board will also appoint a lead for mentoring for newly appointed school leaders and principal/vice-principal performance appraisal (depending on board context, may also appoint different people to lead mentoring and principal/vice-principal performance appraisal, however must collaborate to ensure coherence);
- Establish a BLDS Steering Committee;
- Develop a BLDS;
  - Informed by goals of the Board Strategic Plan and the Board Improvement Plan for Student Achievement;
  - Embeds the leadership practices and competencies of the Ontario Leadership Framework (OLF), including the Core Leadership Capacities (CLCs). For more information, see www.ontario.ca/eduleadership.
- Determine a BLDS Implementation Plan based on the Board Leadership Development Planning Template and Implementation Continuum⁴ (Appendix C);
- Provide mentoring for newly appointed school leaders using the Mentoring for Newly Appointed School Leaders, Requirements Manual, Version 3, June 2010 (see www.ontario.ca/eduleadership for more information);
- Support newly appointed Directors of Education and Supervisory Officers (Academic and Business) in mentoring offered by supervisory officer and director associations;
- Implement the requirements of the principal/vice-principal performance appraisal (PPA) regulation (O. Reg. 234/10) (see www.ontario.ca/eduleadership for more information);

⁴ Note: The Board Leadership Development Continuum supersedes the 2009-10 Succession Planning and Talent Development Continuum. Many of the components remain the same.
• Comply with the provisions of PPM 152 – Terms and Conditions of Employment of Principals and Vice-Principals;
• Monitor and evaluate the effectiveness of the Board Leadership Development Strategy (BLDS) and BLDS implementation plan;
• Meet all ministry reporting requirements as outlined in Section 4 – Responsibilities, Eligible Expenses and Reporting.

Beyond these requirements, boards have the flexibility to invest in other areas of the BLDS requiring attention, based on the goals and priorities identified in the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement.

3.2 BLDS Lead and Steering Committee

The director of education or designate will identify a Board Leadership Development Strategy (BLDS) Lead and BLDS Steering Committee.

The lead will coordinate the planning, implementation and monitoring of the BLDS. The BLDS Lead will represent the school board in matters related to the BLDS, for example in networking with other boards and participating in events hosted by ministry and/or key partners. The lead will ensure that ministry reporting requirements are met and participate in provincial monitoring and support activities as they take place (e.g. completion of surveys, participation in board visits, regional teleconferences). It is recommended that the board provide professional learning and resources as needed to support the lead in effectively fulfilling this role. Each board will appoint a lead for mentoring for newly appointed school leaders and principal/vice-principal performance appraisal (this may be one or more individuals depending on local board context).

The BLDS Steering Committee sets the vision and goals for the Board Leadership Development Strategy (BLDS), based on priorities set out in the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement. The Committee also takes an active role in determining the implementation plan for the BLDS based on the Board Leadership Development Planning Template and Implementation Continuum (Appendix C).

How Does It Work?

District goals for the Board Leadership Development Strategy (BLDS) are driven by the goals and priorities of the Board’s Strategic Plan and Board Improvement Plan for Student Achievement.

For example, if the data collected for the Board’s Strategic Plan shows there will be a shortage of principals and vice-principals in five years, then one of the BLDS goals for the board may be to focus on Section A: Identification and Recruitment Practices of the Board Leadership Development Planning Template and Implementation Continuum (Appendix C).

The board uses the Board Leadership Development Planning Template and Implementation Continuum (Appendix C) to determine its implementation plan for the Board Leadership Development Strategy (BLDS) based on these goals.
The BLDS Lead is a key member of the Steering Committee. The Committee will also include the board mentoring lead and the board principal/vice-principal performance appraisal lead, unless these roles are being fulfilled by the same individual. It is recommended that boards consider including members that represent a range of perspectives on the steering committee. For example, academic and non-academic perspectives, aspiring and experienced leaders, formal and informal leadership roles, diversity and equity perspectives. The Committee may also include those responsible for developing the Board Strategic Plan and Board Improvement Plan for Student Achievement.

The board may combine the BLDS Steering Committee with an existing board committee, and may identify sub-committees as required. For example, the board may establish a mentoring sub-committee to support the mentoring lead in identifying goals and overseeing the board’s mentoring implementation plan as part of the BLDS.

3.3 Board Leadership Development Strategy (BLDS)

The board will develop and communicate a Board Leadership Development Strategy (BLDS) that is driven by the goals and priorities of the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement. The Strategy will embed the leadership practices and competencies of the Ontario Leadership Framework (OLF), including the Core Leadership Capacities (CLCs).

The board is required to articulate three goals for the Board Leadership Development Strategy (BLDS) in the attached Board Leadership Development Planning Template and Implementation Continuum (Appendix C). One of the goals will relate to mentoring for newly appointed school leaders.

3.4 Board Leadership Development Strategy (BLDS) Implementation Plan

The Board Leadership Development Planning Template and Implementation Continuum (Appendix C) enables boards to develop an implementation plan to carry out the goals of their Board Leadership Development Strategy (BLDS). In developing the plan, the BLDS Steering Committee identifies the current levels of leadership development implementation based on the BLDS continuum. The continuum is derived from the succession planning domain of the Ontario Leadership Framework – Part 2:
System Practices and Procedures and the Leadership Self-Review Tool\(^5\). The continuum is divided into seven components of a leadership development strategy:

- Identification and Recruitment Practices;
- Training and Development;
- Selection Processes;
- Professional Development Opportunities;
- Placement and Transfer;
- Capacity Building;
- Board Leadership Development Plan.

The continuum can be used on an ongoing basis to identify progress, needs, and next steps.

The *Board Leadership Development Planning Template and Implementation Continuum* (Appendix C) identifies the **required** areas of focus for the Board Leadership Development Strategy (BLDS). Beyond these requirements, boards may invest in other areas of the BLDS requiring attention, based on the goals and priorities identified in the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement. **Suggested** areas of focus are identified in the *Board Leadership Development Planning Template and Implementation Continuum* (Appendix C), building on the requirements for Succession Planning and Talent Development in 2009-10. Figure 1 below outlines the **required** and **suggested** areas of focus.

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\(^5\) Both these resources can be found on the Institute for Education Leadership (IEL) website at [http://www.education-leadership-ontario.ca/resources.shtml](http://www.education-leadership-ontario.ca/resources.shtml).
Ministry Required Focus Areas for 2010–11:
- Board Leadership Development Plan
- Mentoring for newly appointed school leaders
- Participation in mentoring for newly appointed
  - system leaders
- Principal/vice-principal performance appraisal (PPA)
- Terms and Conditions of Employment of Principals
  - and Vice-Principals (PPM No. 152)

Ministry Suggested Focus Areas for 2010–11:
- Based on 2009–10 Focus Areas
  - Data Collection
  - Skills and Competencies
  - Professional Learning

Other Focus Areas for 2010–11:
- The Board Leadership Development Implementation Plan will include any other areas of focus that the board chooses to invest in through the ministry leadership development funds, based on the goals and priorities identified in the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement
- Boards may also identify additional areas of focus in the plan, that are not financed through ministry leadership development funds
3.5 Mentoring for Newly Appointed School Leaders

Boards are required to provide mentoring for newly appointed school leaders (principals/vice-principals) and to support participation in mentoring for newly appointed system leaders (supervisory officers/directors of education).

**What is it?** Mentoring is a non-evaluative relationship between a newer and a more experienced professional. The focus is the professional learning needs of the mentee. The mentor uses questioning and feedback techniques in the context of a trusting relationship and a learning plan developed by the mentor and mentee together. In the face of multiple demands and priorities, mentoring can accelerate learning, reduce isolation and increase the confidence and skill of newly appointed school and system leaders. Experienced school and system leaders also benefit from mentoring by receiving support and resources that will assist them in becoming effective mentors and continuing to develop their own leadership competencies.

**What is the purpose?** At the heart of it, mentoring provides guidance and support tailored to the unique role of newly appointed school leaders so they can be successful in acquiring and putting into practice the technical and adaptive skills that are essential in this important stage of their leadership career.

**What is required in 2010–11?**
- School boards must provide mentoring for newly appointed school leaders based on the requirements set out in the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11) and the Mentoring for Newly Appointed School Leaders Implementation Continuum (Appendix D) as part of the Board Leadership Development Planning Template and Implementation Continuum (Appendix C).
- Board Leadership Development Strategy (BLDS) funds are to be used by boards to support the implementation of mentoring for newly appointed school leaders.
- School boards will support newly appointed system leaders who wish to participate in mentoring for newly appointed system leaders that is provided through supervisory officer and director of education associations.

**How does it connect to the BLDS?** Boards have noted that both mentoring and principal/vice-principal performance appraisal provide support systems required to encourage aspiring leaders to transition into the role of principalship. Through these supports, potential leaders observe processes that promote engagement and talent development. In addition, feedback on the implementation of mentoring reveals that the Ontario Leadership Framework (OLF) has become a fundamental tool in determining
the practices and competencies that become the areas of focus in the professional growth of mentees and in developing mentoring relationships among colleagues throughout the district.

3.6 Principal/Vice-Principal Performance Appraisal (PPA)

Boards are required to implement principal/vice-principal performance appraisal (PPA) in accordance with the provisions of regulation (O. Reg. 234/10):

What is it? Principal/vice-principal performance appraisal (PPA) is a goal oriented appraisal process in which the principal/vice-principal sets goals with input from staff and their supervisors and identifies actions to improve student achievement and well-being.

What is the purpose? The PPA is designed to ensure that school leaders are well supported in their professional growth and development through a targeted, district-wide strategy that provides formal and informal opportunities for feedback, dialogue and ongoing professional learning.

What is required in 2010-11?
- School boards will implement the principal/vice-principal performance appraisal (PPA) regulation (O. Reg. 234/10) beginning September 1, 2010. The Principal/Vice-Principal Performance Appraisal (PPA) Technical Requirements Manual (2010) guides school boards in the implementation of PPA.
- Board Leadership Development Strategy (BLDS) funds can be used by boards to help support implementation of the PPA process (e.g. training, purchase of resources).
- To support effective planning, school boards are required to establish a five-year PPA cycle and report the projected estimate of appraisals that will take place each year in the Board Leadership Development Planning Template and Implementation Continuum (Appendix C).

How does it connect to the BLDS? Performance appraisals and annual growth plans foster leadership development by providing opportunities for principals and vice-principals to engage in meaningful dialogue with their supervisors about performance, articulate the supports they require to achieve performance goals, and provide opportunities for professional growth. The PPA process also helps districts create competent and confident leaders and facilitate effective succession planning.
3.7 Policy/Program Memorandum (PPM) No. 152: Terms and Conditions of Employment of Principals and Vice-Principals

Boards are required to establish the terms and conditions of employment of principals and vice-principals as set out in PPM No. 152:

What is it? PPM No. 152 outlines a number of provisions to include as part of the terms and conditions of employment for principals and vice-principals (e.g. transfer process, redundancy and reassignment). In addition, the Effective Practices Guide for Principal/Vice-Principal Terms and Conditions of Employment further describes effective practices that boards can use to inform meaningful discussions with principals and vice-principals.

What is the purpose? The purpose of PPM No. 152 and the guide is to set out provincial standards of practice to assist school boards in establishing terms and conditions of employment of principals and vice-principals that are consistent province-wide. Boards are required to use a consultative process as they establish or update their policies on principal/vice-principal terms and conditions of employment.

What is required in 2010-11?

- School boards will comply with the provisions of PPM No. 152: Terms and Conditions of Employment of Principals and Vice-Principals by March 31, 2011.

How does it connect to the BLDS? Modelling effective human relations in the development of transparent terms and conditions of employment is an integral component of good succession planning as it may be helpful in attracting potential school leaders. Having the best school leaders will ultimately increase student achievement and well-being.

3.8 Ministry Reporting Requirements

School boards will meet all ministry reporting requirements related to the BLDS in 2010–11, as outlined in Section 4 – Responsibilities, Eligible Expenses and Reporting.
3.9 Monitoring and Evaluation

The board is responsible for monitoring and evaluating on an ongoing basis to determine whether the BLDS is being implemented effectively, and achieving its intended goals. This enables boards to identify barriers and issues and take action to address challenges and make adjustments as needed. The ministry may also evaluate or engage external evaluators to assess the impact of the BLDS and the experience of leaders within the district.

Board leads and steering committees are encouraged to consider the resources and opportunities offered through the Ontario Leadership Strategy and the Board Leadership Development Strategy, as well as other resources which can be leveraged to align practices and develop the capacities of leaders throughout the district such as:

- Leadership development opportunities and resources offered by associations representing principals/vice-principals, supervisory officers, and directors of education (see Appendix B for a list of key partners);
- Institute for Education Leadership’s Leadership Self-Review Tool;
- Executive Development through The Learning Partnership and Rotman School of Business;
- Executive Development through the Centre franco-ontarien de ressources pédagogiques – FPC (Executive Leadership Institute for French Language School and System Leaders.)
4. Responsibilities, Eligible Expenses, and Reporting

4.1 Responsibilities

The following chart provides an overview of specific roles, and reporting responsibilities.

√ = final approval (required)
X = consultation and development (suggested)
BL = BLDS lead
SC = Steering committee
SO = Designated BLDS Supervisory Officer
DE = Director of education

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<tr>
<th>Activity / Report</th>
<th>Board</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>SC</td>
</tr>
<tr>
<td>Identify BLDS lead</td>
<td>X</td>
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<tr>
<td>Establish a BLDS Steering Committee</td>
<td>X</td>
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<tr>
<td>Identify BLDS goals</td>
<td>X</td>
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<tr>
<td>Develop a BLDS implementation plan</td>
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<tr>
<td>Provide mentoring of newly appointed school leaders and support mentoring of newly appointed system leaders</td>
<td>X</td>
</tr>
<tr>
<td>Implement principal/vice-principal performance appraisal (PPA)</td>
<td>X</td>
</tr>
<tr>
<td>Comply with Terms and Conditions of Employment of Principals and Vice- Principals (PPM 152)</td>
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<tr>
<td>Monitoring and Evaluation</td>
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<td>Completion and submission of identified sections of the Board Leadership Development Planning Template and Implementation Continuum Board Leadership Development Planning Template and Continuum (Appendix C) to ministry in October 2010</td>
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<tr>
<td>Completion and submission of PPM 152 – Terms and Conditions of Employment of Principals and Vice- Principals Compliance Statement (Appendix C – Board Leadership Development Planning Template and Implementation Continuum, Section 7) to ministry in March 2011</td>
<td>X</td>
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<tr>
<td>Completion and submission of Final Report to ministry in July 2011</td>
<td>X</td>
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</table>
4.2 Eligible Expenses

Eligible expenditures include:

- Implementation planning and goal-setting for BLDS (e.g. seeking professional advisory/consultation services to establish the BLDS, participation in training, purchase of books or other resources);
- Professional Learning and purchase and/or development of resources to support the implementation of the BLDS (e.g. professional learning and resources for the BLDS Lead);
- Costs associated with the implementation of mentoring for newly appointed leaders, in accordance with the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11);
- Costs associated with supporting the implementation of the principal/vice-principal performance appraisal (PPA) regulation (O. Reg. 234/10), referring to the Principal/Vice-Principal Performance Appraisal (PPA) Technical Requirements Manual (2010) for guidance;
- Costs associated with complying with the provisions of PPM No. 152 – Terms and Conditions of Employment of Principals and Vice-Principals;
- Costs associated with monitoring and evaluation of the BLDS;
- Steering Committee Meeting costs (e.g. travel and accommodations, in accordance with the Ontario Management Board of Cabinet Travel, Meal and Hospitality Expense Directive);
- BLDS coordination and planning.

Ineligible expenses include:

- Capital expenditures (e.g. furniture and equipment);
- Staff / support staff not related to BLDS (e.g. Educational assistants or school office administrative support);
- Resources for students e.g. textbooks and classroom materials.
- Provisions for unused funds will be determined at the end of each year.
4.3 Reporting Requirements

There is one consolidated report for the Board Leadership Development Strategy (BLDS) in 2010-11. Boards are required to complete specific sections of the report and submit an electronic copy to the Regional Education Officer three times during the year. The report template, containing specific requirements, is attached in the Board Leadership Development Planning Template and Implementation Continuum (Appendix C).

Board Leadership Development Planning Template and Implementation Continuum (Appendix C)

Section 1: Instructions

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than October 29, 2010:

- Section 2: Authorization and Contact page – Part 2a) only C 2
- Section 3: BLDS District Information – Part 3a), 3b), and 3c) only C 3
- Section 4: 2010-11 Board Leadership Development Goals – Part 4a) only C 5
- Section 5: Detailed Accounting Statement – Part 5a) only C 8
- Section 6: Plan for Training for Mentoring – Part 6a) only C 9
  Plan for Training for Principal/Vice-Principal Performance Appraisal – Part 6c) only C 10
- Section 8: Board Leadership Development Continuum C 12
- Section 9: Mentoring for Newly Appointed School Leaders Implementation Continuum D 1

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than March 31, 2011:

- Section 7: PPM 152 – Terms and Conditions of Employment of Principals and Vice-Principals Compliance Statement C 11

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than July 8, 2011:

- Section 2: Authorization and Contact page – Part 2b) C 2
- Section 3: BLDS District Information – Part 3d) C 4
- Section 4: 2010-11 Board Leadership Development Goals – Part 4b) C 5
- Section 5: Detailed Accounting Statement – Part 5b) C 8
- Section 6: Plan for Training for Mentoring and Plan for Training for Principal/Vice-Principal Performance Appraisal – Part 6d) C 10
Appendix A: The Ontario Leadership Framework
Including the Five Core Leadership Capacities (CLCs)

The Ontario Leadership Framework

The establishment and promotion of a common Ontario Leadership Framework (OLF) is central to the ministry’s Ontario Leadership Strategy. Part One of the Framework identifies a set of core leadership practices and competencies – skills, knowledge, and attitudes – for principals, vice-principals and supervisory officers that describe effective leadership. Part Two includes system practices and procedures which support successful leadership. The Framework is intended neither as a job description for the leader, nor as a checklist against which to assess performance.

The OLF is evidence-based and reflects the Ontario’s culture of high expectations within education. It has been developed with education partners and world-recognized leadership experts. The Framework provides a common language to describe and discuss effective leadership and is an important step to building leadership capacity in Ontario. It confirms the influence of leadership on student learning in the following domains:

- Setting Directions;
- Building Relationships and Developing People;
- Developing the Organization;
- Leading the Instructional Program;
- Securing Accountability.

The Ontario Leadership Framework has been adopted by the Institute for Education Leadership (IEL). The Framework has been tailored to the separate needs of principals and supervisory officers and has been adapted to reflect the Catholic faith and French language perspectives.

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6 Ontario's Institute for Education Leadership funded the Leading the Future: A Project of the Directors of Education in Southwest Ontario. As part of the mandate of this project, part 2 of the OLF was revised pending appropriate vetting of provincial stakeholders. The final report can be found at http://www.education-leadership-ontario.ca/files/IELLeadingFuture.pdf.

7 Ontario's Institute for Education Leadership is a unique partnership between representatives of Ontario principals' and supervisory officers' associations, councils of directors of education, and the Ministry of Education that is committed to exploring leading-edge thinking on education leadership and applying that expertise to the development of high-quality resources and learning opportunities for school, board, and system leaders.
The Ontario Leadership Framework is instrumental to supporting career-long professional learning for principals/vice-principals, supervisory officers, and directors. For the ministry, the OLF provides the foundation that underpins all leadership and professional learning policies and initiatives. For districts, the OLF is integral to the Board Leadership Development Strategy as it focuses on individual and organizational development. For schools, the OLF provides the principal and vice-principal with the practices and competencies identified in the research to have a positive effect on student achievement, raising the bar and reducing the gap. Teacher leaders may also find the OLF helpful as a resource.

More information about the Ontario Leadership Framework is available at the Institute for Education Leadership (IEL) website at www.education-leadership-ontario.ca/resources.shtml. The IEL provides training on the OLF to boards upon request.

Five Core Leadership Capacities (CLCs)

Boards are encouraged to refer to the Ontario Leadership Framework as a foundation of their capacity building for principals/vice-principals, supervisory officers, and directors. In this context, boards may use the Core Leadership Capacities (CLCs) to support their own leadership development activities. The CLCs are derived from the Ontario Leadership Framework. They have been recognized by research, practitioners, and education partners as being critical areas of leadership required for sustained improvement in student achievement and well-being. Principals/vice-principals, supervisory officers, and directors use the Ontario Leadership Framework as a resource to identify practices and competencies that will be their focus for building expertise, including those related to the five CLCs. As environments change and expertise grows, leaders identify new areas for development related to the CLCs. In this way, they continuously improve their practice.

The Core Leadership Capacities are as follows:

- Setting goals;
- Aligning resources with priorities;
- Promoting collaborative learning cultures;
- Using data;
- Engaging in courageous conversations.
Ideas Into Action is a publication developed by the Ministry of Education to provide research insights and practical strategies for school and system leadership, including the Core Leadership Capacities. Issues of Ideas Into Action are available on the Ministry of Education’s website at www.ontario.ca/leadership.
Appendix B: Key Partners

The 2010–11 Board Leadership Development Strategy (BLDS) is informed by the work of the Ministry of Education, in partnership with school boards and key partners representing principal, supervisory officer and director of education associations.

Board leads and steering committees are encouraged to contact associations to access resources and professional learning opportunities, which support the Board Leadership Development Strategy (BLDS) and develop the capacities of leaders throughout the district.

- Association des conseillères et conseillers des écoles publiques de l’Ontario;
- Association des directions et directions adjointes des écoles franco-ontariennes;
- Association des gestionnaires de l’éducation franco-ontarienne;
- Association franco-ontarienne des conseils scolaires catholiques;
- Catholic Principals’ Council of Ontario;
- Centre franco-ontarien de ressources pédagogiques
- Conseil ontarien des directrices et directeurs de l’éducation de langue française;
- Council of Ontario Directors of Education;
- English Catholic Council of Directors of Education of Ontario
- Ontario Catholic School Trustees’ Association;
- Ontario Catholic Supervisory Officers’ Association;
- Ontario Principals’ Council;
- Ontario Public School Boards’ Association;
- Ontario Public Supervisory Officials’ Association;
- The Learning Partnership in partnership with the Rotman School of Management at the University of Toronto.
Appendix C: Board Leadership Development Planning Template and Implementation Continuum

SECTION 1: INSTRUCTIONS

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than October 29, 2010:

- Section 2: Authorization and Contact page – Part 2a) only
- Section 3: BLDS District Information – Part 3a), 3b), and 3c) only
- Section 4: 2010-11 Board Leadership Development Strategy Goals – Part 4a) only
- Section 5: Detailed Accounting Statement – Part 5a) only
- Section 6: Plan for Training for Mentoring – Part 6a) only
  Plan for Training for Principal/Vice-Principal Performance Appraisal – Part 6c) only
- Section 8: Board Leadership Development Implementation Continuum
- Section 9: Mentoring for Newly Appointed School Leaders Implementation Continuum (Appendix D)

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than March 31, 2011:

- Section 7: PPM 152 – Terms and Conditions of Employment of Principals and Vice-Principals Compliance Statement

Please complete the sections listed below and submit an electronic copy of this report to frances.myre@ontario.ca with a copy to your Regional Education Officer no later than July 8, 2011:

- Section 2: Authorization and Contact page – Part 2b)
- Section 3: BLDS District Information – Part 3d)
- Section 4: 2010-11 Board Leadership Development Strategy Goals – Part 4b)
- Section 5: Detailed Accounting Statement – Part 5b)
- Section 6: Plan for Training for Mentoring – Part 6b)
  Plan for Training for Principal/Vice-Principal Performance Appraisal – Part 6d)
### Name of District School Board/School Authority/Provincial Schools Authority:

<table>
<thead>
<tr>
<th>Director of Education/Supervisory Officer for School Authority/Director of Provincial Schools:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Telephone:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Director's Signature for Board Leadership Development Plan:</th>
<th>Date:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Superintendent responsible for the BLDS 2010-11:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Telephone:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2010-11 BLDS District Lead Contact Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Telephone:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
</tbody>
</table>

**Part 2a)**

**Board Leadership Development Steering Committee includes:**

- [ ] Designated BLDS Superintendent
- [ ] BLDS District Lead
- [ ] Mentoring for Newly Appointed School Leaders Lead
- [ ] Principal/Vice-Principal Performance Appraisal Lead
- [ ] Principal/Vice-Principal
- [ ] Other: ______________________________________

<table>
<thead>
<tr>
<th>Planned Steering Committee Meeting Dates:</th>
</tr>
</thead>
<tbody>
<tr>
<td>______________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Director's Signature for Final Report:</th>
<th>Date:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Chief Financial Officer's Signature for Final Report:</th>
<th>Date:</th>
</tr>
</thead>
</table>

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8 This Authorization Page confirms that the information in this report is accurate and that the board is implementing the Board Leadership Development Strategy in accordance with ministry requirements.
SECTION 3: BOARD LEADERSHIP DEVELOPMENT STRATEGY DISTRICT INFORMATION

Part 3 a) Principal/Vice-Principal Mentor/Mentee Participant Numbers for 2010-11

<table>
<thead>
<tr>
<th>Mentee Participants *</th>
<th>Numbers</th>
<th>Mentor Participants</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Year Principal Mentees</td>
<td></td>
<td>Practicing Principal Mentors</td>
<td></td>
</tr>
<tr>
<td>First Year Vice-Principal Mentees</td>
<td></td>
<td>Practicing Vice-Principal Mentors</td>
<td></td>
</tr>
<tr>
<td>Second Year Principal Mentees</td>
<td></td>
<td>Retired Principal Mentors</td>
<td></td>
</tr>
<tr>
<td>Second Year Vice-Principal Mentees</td>
<td></td>
<td>Retired Vice-Principal Mentors</td>
<td></td>
</tr>
<tr>
<td>Total Mentees</td>
<td></td>
<td>Total Mentors</td>
<td></td>
</tr>
</tbody>
</table>

Note: If the district has newly appointed school leaders that are not participating as mentees, note these numbers

*Note: Include acting and permanent staff in the role of principal and vice-principal – actual numbers at time of submission.

Part 3 b) System Leader Mentor/Mentee Participant Numbers for 2010-11

<table>
<thead>
<tr>
<th>Newly Appointed System Leaders *</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Year Superintendent (Academic)</td>
<td></td>
</tr>
<tr>
<td>First Year Superintendent (Business)</td>
<td></td>
</tr>
<tr>
<td>Second Year Superintendent (Academic)</td>
<td></td>
</tr>
<tr>
<td>Second Year Superintendent (Business)</td>
<td></td>
</tr>
<tr>
<td>First Year Director</td>
<td></td>
</tr>
<tr>
<td>Second Year Director</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
</tbody>
</table>

*Note: Include acting and permanent staff in the role of supervisory officer and director – actual numbers at time of submission.

Part 3 c) Principal/Vice-Principal Performance Appraisal Number Projections

<table>
<thead>
<tr>
<th>PPA Participants</th>
<th>Numbers</th>
<th>Numbers</th>
<th>Numbers</th>
<th>Numbers</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second year principals / vice-principals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fifth year cycle – principals / vice-principals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Part 3 d) Final Principal/Vice-Principal Performance Appraisal Numbers 2010-11

<table>
<thead>
<tr>
<th>Actual Numbers and Rating of Principals/Vice-Principals Appraised through the PPA Process</th>
<th>2nd Year Satisfactory</th>
<th>2nd Year Unsatisfactory</th>
<th>5th Year Cycle Satisfactory</th>
<th>5th Year Cycle Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vice-principals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of evaluations not completed __________

Reason (e.g. leaves, withdrawals, reassignment, other):
SECTION 4: 2010-11 BOARD LEADERSHIP DEVELOPMENT STRATEGY GOALS

- Districts are asked to establish three goals as a focus for the implementation of their Board Leadership Development Strategy in 2010-11.
- One goal will include mentoring for newly appointed school leaders.
- A separate page has been provided for each individual goal of the BLDS.
- Please note that district goals should reflect areas identified through the Board Leadership Development Continuum as needing the most attention.

PART 4a): Goals and Strategies

| 2010-11 STRATEGY GOAL - #1 (refer to the Board Leadership Development Continuum: Section D, #2 – Mentoring) |
|---|---|---|---|
| Identify the area of focus from the Board Leadership Development Continuum which relate to your goal: |
| GOAL: |
| INDICATORS: |
| (How will you know if you have met this goal?) |

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Resources</th>
<th>Target Audience</th>
<th>Timelines</th>
</tr>
</thead>
</table>

PART 4b): Outcomes (to be report by July 8, 2011)

Did you meet this goal? If not, please explain why.

- [ ] YES
- [ ] PARTIALLY
- [ ] NO

Comments:
### PART 4a): Goals and Strategies

#### 2010-11 STRATEGY GOAL- #2

Identify the area of focus from the Board Leadership Development Continuum which relate to your goal:

<table>
<thead>
<tr>
<th>GOAL:</th>
</tr>
</thead>
</table>

#### INDICATORS:

(How will you know if you have met this goal?)

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Resources</th>
<th>Target Audience</th>
<th>Timelines</th>
</tr>
</thead>
</table>

### PART 4b): Outcomes (to be report by July 8, 2011)

**Did you meet this goal? If not, please explain why.**

- □ YES
- □ PARTIALLY
- □ NO

*Comments:*
## SECTION 4: 2010-11 BOARD LEADERSHIP DEVELOPMENT STRATEGY GOALS

### PART 4a): Goals and Strategies

**2010-11 STRATEGY GOAL - #3**

Identify the area of focus from the Board Leadership Development Continuum which relate to your goal:

<table>
<thead>
<tr>
<th>GOAL:</th>
</tr>
</thead>
</table>

**INDICATORS:**

*(How will you know if you have met this goal?)*

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Resources</th>
<th>Target Audience</th>
<th>Timelines</th>
</tr>
</thead>
</table>

### PART 4b): Outcomes *(to be report by July 8, 2011)*

**Did you meet this goal? If not, please explain why.**

- □ YES
- □ PARTIALLY
- □ NO

**Comments:**
**SECTION 5: DETAILED ACCOUNTING STATEMENT**

- Please use Section 5a) to indicate your board’s planned expenditures of Ministry BLDS funding for the 2010-11 school year.
- Please use Section 5b) to indicate your board’s actual expenditures of Ministry BLDS funding for the 2010-11 school year.

<table>
<thead>
<tr>
<th>Part 5a): To be submitted no later than October 29, 2010</th>
<th>Part 5b): To be submitted no later than July 8, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items</td>
<td>Projected Expenditures between August 1, 2010 – March 31, 2011</td>
</tr>
<tr>
<td>-------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>1.</td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td>$</td>
</tr>
<tr>
<td>4.</td>
<td>$</td>
</tr>
<tr>
<td>5.</td>
<td>$</td>
</tr>
<tr>
<td>6.</td>
<td>$</td>
</tr>
<tr>
<td>7.</td>
<td>$</td>
</tr>
<tr>
<td>8.</td>
<td>$</td>
</tr>
<tr>
<td>TOTAL BLDS EXPENDITURES FOR 2010-11</td>
<td>$</td>
</tr>
</tbody>
</table>
## SECTION 6: PLAN FOR TRAINING 2010-11

Mentoring for Newly Appointed School Leaders

<table>
<thead>
<tr>
<th>Plan for Training (August 1\textsuperscript{st}, 2010 to July 31\textsuperscript{st}, 2011)</th>
<th>Part 6a) To be submitted no later than October 29, 2010</th>
<th>Part 6b) To be submitted no later than October July 8, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation for 1\textsuperscript{st} Year Mentees</td>
<td>Mentor Training for 1\textsuperscript{st} Year Mentors</td>
<td>Mentor Training for Experienced Mentors</td>
</tr>
<tr>
<td>Planned Date(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Number of Participants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topics to be Covered</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources to be Provided</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trainer Information (Who provided the training?)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**SECTION 6: PLAN FOR TRAINING 2010-11**

**Principal/Vice-Principal Performance Appraisal**

<table>
<thead>
<tr>
<th>Plan for Training (August 31&lt;sup&gt;st&lt;/sup&gt;, 2010 to July 31&lt;sup&gt;st&lt;/sup&gt;, 2011)</th>
<th>Part 6c) To be submitted no later than October 29, 2010</th>
<th>Part 6d) To be submitted no later than October July 8, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>Date(s)</td>
<td>Number</td>
</tr>
</tbody>
</table>

**Initial Training to Date (on Regulation and Appraisal Process)**

<table>
<thead>
<tr>
<th>Total # of Appraisers (Principals and Supervisory Officers)</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Total # of Appraisees (Vice-principals and Principals)</th>
<th></th>
</tr>
</thead>
</table>

**Professional Learning to Enhance the Appraisal Process**

<table>
<thead>
<tr>
<th>Topic(s)</th>
<th>Date(s)</th>
<th>Topic(s)</th>
<th>Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>e.g., Goal Setting, Ontario Leadership Framework, Courageous Conversations, Using the Performance Plan, Using the Annual Growth Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Trainer Information (Who provided the training?)**
SECTION 7: PPM 152: TERMS AND CONDITIONS OF EMPLOYMENT OF PRINCIPALS AND VICE-PRINCIPALS COMPLIANCE STATEMENT

Please complete and email the form below to Frances Myre, Leadership Development Branch at Frances.Myre@ontario.ca, with a copy to [Name of Regional Education Office contact] at [email address of Regional Education Office contact] no later than March 31, 2011.

To: Frances Myre  
Leadership Development Branch  

From: [Click here and type name of sender]  

Phone: 416-325-1073  
Date: [Click here and type date]  

Re: PPM 152 Compliance Statement  
CC: (name of regional education officer)

This letter is to confirm that [Click here and type name of Board] has, by March 31, 2011, complied with the requirements set out in Policy/Program Memorandum No. 152: Terms and Conditions of Employment of Principals and Vice-Principals.

_________________________________________  
Signature  
Director of Education  

_________________________________________  
Date

Please print full name
SECTION 8: BOARD LEADERSHIP DEVELOPMENT IMPLEMENTATION CONTINUUM

- Using the Board Leadership Development Continuum, please highlight in yellow the descriptor which best matches your board’s current level of implementation.
- All resources developed with BLDS funds are to be made available to the Ministry of Education upon request.
- The Institute for Education Leadership’s (IEL) APPLIKI search engine contains useful resource materials for succession planning and talent development currently in use in Ontario’s school system. Also, the IEL offers the Leadership Self-Review Tool (LSRT), developed to help school boards assess the support they offer their school leaders (see www.education-leadership-ontario.ca for more information).
- Districts are encouraged to share succession planning and talent development resources with the IEL to be included in the APPLIKI search engine.

Figure 1: Board Leadership Development Planning Template and Continuum

Ministry Required Focus Areas for 2010–11:
- Board Leadership Development Plan
- Mentoring for newly appointed school leaders
- Participation in mentoring of newly appointed system Leaders
- Principal/vice-principal performance appraisal (PPA)
- Terms and Conditions of Employment of Principals and Vice-Principals (PPM No. 152)

Ministry Suggested Focus Areas for 2010–11:
- Based on 2009-10 Focus Areas
  - Data Collection
  - Skills and Competencies
  - Professional Learning

Other Focus Areas for 2010–11:
- The Board Leadership Development Implementation Plan will include any other areas of focus that the board chooses to invest in through the ministry leadership development funds, based on the goals and priorities identified in the Board’s Strategic Plan and the Board Improvement Plan for Student Achievement.
- Boards may also identify additional areas of focus in the plan, that are not financed through ministry leadership development funds.
### Board Leadership Development Implementation Continuum

**A. Identification and Recruitment Practices:** The district has a leadership development strategy that includes well developed, well communicated and inclusive identification and recruitment practices.

<table>
<thead>
<tr>
<th>Fundamental Components</th>
<th>Implementation</th>
<th>Building Capacity</th>
<th>Sustaining Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership Profile</strong></td>
<td>• Establishes processes to communicate the profile of an effective leader throughout the system in multiple ways.</td>
<td>• Confirms that staff (current and aspiring leaders) can articulate the profile of an effective leader.</td>
<td>• Refines the profile of an effective leader to clarify and promote common understandings across the district.</td>
</tr>
<tr>
<td></td>
<td>• Communicates the profile to advance effective instructional leadership that is focused on student achievement and well-being.</td>
<td>• Supports the profile to advance effective instructional leadership that is focused on student achievement and well-being.</td>
<td>• Adapts the profile to advance emerging and future needs to effective instructional leadership that is focused on student achievement and well-being.</td>
</tr>
<tr>
<td><strong>Self Assessment</strong></td>
<td>• Provides training for aspiring leaders on the available self assessment tools for particular leadership roles.</td>
<td>• Promotes self assessment tools and training through well communicated processes.</td>
<td>• Re-assesses self assessment and feedback processes consistently and cyclically.</td>
</tr>
<tr>
<td></td>
<td>• Establishes mechanisms for aspiring leaders to receive feedback concerning their leadership development.</td>
<td>• Identifies high potential candidates and encourages them to self assess.</td>
<td>• Modifies processes based on gap identification in order to support the various needs of aspiring leaders.</td>
</tr>
<tr>
<td></td>
<td>• Supports the provision of feedback to aspiring leaders.</td>
<td>• Supports the provision of feedback to aspiring leaders.</td>
<td></td>
</tr>
</tbody>
</table>
### A. Identification and Recruitment Practices

The district has a leadership development strategy that includes well developed, well communicated and inclusive identification and recruitment practices.

<table>
<thead>
<tr>
<th>Fundamental Components</th>
<th>Implementation</th>
<th>Building Capacity</th>
<th>Sustaining Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3 Data Collection</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The district uses current data to identify system needs, including economic factors, population trends, and range of experience of staff.</td>
<td>- Uses system needs data to inform long term planning for each school as well as the district (e.g., to ensure informed succession planning).&lt;br&gt;- Establishes mechanisms and determines tools that will be used to gather information concerning the supports provided to school leaders (e.g. Leadership Self-Review Tool).</td>
<td>- Focuses leadership training and development to ensure an adequate pool of well qualified leaders to meet future needs.&lt;br&gt;- Gathers and assesses the data gathered concerning the supports provided to school leaders to inform leadership development practices.</td>
<td>- Refines leadership development opportunities and recruitment plans, regularly communicating to staff at all stages of their careers.&lt;br&gt;- Refines data gathering processes based on needs and monitors interest from aspiring and qualified leaders to ensure that effective leaders are attracted to the role.</td>
</tr>
<tr>
<td><strong>4 Diversity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The district develops a strategy to attract and develop leaders that reflect the diversity within the community.</td>
<td>- Identifies systemic barriers and discriminatory biases that may limit the opportunities of individuals from diverse communities for hiring and promotion.&lt;br&gt;- Establishes effective practices in attracting individuals from diverse communities.</td>
<td>- Focuses on removing systemic barriers and discriminatory biases that may limit the opportunities of individuals from diverse communities for hiring and promotion.&lt;br&gt;- Promotes effective practices in attracting individuals from diverse communities.</td>
<td>- Reviews and monitors perceptions of the strategy to attract and develop leaders that reflect the diversity within the community and remove systemic barriers and discriminatory biases.&lt;br&gt;- Revises effective practices in attracting individuals from diverse communities.</td>
</tr>
<tr>
<td><strong>5 Leadership Roles</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The district actively provides opportunities for staff to experience leadership roles.</td>
<td>- Establishes leadership development opportunities for staff to experience various leadership roles (e.g. chair of committee or staff meeting).</td>
<td>- Promotes leadership development opportunities for staff to experience various leadership roles and provides feedback to potential leaders based on the experience.</td>
<td>- Refines and monitors various leadership development opportunities for staff to experience various leadership roles and provides feedback to potential leaders based on the experience. (e.g. job shadowing, acting position, internship).</td>
</tr>
</tbody>
</table>

Additional comments if required:

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9 The Ministry of Education’s Operational Review Report provides useful information and recommendations concerning human resource management and school staffing/allocation.

10 Leadership Self Review Tool or equivalent instrument used by boards.
### B. Training and Development for Aspiring Leaders

The district has a leadership development strategy that includes training and talent development for aspiring leaders.

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<tr>
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</table>
| 1 Practices and Competencies | - Identifies and communicates practices and competencies that leaders are expected to reflect in various leadership positions.  
- Develops academic leadership profiles that are based on the Ontario Leadership Framework. | - Provides opportunities for aspiring leaders to observe and acquire competencies necessary to successfully implement leadership practices (e.g. job shadowing program, online support communities).  
- Supports aspiring leaders based on the challenges identified when developing instructional leadership capacities. | - Monitors and refines opportunities for aspiring leaders to observe and acquire competencies necessary to successfully implement leadership practices (e.g. job shadowing program, online support communities).  
- Reviews and revises the supports provided to aspiring leaders based on the challenges identified when developing instructional leadership capacities. |
| Leadership Curriculum | - Establishes a leadership curriculum based on feedback from aspiring, newly appointed, and experienced leaders concerning the learning needs of aspiring leaders.  
- Develops and communicates training and development opportunities for potential leaders. | - Aligns training and developments opportunities for potential leaders with the district’s leadership profile.  
- Provides various adult learning opportunities that focus on problem-based learning and self reflection. | - Modifies the district’s leadership profile and training and development opportunities for potential leaders based on the feedback from participants and newly appointed and experienced leaders.  
- Refines adult learning opportunities to include a wide range of strategies such as portfolio development, action research, and/or education improvement initiatives. |

Additional comments if required:
## Selection Processes

The district has a leadership development strategy that includes selection processes that are systematic, transparent, equitable and inclusive.

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<tbody>
<tr>
<td><strong>1 Pathways to Leadership</strong>&lt;br&gt;The district encourages aspiring leaders who bring a variety of backgrounds and experience to consider the leadership path.</td>
<td>- Encourages potential candidates from a wide variety of backgrounds and to consider the leadership path.</td>
<td>- Promotes and communicates clearly identified pathways to and requirements for various leadership positions to potential candidates from a wide variety of backgrounds.</td>
<td>- Re-assesses communication mechanisms of pathways to and requirements for all leadership positions, with a specific focus on promoting an equitable and fair process that encourages aspiring leaders from a variety of backgrounds and experiences.</td>
</tr>
<tr>
<td><strong>2 Selection Process</strong>&lt;br&gt;The district recognizes that a multifaceted selection process is required to accommodate a variety of learning styles.</td>
<td>- Identifies a selection process, criteria and tools based on the competencies and practices of an effective leader (e.g. Ontario Leadership Framework).&lt;br&gt;- Establishes a selection process that can accommodate a variety of learning styles.</td>
<td>- Promotes a selection process, criteria and tools based on the competencies and practices of an effective leader.&lt;br&gt;- Supports and communicates a selection process that can accommodate a variety of learning styles.</td>
<td>- Reviews and revises the selection process based on the feedback from current and aspiring leaders to determine whether the process identifies aspiring leaders that demonstrate the competencies and practices of an effective leader and that the process is seen as accommodating, open, transparent, and fair.</td>
</tr>
<tr>
<td><strong>3 Identification of Barriers</strong>&lt;br&gt;The district identifies biases and barriers in its selection processes.</td>
<td>- Articulates a district and school leadership commitment to removing bias and barriers in the selection process.</td>
<td>- Develops a process for removing bias and barriers in the selection processes of the district and schools (e.g. outreach to employee groups, facilitated access to the selection process).</td>
<td>- Re-assesses the selection process and refines as necessary to promote a process that is viewed as inclusive, equitable, and free of biases and barriers.</td>
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</table>

Additional comments if required:
D. **Professional Learning Opportunities for Newly Appointed Leaders**: The district has a leadership development strategy that includes a range of professional development opportunities for newly appointed school and system leaders.

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<tbody>
<tr>
<td>1 Learning Requirements</td>
<td>• Develops and communicates training and development opportunities and resources for newly appointed leaders. • Identifies expectations for those new to the role and includes training as part of the district calendar.</td>
<td>• Aligns training and development opportunities and resources for new potential leaders with the district leadership curriculum. • Promotes expectations for those new to the leadership role and includes training as an integral part of the district calendar.</td>
<td>• Refines and aligns training and development opportunities and resources taking into consideration feedback provided by newly appointed principals and supervisory officers. • Refines various adult learning opportunities that take into consideration problem-based learning and self reflection. • Ensures that training and resources are readily available for those beginning a new role at different times of the year.</td>
</tr>
</tbody>
</table>

**Mentoring**

The district implements mentoring as outlined in the *Mentoring Requirements Manual*, focused on the areas included in Mentoring for Newly Appointed School Leaders Implementation Continuum (see Appendix D).

For more information, see mentoring at: www.ontario.ca/eduleadership

Determine the mentoring descriptor below which best matches your district’s current level of implementation. The level of implementation should correspond to the level most often identified in the Mentoring for Newly Appointed School Leaders Implementation Continuum (Appendix D) in the following areas: Role of the Mentoring Lead; Identification of Goals and Operational Parameters; Recruiting/Selecting Mentors; Matching Process; Roles and Responsibilities; Assessment of Mentee Learning Needs; Joint Orientation; Training of Mentors; Ongoing Professional Learning and Resources; Supporting Mentee Learning Growth Plans; Exit Process; Monitoring and Evaluation.

- Provides an overall 'implementation' level for most of the requirements and indicators in the M Mentoring for Newly Appointed School Leaders Implementation Continuum.
- Provides an overall 'building capacity' level for most of the requirements and indicators in the Mentoring for Newly Appointed School Leaders Implementation Continuum.
- Provides an overall 'sustaining capacity' level for most of the requirements and indicators in the Mentoring for Newly Appointed School Leaders Implementation Continuum.
D. **Professional Learning Opportunities for Newly Appointed Leaders:** The district has a leadership development strategy that includes a range of professional development opportunities for newly appointed school and system leaders.

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<tr>
<td><strong>3 Supporting Instructional Leadership</strong>&lt;br&gt;The district evaluates its own processes for supporting instructional leadership and managing administrative functions and demands including information requests.</td>
<td>• Establishes a system for coordinating tasks (e.g. monthly tasks inventory) and for gate-keeping external demands to allow principals and vice-principals to focus on instructional leadership.&lt;br&gt;• Provides resources and technology applications that support the facilitation of administrative tasks and instructional leadership.</td>
<td>• Refines systems for coordinating tasks and for gate-keeping external demands and promotes coordinated support systems for principals and vice-principals as instructional leaders (e.g., professional learning, reflective practices).&lt;br&gt;• Promotes resources and technology applications that support the facilitation of administrative tasks and instructional leadership.</td>
<td>• Monitors feedback concerning systems and structures to assist school and system leaders to find an appropriate balance between instructional leadership and administration.&lt;br&gt;• Reviews and modifies resources and technology applications that support the facilitation of administrative tasks and instructional leadership.</td>
</tr>
<tr>
<td><strong>4 Informal Supports</strong>&lt;br&gt;The district accesses the expertise of those recently promoted or retired from the role as supports for those new to the role.</td>
<td>• Facilitates the development of support networks for new school and system leaders to assist in problem solving emerging issues.</td>
<td>• Promotes networking for job embedded learning (e.g. connections with colleagues in other schools to jointly problem solve).</td>
<td>• Refines and actively promotes networks that support a collaborative learning culture based on the priorities of the district and province.</td>
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</table>

Additional comments if required:
### E. Placement and Transfer Processes
The district has a leadership development strategy which includes placement and transfer processes for school and district leaders with supports for success.

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</table>
| **1 Terms and Conditions**<br>The district aligns policies and procedures with the requirements of PPM 152: Terms and Condition for Principal and Vice-Principal Employment that include: negotiation process with board and local principal associations. Terms and Conditions document agreed to by the board and local principal/vice-principal associations. | • Negotiates with local principal/vice-principal associations and agrees to a Terms and Conditions document.  
• Shares Terms and Conditions document with all current principals/vice-principals and aspiring leaders in the district.  
• Achieves compliance with PPM 152 by March 31st, 2011. | • Updates district policies and procedures to reflect the terms and conditions document. | • Monitors issues related to Terms and Conditions agreement and meets with local principal/vice-principal associations as needed (e.g. reviews and modifies the transfer provisions when appropriate based on the input of leaders and transferees in the district). |
| **2 Transition Process**<br>The district develops and documents a comprehensive transition process for incoming and outgoing school and district leaders. | • Establishes a transition process for all leadership positions. | • Promotes the effective use of a transition process for all leadership positions and documents the process.  
• Identifies processes that support the exchange of knowledge between incoming and outgoing leaders. | • Refines and monitors the effective use of a transition process for all leadership positions that promotes an effective exchange of knowledge from incoming and outgoing leaders.  
• Communicates and documents changes to the process. |
| **3 Coaching**<br>The district develops a process for offering coaching appropriate to the situation and placement. Leaders that request coaching opportunities often determine the desired outcomes such as enhancing performance, reflecting on practice, or examining and solving an issue. | • Provides access to short term coaching when requested by school and district leaders.  
• Communicates availability of coaching to school and district system leaders. | • Promotes access to short term coaching and provides access when requested by school and district leaders in a timely manner based on identified needs. | • Refines coaching opportunities based on feedback from school and district leaders who have participated in the process. |

Additional comments if required:
### Capacity Building for Experienced Leaders

The district has a leadership development strategy which supports experienced school and district leaders systematically and builds capacity with a range of professional development opportunities. The BLDS may include a focus on developing skills and knowledge areas required for improving student achievement and well-being such as the core leadership capacities: setting goals, aligning resources with priorities, promoting collaborative learning cultures, using data, and engaging in courageous conversations.

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<tbody>
<tr>
<td><strong>1 Professional Learning</strong>&lt;br&gt;The district strategically supports the professional learning of all school and district leaders. The learning opportunities are connected to the Board Leadership Development Continuum outlined in Section B: Training and Development.</td>
<td>- Establishes a plan to provide professional learning opportunities for all school and district leaders.&lt;br&gt;- Identifies professional learning opportunities in accordance with identified needs and in support of the Board Improvement Plan for Student Achievement.</td>
<td>- Supports networks of schools as professional learning communities for all school and district leaders.&lt;br&gt;- Provides professional learning opportunities in accordance with identified needs and in support of the Board Improvement Plan for Student Achievement.</td>
<td>- Re-assesses the needs of school and district leaders and modifications are made to support learning networks and the goals of professional learning in the district.&lt;br&gt;- Monitors and adapts professional learning opportunities in accordance with identified needs and in support of the Board Improvement Plan for Student Achievement.</td>
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</table>

| **2 Performance Appraisal**<br>The district implements a principal/vice-principal performance appraisal system that is aligned with the principal/vice-principal performance appraisal (PPA) Ontario Regulation (O. Reg. 234/10). | - Establishes and communicates a five-year evaluation cycle to all appraisees and appraisers.<br>- Provides training and resources for appraisers and appraisees based on PPA requirements and specific district needs.<br>- Establishes a process to monitor the use of PPA in appraising principals and vice-principals. | - Provides opportunities to appraisers and appraisees to offer feedback on training and implementation supports.<br>- Supports continued training and resources on specific topics to support appraisees and appraisers.<br>- Promotes monitoring process and adapts supports to PPA as necessary. | - Reviews and evaluates impact of training and implementation supports based on feedback from appraisers and appraisees.<br>- Adapts and offers ongoing training and resources to meet needs of appraisers and appraisees.<br>- Adapts monitoring process, makes adjustments to improve PPA process, and realigns monitoring process as required. |
F. **Capacity Building for Experienced Leaders:** The district has a leadership development strategy which supports experienced school and district leaders systematically and builds capacity with a range of professional development opportunities. The BLDS may include a focus on developing skills and knowledge areas required for improving student achievement and well-being such as the core leadership capacities: setting goals, aligning resources with priorities, promoting collaborative learning cultures, using data, and engaging in courageous conversations.

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</table>
| **3 Performance Appraisal*** | • Establishes and communicates an evaluation cycle to all appraisees and appraisers.  
• Provides training and resources for appraisers and appraisees based on identified requirements and specific district needs.  
• Establishes a process to monitor the use of district resources in appraising leaders in various roles. | • Provides opportunities to appraisers and appraisees to offer feedback on training and implementation supports.  
• Supports continued training and resources on specific topics to support appraisees and appraisers.  
• Promotes monitoring process and adapts supports to appraisal process as necessary. | • Reviews and evaluates impact of training and implementation supports based on feedback from appraisers and appraisees.  
• Adapts and offers ongoing training and resources to meet needs of appraisers and appraisees.  
• Adapts monitoring process, makes adjustments to improve appraisal process, and realigns monitoring process as required. |

* *based on all leadership roles (e.g. director, supervisory officer – academic and business, managers) excluding principals and vice-principals

(See F 2 for principal/vice-principal performance appraisal)

Additional comments if required:
### Board Leadership Development Plan

The district has a comprehensive and detailed leadership development plan, a supporting factor of the district’s multi-year plans aimed at enhancing student achievement.

Districts are encouraged to share resources utilized and/or developed through the Board Leadership Development Strategy with the IEL to be included in the APPLIKI search engine. Also, resources can be shared with regional networks, coterminous boards, etc.

SECTION 9: Mentoring for Newly Appointed School Leaders – Implementation Continuum (Appendix D)

- The continuum below enables boards to identify more closely their current stage of implementation and begin to set strategic goals.
- Please highlight in yellow the stage that reflects the board’s implementation status in each requirement. Refer to Mentoring for Newly Appointed School Leaders Requirements Manual, Version 3, June 2010 for requirements and effective practices. The board may add additional information about their stage of implementation.

### Mentoring for Newly Appointed School Leaders Implementation Continuum

<table>
<thead>
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</table>
| **1. Role of Mentoring Lead**
Mentoring lead is identified by the Director of Education and informed of his/her role and responsibilities as a member of the Board Leadership Development Strategy (BLDS) Steering Committee.
The actions of the lead are supported by the BLDS Steering Committee.
The roles of Board Leadership Development Strategy Lead and the mentoring lead can be administered by the same person. | Lead:  
- receives certified Mentor training (required)
- acquires a comprehensive understanding of how the Ontario Leadership Framework (OLF) supports mentoring
- ensures that the board meets all requirements set out in the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)
- facilitates mentoring relationships within the boards and serves as liaison between mentors and mentees
- provides the necessary supports to mentors and mentees (e.g. resources, examples of learning plan templates)
- makes connections between mentoring and the Board Leadership Development Strategy (BLDS) | Lead:  
- ensures that the mentoring requirements are met through the monitoring process and revised as needed to best meet local needs and circumstances, and in accordance with the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)
- provides ongoing support to mentees and mentors
- connects with leads in other boards to share effective practices and learn together about improving mentoring
- strengthens connections between Mentoring and the Board Leadership Development Strategy (BLDS)
- makes connections between mentoring for newly appointed school leaders with other mentoring/coaching activities in the school board (e.g. NTIP, School Support Initiative) | Lead:  
- makes enhancements to mentoring based on monitoring and evaluation results, and in accordance with provincial requirements set out in the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)
- provides continuous support to mentees and mentors addressing specific needs as they arise
- enhances connections with leads in other boards to share effective practices and learn together about improving mentoring
- takes a system perspective on ongoing implementation and alignment of mentoring with other board and ministry initiatives
- embeds mentoring as an integral component of the Board Leadership Development Strategy |
### Mentoring for Newly Appointed School Leaders Implementation Continuum

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<td></td>
<td>Strategy (BLDS)</td>
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<td></td>
<td>• makes connections between Mentoring for newly appointed school leaders and other mentoring/coaching activities in the school board (e.g. NTIP, School Support Initiative) are established and refined as appropriate</td>
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</table>

#### 2. Identification of Mentoring Goals

Mentoring is a key support for newly appointed school leaders which helps to attract the right people to the role. One clearly articulated mentoring goal which links with board improvement goals is developed for the Board Leadership Development Strategy. Refer to the Board Leadership Development Strategy Requirements Manual (2010-11), including the Board Leadership Development Planning Template and Implementation Continuum available at [www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership) for more information.

**Lead:**
- identifies and communicates Board Mentoring goals that are specifically linked with the Board Strategic Plan and Board Improvement Plan for Student Achievement
- monitors and evaluates the extent to which mentoring goals are being met, and continue to meet the needs of the Board Strategic Plan and the Board Improvement Plan for Student Achievement
- refines board mentoring goals, based on monitoring and evaluation results,
- enhances orientation and preparation of mentors and mentees by communicating linkages between mentoring, the Board Leadership Development Strategy and ministry initiatives critical to newly appointed school leaders
- establishes standard procedures for monitoring and evaluating the extent to which mentoring goals are being met, and continue to meet the needs of the Board Strategic Plan and the Board Improvement Plan for Student Achievement
- refines board mentoring goals, based on monitoring and evaluation results, on a continual basis
- includes a standard practice of communicating linkages between mentoring, the Board Leadership Development Strategy and ministry initiatives critical to newly appointed school leaders, as part of the orientation and preparation of mentors and mentees.
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<tr>
<td><strong>3. Establishing Operational Parameters</strong>&lt;br&gt;Establish operational parameters that support Mentoring and meet provincial requirements as set out in the <em>Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)</em>&lt;br&gt;Parameters include:&lt;br&gt;- Identification of the frequency and nature of contact between mentors and mentees&lt;br&gt;- Scheduling and facilitation of mentoring interactions that will take place during and adjacent to district scheduled administrator activities&lt;br&gt;- Provides distance supports to address geographic constraints, considering the use of technology (e.g. SharePoint, Adobe Connect, web conferences)&lt;br&gt;Lead: &lt;br&gt;- establishes the local operational parameters for mentoring, taking into account local circumstances such as geography, demographics, number of newly appointed school leaders, and the number of mentors available.&lt;br&gt;- ensures that a minimum number of face to face contact hours is established and communicated to all participants&lt;br&gt;- establishes and communicates guidelines for supply coverage and travel costs for mentors and mentees</td>
<td>Lead: &lt;br&gt;- monitors and evaluates the extent to which the operation parameters as outlined in the <em>Mentoring for Newly Appointed School Leader Requirements Manual (2010-11)</em> are being met&lt;br&gt;- reviews and refines operational parameters</td>
<td>Lead: &lt;br&gt;- refines board operational parameters as outlined in the <em>Mentoring for Newly Appointed School Leader Requirements Manual (2010-11)</em> based on monitoring and evaluation results, on a continual basis</td>
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<tr>
<td><strong>4. Recruiting/Selecting Mentors</strong>&lt;br&gt;A clear selection process which include criteria for recruiting effective mentors. The mentor must not be in a supervisory role to the mentee. Practicing or retired school leaders may serve as mentors.&lt;br&gt;Lead: &lt;br&gt;- establishes criteria and a clear process for the recruitment and selection of mentors who meet the needs of the board and its mentees</td>
<td>Lead: &lt;br&gt;- refines the recruitment and selection process, taking into account feedback from mentors and mentees&lt;br&gt;- assesses effectiveness of mentors based on monitoring and evaluation results</td>
<td>Lead: &lt;br&gt;- develops a process for ongoing recruitment and selection of mentors and annually reviews and improves the selection process to best meet the needs of mentees, and to encourage experienced administrators to become mentors</td>
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### Mentoring for Newly Appointed School Leaders Implementation Continuum

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<td>Mentors should be reflective, innovative leaders with a minimum of three years experience as a principal or vice principal.</td>
<td>Lead:</td>
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<tr>
<td>Mentors should have experience working with different adult learning styles, and demonstrate the potential to learn the necessary skills and strategies for mentoring.</td>
<td>- establishes and puts in place an organized and timely process for the matching of mentors with newly appointed principals and vice-principals</td>
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<td>- identifies tools to facilitate the matching process (e.g. Self-assessment tools, mentor/mentee profiles)</td>
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<td>- facilitates the matching process, including input from the mentees and mentors and considering the individual needs of mentees (e.g., invite mentors/mentees to identify their strengths and needs) using the OLF as a resource</td>
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<tr>
<td><strong>5. Matching Mentors/Mentees</strong></td>
<td>Lead:</td>
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<td>Lead:</td>
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<tr>
<td>A process for matching mentors with mentees. Mentees should be consulted on choice of mentor. Ideally the match will continue for a period of up to 2 years. Expertise of the mentor should be matched to learning needs of the mentee. Use a matching form for mentors to complete outlining their knowledge and experience relating to the domains of the Ontario Leadership Framework (OLF).</td>
<td>- reviews and revises the matching process and tools in response to feedback from mentors and mentees</td>
<td></td>
<td>- reviews and revises the matching process and tools used to assess the needs of mentees and mentors</td>
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<td>- makes adjustments as needed to address changes in learning needs of mentees and overall needs of the board</td>
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<tr>
<td>Indicators</td>
<td>Implementation</td>
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<tr>
<td><strong>6. Roles and Responsibilities of Mentors and Mentees</strong></td>
<td>Mentors and mentees:&lt;br&gt;• have a clear understanding of their roles and the expectations of mentoring within the board  &lt;br&gt;• demonstrate an understanding of effective leadership practices and competencies as outlined in the Ontario Leadership Framework (OLF)  &lt;br&gt;• identify areas of focus for the first year of mentoring, through the use of a learning plan (may begin with a focus on technical aspects of the leadership role through his/her interaction with mentor)  &lt;br&gt;• demonstrate knowledge of various mentoring approaches learned from each other through their interactions and relationship building</td>
<td>Mentors and mentees:&lt;br&gt;• refine their focus of mentoring considering both the technical and adaptive aspects of the leadership role (e.g., transition to the role, building leadership practice, implementing key initiatives)  &lt;br&gt;• continue to document learning goals and progress through the use of a learning plan  &lt;br&gt;• adopt new practices and competencies from the OLF as they progress through the mentoring relationship</td>
<td>Mentors and mentees:&lt;br&gt;• commit to a long-term, sustained mentoring process for a period of up to two years, using a range of mentoring approaches  &lt;br&gt;• review and refine their focus on practices and competencies outlined in the OLF through participation in mentoring  &lt;br&gt;• provide ongoing feedback to enhance mentoring implementation as part of board monitoring and evaluation strategy</td>
</tr>
<tr>
<td>Mentoring is an iterative process and is modified to meet the changing needs of the newly appointed school leader. The Mentor is responsible for providing mentoring that focuses on both adaptive and technical aspects of the leadership role. The Mentee is responsible for participating with the mentor in a collaborative manner to learn adaptive and technical aspects of the leadership role.</td>
<td>Mentors:&lt;br&gt;• understand a variety of mentoring approaches, and how to apply them in various circumstances &lt;br&gt;• reflect upon their own practices as a school leader to help inform the mentoring process</td>
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<tr>
<td><strong>7. Initial and Ongoing Assessment of Mentee Learning Needs</strong>&lt;br&gt;Boards support mentees in assessing their learning needs.&lt;br&gt;Learning assessment guides the work of the mentor and mentee.&lt;br&gt;Use a needs assessment tool to inform the match between the mentor and mentee. In-depth learning assessments are used to focus the mentoring work. Learning needs are re-assessed on an ongoing basis.</td>
<td>Lead:&lt;br&gt;• establishes a process and identifies and shares tools that can be used to assess mentee learning needs (e.g. preliminary learning assessment to inform matching and in-depth learning assessment when mentoring begins) and guide the mentoring process&lt;br&gt;Mentors:&lt;br&gt;• work with mentees to identify needs and interests</td>
<td>Lead:&lt;br&gt;• monitors activity to ensure that ongoing assessments are being used to guide the mentoring process&lt;br&gt;Mentors:&lt;br&gt;• work with mentees to assess learning needs on an ongoing basis and revises focus based on shifting needs and interests</td>
<td>Lead:&lt;br&gt;• continues to seek out effective learning assessment tools and build these into mentoring process&lt;br&gt;• revisits the learning needs assessment tools and timelines as needed to best guide the mentoring process&lt;br&gt;• continues to monitor activity to ensure that ongoing assessments are being used to guide the mentoring process&lt;br&gt;Mentors:&lt;br&gt;• work with mentees to assess learning needs on an ongoing basis and revise and refine focus based on shifting needs and interests&lt;br&gt;• provide ongoing feedback to the mentoring lead about the effectiveness of the learning assessment tools and the implementation process</td>
</tr>
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<td><strong>8. Joint Orientation</strong>&lt;br&gt;Mentoring expectations (role of the mentor and what the mentee can expect of the mentor) are clearly communicated to mentor and mentee. Orientation provides foundation for ongoing professional learning (e.g. building trust, confidentiality, the learning plan, the OLF and exit process).</td>
<td>Lead:&lt;br&gt;• develops and provides an orientation process for mentees and mentors and acquires and distributes required resources</td>
<td>Lead:&lt;br&gt;• monitors the effectiveness of the orientation process by seeking feedback from mentors and mentees&lt;br&gt;• annually reviews and revises the orientation process for mentees and mentors based on monitoring and evaluation results</td>
<td>Lead:&lt;br&gt;• continues to monitor the effectiveness of mentee and mentor orientation&lt;br&gt;• continuously refines the orientation process in order to best meet needs of mentees and mentors based on monitoring and evaluation results</td>
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</tbody>
</table>
### Mentoring for Newly Appointed School Leaders Implementation Continuum

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<thead>
<tr>
<th>Indicators</th>
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<tbody>
<tr>
<td><strong>9. Training of Mentors</strong></td>
<td>Lead:</td>
<td>Lead:</td>
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<td>Every mentor <strong>must</strong> have high-quality, specific training (e.g.; certified, accredited) before mentoring begins, and on an ongoing basis as necessary to refine and upgrade skills. Training is provided by <strong>certified</strong> internal or external trainers as offered by principal associations and other providers.</td>
<td>• must ensure that every mentor receives certified training that focuses on the mentoring approaches (e.g. coaching, mentoring, consulting, facilitating and collaborating) that is offered through the associations or other providers</td>
<td>• coordinates certified training (offered by associations or other providers) to experienced mentors to refine and update their skills</td>
<td>• monitors the effectiveness of training on an ongoing basis</td>
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<td>• assesses and adapts training to meet specific needs of new and experienced mentors based on monitoring and evaluation results</td>
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<td>• promotes and facilitates joint training for mentoring across the board in collaboration with NTIP, SS/L18 and LSA</td>
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<td><strong>10. Ongoing Professional Learning (PL) and Resources</strong></td>
<td>Lead:</td>
<td>Lead:</td>
<td>Lead:</td>
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<tr>
<td>Mentors, mentees, and the board mentoring lead engage in ongoing professional learning opportunities related to mentoring that are reflective of current research and school, board and provincial priorities. Professional learning for mentors and mentees both enhance the mentee growth and development as well as the mentor’s learning experience.</td>
<td>• arranges ongoing professional learning (PL) for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities that are specific to the needs of mentors and mentees</td>
<td>• promotes ongoing PL (e.g. Emotional Intelligence, Conflict Resolution, Teacher Performance Appraisal) coordinates PL for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities and focuses on the changing needs of mentees and mentors (1st and 2nd year)</td>
<td>• monitors and modifies PL for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities</td>
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<td>• assesses effectiveness of PL and resources through monitoring and evaluation data and either adapts existing resources or provides new resources based on feedback from mentors/mentees through PL and mentoring resources, with other mentoring initiatives within the board (e.g. NTIP, SS/L18)</td>
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<td></td>
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<td>• aligns PL and mentoring resources, with other mentoring initiatives within the board (e.g. NTIP, SS/L18)</td>
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</tbody>
</table>
### 11. Supporting Mentee Learning Plans

Every mentor and mentee must use a learning plan document to guide the mentoring process. The learning plan:
- is one of the first things the mentor and mentee do to guide the mentoring process
- is used to focus mentoring interactions and growth and development of the mentor
- reflects the learning needs of the mentee identified through the learning assessment
- is reviewed on a regular basis to determine progress and identify changes in learning needs and interests of the mentee

**Lead:**
- identifies the roles and responsibilities of mentors and mentees in developing and using a learning plan document
- explains the purpose and benefits of using the learning plan or log to mentees and mentors
- provides mentees and mentors with the ministry or board-developed learning plan templates
- Monitors mentoring activity to ensure that the learning plan document is being used

**Mentees and mentors:**
- use the ministry or board-developed learning plan in order to guide and monitor their growth and achievement of identified goals in order to ensure mentees’ learning needs are being met
- review the learning plan document in order to identify changes in learning needs and interests of the mentee

**Lead:**
- reinforces importance and value of documenting progress towards achieving mentees’ goals in the learning plan document

**Mentees and mentors:**
- use the ministry or board-developed learning plan template in order to sharpen their focus, to guide and monitor their growth and progress in achieving identified goals and ensure mentees’ learning needs are being met

**Lead:**
- assesses use and effectiveness of learning plan document and makes modifications (either to learning plan itself, or by providing additional support to mentors/mentees) based on feedback provided through monitoring and evaluation results

**Mentees and mentors:**
- refer continually to the learning plan or log and make changes as needed to ensure mentees’ learning needs are being met and that professional growth and development goals are being achieved

### 12. Exit process

Exit process must be established by board and clearly communicated to mentor and mentee.

**Lead:**
- establishes and clearly communicates the exit process to mentors and mentees
- provides necessary supports to facilitate the exit process to include re-matching if required

**Lead:**
- monitors exit process
- reviews matching process if necessary
- revises exit process if necessary
- communicates changes to mentors and mentees

**Lead:**
- revisits the exit process annually and modifies it as needed to ensure efficacy based on feedback provided through monitoring and evaluation results
- updates the exit process
- communicates and monitors changes to mentors and mentees

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*Mentoring for Newly Appointed School Leaders – Version 3, June 2010*
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| **13. Monitoring and Evaluation** | Lead:  
- conducts a needs assessment to determine strengths and areas of need  
- develops a strategy for monitoring and evaluating success and possible areas of improvement in mentoring  
- identifies and coordinates the development of a variety of methods and tools (e.g., end of year survey) to gather information to assess the board’s mentoring program and its impact on mentors and mentees  
- establishes indicators of successful implementation of mentoring and the achievement of the board’s mentoring goals and effectiveness of board’s mentoring policies  
- communicates board’s monitoring and evaluation strategy based on board’s mentoring goals  

Barriers and issues may be identified and actions to address challenges may be taken by board. Results of monitoring may be used to inform the reports the board is required to submit to the ministry. | Lead:  
- conducts data collection activities, reviews results and modifies relevant components of mentoring based on results  
- takes an active role in finding solutions to barriers or issues that may arise  
- communicates results of the monitoring and evaluation of the mentoring program to mentors and mentees  

| | Lead:  
- continues to conduct data collection activities, reviews results, identifies successes and challenges, and modifies relevant components of mentoring based on results  
- revisits data collection methods to ensure effectiveness and efficiency in obtaining feedback necessary for making improvements in mentoring  
- adjusts goals when required  
- addresses barriers and issues in order to maintain a quality mentoring program |