

**2006: B11**

**MEMORANDUM TO:** Directors of Education

**FROM:** Nancy Naylor  
Assistant Deputy Minister

**DATE:** October 20, 2006

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

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This is the final version of the draft B-memorandum that was shared with you on September 29, 2006. I would like to thank directors and school board staff for the helpful and constructive comments the Ministry received. Much of the feedback has been incorporated into this document.

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.

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 after the start of the school year.

As placement of these unassigned primary teachers and any reorganization 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 enrolment and class information as of the board's reorganization date in September or early October. Boards have the flexibility to select the "count date" that best reflects the date at which the board finalized classroom assignments for the 2006-07 school year. The Ministry recognizes that class reorganization to reflect enrolment changes is best finalized early in the school year to avoid disruption for students and teachers.

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 November 3, 2006. See the attached **APPENDIX: Updating 2006-07 PCS Plans** (page 7 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 may be subject to a grant withholding if the PCS funding has not been used to establish 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.

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.

### **3. 2007-08 PCS Plans**

The Ministry is asking boards to submit trial 2007-08 PCS Plans through the Primary Class Size Plan website. The website will be open for this purpose on November 30, 2006. The final date to submit trial plans will be January 31, 2007.

The purpose of this request is to ensure that boards have in place, and have tested, the business processes, such as those related to the allocation of teaching staff to schools, that will be required to achieve compliance with the cap in 2007-08. This will also be an important opportunity for school boards to further engage their elementary school principals and superintendents in the planning process.

To develop its plan, each board is asked to use its projection of its 2007-08 enrolment. In some cases 2006-07 enrolment may be used to construct a trial plan until the board has time to develop 2007-08 enrolment projection. You and your board's senior business official will be provided with further information and instructions via e-mail in the near future.

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.

Boards may also expect that the Ministry will require a final version 2007-08 PCS plans at the end of June 2007.

### **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.

#### *Compliance date*

For purposes of reporting compliance with the cap at full implementation in 2007-08, each board will have the flexibility to choose the date in September 2007 that reflects the final class organization within its elementary schools. This flexibility will reduce the need for re-organizing classes and relocating students during the school year.

#### *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.

#### *Specialty programs*

Some boards have expressed concern that the flexibility of schools to organize classes under the cap will be affected by the presence of programs such as French Immersion. The Ministry plans further consultation about this issue.

#### *Combined grade classes*

The Ministry recognizes that combined grade classes are and will continue to be a feature of class organization in many schools. Combined grades provide an appropriate instructional strategy based on differentiated instruction and a reasonable strategy for achieving compliant class sizes in the primary grades and appropriate class sizes in grades 4-8 while achieving academic objectives.

Combined grade classes present both opportunities and challenges to teachers. Opportunities include the potential for co-operative learning and subject integration represented by a multi-age grouping of students and the possibility of having a student remain with the same teacher for two consecutive years. Examples of challenges include helping students achieve the content expectations for their grade level and covering all the grade-by-grade expectations.

The Ministry is committed to providing enhanced professional resources and support to teachers who are assigned to elementary combined grade classes, and will provide further information in the near future.

#### *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. As noted above, the Ministry is committed to providing additional professional resources and support to teachers of elementary combined grade classes.

## 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, a majority of 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 November 3, 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:

PCS Plans and implementation in 2006-07 and 2007-08	Abby Dwosh	(416) 325-2054 <abby.dwosh@ontario.ca>
	Peggy McCormick	(416) 325-2055 <peggy.mccormick@ontario.ca>
Policy questions	Mehul Mehta	(416) 325-2035 <mehul.mehta@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.

We 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

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## APPENDIX: Updating 2006-07 PCS Plans

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*The PCS Plan website also contains instructions and information to assist boards with updating the 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.
- The 2006-07 PCS plans are to be updated **no later than November 3, 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 or early October 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.