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MEMORANDUM TO: Council of Ontario Directors of Education
Council of Senior Business Officials

FROM: Nancy Naylor
Assistant Deputy Minister

DATE: September 29, 2006

SUBJECT: Primary Class Size Cap

As you are aware, the implementation of a class size cap for Primary grades, as of the 2007-08 school year, is a key government priority. School boards have worked effectively with the Ministry over the first three years of implementation and funding for this initiative. The Ministry has been preparing a plan to support school boards over the current school year to ensure that boards are in a position to be compliant for the 2007-08 school year.

Our proposed plan for the coming year is outlined in the attached draft B-memo. We are taking the unprecedented step of releasing this B-memo in draft form to seek school board input and feedback before it is released in final form. We have decided to take this step as we recognize that aspects of this plan include new reporting requirements, and a proposed "trial class size planning" exercise mid-year in 2006-07 that will represent a workload requirement for board staff that is not usually present. We are very aware of the significant expectations and workload placed on school boards by the range of important and meaningful initiatives that we are implementing together. However, we also want to ensure that we are offering a well paced and well supported process to achieve an important sector wide implementation.

Briefly, the attached B memo:

- Requests an update of boards' 2006-07 PCS plans, based on the board's own reorganization date in September, and indicates that this data would be used for public reporting and compliance purposes
- Describes funding levels for 2007-08 to support early planning
- Proposes to collect an early version of 07-08 PCS plans in December, 2006
- Responds to requests from boards for policy clarification
- Outlines requirements to finalize PCS capital funding approvals

We would like to invite feedback on the draft B-memo over the next week from directors, SBOs and other interested school board staff. Comments may be directed to Mehul Mehta, Manager, Education Finance Branch, at <mehul.mehta@ontario.ca>.

Deputy Minister Ben Levin is meeting with the CODE executive on October 6 and this plan, along with feedback received, will be on the agenda. Following this meeting, this document, as informed by feedback and discussion, would be released to school boards as a key policy statement to guide school boards as we prepare for full implementation of the Primary class size cap in 2007-08.

As always, we value the on-going co-operation of school boards with this and other initiatives.

Sincerely,

A handwritten signature in black ink, reading "Nancy Naylor". The signature is written in a cursive, flowing style.

Nancy Naylor
Assistant Deputy Minister
Business & Finance Division

Attachment

MEMORANDUM TO: Directors of Education

FROM: Nancy Naylor
Assistant Deputy Minister

DATE: October ##, 2006

SUBJECT: **Primary Class Size Cap:**
(1) Updating 2006-07 Primary Class Size (PCS) Plans
(2) PCS Funding in 2007-08
(3) Preliminary 2007-08 PCS Plans
(4) Response to policy questions
(5) Pupil Accommodation

I would like to thank you and your staff for submitting your board's Primary Class Size (PCS) Plan for the 2006-07 school year. I am now writing to provide information about further planning, implementation and accountability guidelines for the primary class size cap initiative.

This memorandum (1) requests an update of your board's 2006-07 PCS Plan, (2) describes expected funding levels for 2007-08, (3) requests boards to submit preliminary PCS plans for 2007-08, (4) responds to a number of policy questions that school boards have raised, and (5) requests updated information about your board's PCS-related pupil accommodation needs.

Since 2004-05, the government has made a substantial annual investment in reducing primary class sizes. In each of the past three years, Ontario has provided an average increase in funding of more than \$90M that has supported 1,200 additional primary teachers. In 2006-07, the result is a total provincial investment of \$278M, with 3,600 additional teachers in primary classrooms throughout the province. The government is also providing funding of up to \$50M this year to support an estimated \$700M in capital projects needed for more classroom space.

In planning for 2007-08, boards may expect that the government will again provide funding that, on a province-wide basis, would enable boards to hire an additional 1,200 teachers. The increase in funding that any individual board receives will be comparable to the increase provided this year, adjusted for changes in primary enrolment and to recognize the increased salary base and the province's share of increased preparation time for elementary teachers provided for in the labour framework.

Preparing for implementation of the primary class size cap in 2007-08 is a priority for school boards throughout the next year. The cap is one of Ontario's key initiatives to improve elementary literacy and numeracy, and each board must ensure that it is giving top priority and assigning ample resources to planning, management and reporting activities.

1. Updating 2006-07 Primary Class Size Plans

The information collected in the 2006-07 PCS plans indicates that many boards are making significant progress in reducing primary class sizes. However, the Ministry asked boards to develop plans for 2006-07 that focused on the goal of organizing all primary classes at a size of 23 or fewer students, with as many primary classes as possible at 20 or fewer. This goal was not fully achieved by all boards, in part because a number of primary teachers were not to be assigned to specific schools until early in September.

As placement of these unassigned primary teachers and any reorganization of or establishment of new classes will have had an effect on PCS implementation, the Ministry is requesting that each board revisit its 2006-07 PCS Plan and update the plan with September enrolment and class information. Each board may choose a date in September that reflects the final class organization within its elementary schools.

To update its 2006-07 PCS Plan, your board will need to access the Primary Class Size Plan website at <<https://pcs.edu.gov.on.ca>>. Boards are asked to update these plans no later than [DATE]. See the attached **APPENDIX: Updating 2006-07 PCS Plans**, page 6 below, for more information.

The Ministry intends to use the information from the updated 2006-07 PCS plans to inform parents and the public about progress in reducing primary class sizes. Boards are subject to a grant withholding if they have not used the PCS funding for establishing additional primary classes and for lower primary class sizes.

Boards will still provide elementary class size information to the Ministry at the October 31 count date through OnSIS. While recognizing that enrolment changes and other factors mean that the organization of classes will vary between the updated PCS Plan and the October 31 report, the Ministry will review both sets of data to ensure that there are no significant or unexplained variances.

2. Funding in 2007-08

The expectation for 2007-08 is that all boards will be fully compliant with the class size cap: 90 per cent of primary classes will have 20 or fewer students and up to 10 per cent of primary classes may have up to 23 students. It is also expected that boards will achieve compliance while ensuring that average class size in the other elementary grades (4 to 8) does not increase.

As noted above, boards may expect that 2007-08 funding levels will include a fourth annual increase that will provide the additional resources needed for boards to hire additional teachers to achieve compliance with the cap.

3. Preliminary 2007-08 PCS Plans

The Ministry is asking boards to submit preliminary 2007-08 PCS Plans by **December 15, 2006**, through the Primary Class Size Plan website. You and your board's senior business official will be provided with further information and instructions via e-mail in the near future. It should be emphasized that this will be an important opportunity for school boards to further engage their elementary school principals and superintendents in the planning process.

The Ministry recognizes that this request for primary class organization is made ahead of the normal staffing processes in most boards. However, 2007-08 is the year when full compliance with the cap will be required. This early submission of a plan will give boards an opportunity to develop and assess their 2007-08 staffing plans and to work with the Ministry to optimize their class size in advance of the typical planning and staffing timetable that starts in early spring.

4. Responses to policy questions

School boards have raised a number of questions with respect to full implementation of the cap in 2007-08:

Compliance on a board-wide basis

The standard for compliance will apply on a board-wide basis, not to individual schools. That is, a board will be compliant when 90 per cent or more of all primary classes in the board have 20 or fewer students, with no more than 10 per cent of the board's primary classes having up to 23 students.

Class size in grades 4 to 8

Since 2000-01, the Foundation Grant has provided funding for all elementary (JK to Grade 8) enrolment on the basis of one teacher for every 24.5 elementary students. This funding benchmark of 24.5:1 effectively funded primary classes at an average class size of 24:1 (starting in 2000-01, boards were required to ensure that the maximum average primary class size did not exceed 24 on a board-wide basis), and funded grades 4-8 classes at an average class size of 25.

In 2007-08, funding for grades 4 to 8 will continue to be provided on the basis of an average class size of 25:1. As noted above, boards will be expected to implement the cap on primary classes while ensuring that average class size in other elementary grades does not increase beyond 2003-04 levels or 25:1.

Counting junior kindergarten and kindergarten classes

For purposes of determining compliance (at least 90 per cent of primary classes at 20 or fewer students and no more than 10 per cent of primary classes with up to 23 students), each junior kindergarten, kindergarten, or JK/K combined class will count as 1.0 class.

Students with special needs

A student with special needs who is in a self-contained special education classroom for more than 50 per cent of instructional time will be reported in a special education class, while a student with special needs who is in a regular

class for more than 50 per cent of instructional time will be reported in the appropriate grade with that regular class.

Exemption of programs from cap

Since the introduction of Primary Class Size Reduction Amount funding in 2004-05, funding has been provided on the basis of all primary pupils of the board. All primary classes should therefore be organized in conformity to the compliance guidelines. Programs such as French Immersion will not be exempt from the cap requirements.

Combined grade 3 and 4 classes

Combined grade 3 and 4 classes are currently counted on a prorated basis, with the grade 3 students included in the primary class size calculation and grade 4 students included in the grades 4 to 8 class size calculation. Some school boards have requested that the treatment of these classes be simplified.

In response, the Ministry is proposing to introduce, in 2007-08, a cap of 23 on combined 3-4 classes. These classes would not be counted as primary classes but would be included in the calculation of average class size for grades 4 to 8.

This proposed approach would simplify the measurement of class size but would still ensure the protection of the cap for the Grade 3 students in a 3-4 combined class. The Ministry plans further consultation about this approach.

5. Pupil Accommodation

In the memoranda of June 12, 2006: **B8 – Education Funding for 2006-07**, and June 30, 2006: **SB10 – Primary Class Size Capital Funding Changes for 2005-06 and 2006-07**, school boards were notified of a streamlined allocation approach for the \$50M in funding provided to address boards' PCS capital needs. This funding provides school boards with the opportunity to make a one-time adjustment to their elementary capital stock to reflect the increased space required to support smaller primary class sizes, by either constructing or acquiring new classrooms.

School boards have received an allocation for their PCS capital needs based on a Ministry calculation of the pupil places required to meet the cap.

As part of the revised allocation approach, school boards were asked to review their PCS-related space needs at each elementary school. This review was to determine if the pupil places allocated to a board needed to be adjusted to recognize a range of circumstances that could increase or decrease the need for pupil places. Over this summer, Ministry staff has been in contact with each school board to provide assistance in completing this review. To date, 31 school boards have submitted their Primary Class Size capital needs for the Ministry to review.

The Ministry is asking school boards to submit their primary class size space needs for review by **October 20, 2006**. Where appropriate, a revised allocation of pupil places to meet primary class size space needs may be recommended to the Lieutenant Governor in Council and reflected in a future grant regulation amendment. The Ministry expects to finalize the PCS capital funding allocations for boards by November.

If you require further information, please contact:

Implementation in 2006-07 and 2007-08	Paul Babin	(416) 325-0607 <paul.j.babin@ontario.ca>
	Peggy McCormick	(416) 325-2055 <peggy.mccormick@ontario.ca>
PCS Pupil Accommodation	Grant Osborn	(416) 325-6268 <grant.osborn@ontario.ca>
	Lise Bolduc	(416) 212-1180 <lise.bolduc@ontario.ca>

Through the 2006-07 school year, the Ministry will continue to work in partnership with school boards to ensure compliance with the cap in 2007-08 and to enhance public reporting of progress. The cap on primary class sizes is a key to the government's four-year plan to improve student achievement, and it is important that school boards demonstrate that resources are being used to reduce primary class sizes while maintaining current class sizes in the other elementary grades. I look forward to working with school boards on the final year of implementation of this important initiative.

Nancy Naylor
Assistant Deputy Minister

Copy: Superintendents of Business and Finance
Secretary/Treasurers of School Authorities

APPENDIX: Updating 2006-07 PCS Plans

The PCS Plan website also contains instructions and information to assist boards with updating their 2006-07 PCS Plan. For more information boards are asked to contact their Ministry Finance Officer.

- Current board user names and passwords to develop the 2006-07 Primary Class Size Plan are still valid. If the board requires a list of user names and passwords please contact your Board Finance Officer.
- Updated 2006-07 PCS plans are due **no later than [DATE], 2006**.
- The PCS website application has been modified slightly to accommodate the updating of the 2006-07 PCS Plans. These modifications are:
 - A PDF copy of the Board Input and Board Statistics sections of the 2006-07 PCS Plan submitted in July 2006 is available.
 - The Board Input section of the PCS Plan:
 - Does not provide a field for Board Unassigned Teachers. These teachers should be fully assigned to specific schools and classes.
 - Does not provide a field to identify if the board will be applying for Transitional Program Equivalency Teachers (TPE). All board applications for TPE teachers have been dealt with over the past summer.
 - Now includes a field to identify which date in September 2006 was used as the basis for updating the PCS Plans. This date should reflect the final class organizations within all elementary schools.
- Some boards may wish to reset the current class-by-class organizations for all elementary schools in their 2006-07 PCS Plan and start with a blank form. Other boards may have actual class-by-class organizations for all elementary schools for September 2006 in an existing database and wish to upload a flat file to the PCS Plan. The Ministry can accommodate these requests. For more information please contact Mark Bonham at (416) 325-8571 or Tim Gallivan at (416) 314-0642.