Planning for Improvement: A Handbook for Schools

Revised September 2011
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Dear School Administrators and Teachers:

I am pleased to present this third edition of Planning for Improvement (PFI): A Handbook for Schools. The board’s PFI leadership team has revised the handbook to update the reporting requirements and incorporate additional tips and resources. This new edition gives you a one-stop reference for using the PFI process to improve student learning in your school.

PFI has evolved in the Halifax Regional School Board over the past 9 years, with input from school administrators, teachers, and other experts in the field. It is a living process, which means that this handbook is a living document. As you go through the steps and bring your school’s plan to life, I am confident that you will see positive results in each classroom and with every student you serve. I also expect that your insights will help to shape the process at your school and throughout the board in the years to come.

I thank each of you for the professionalism and teamwork that you bring to the PFI process. I hope this handbook continues to help you in the essential work of transforming good schools to great schools for the benefit of all students.

Carole Olsen
Superintendent, Halifax Regional School Board

September 2011
### TABLE OF CONTENTS

1. **About this Handbook and the PFI Process** ................................................................. 4  
   - Purpose and Audience ......................................................................................... 4  
   - PFI Goals ........................................................................................................ 4  
   - A History of PFI in our School Board ................................................................. 5  
   - Links to the Nova Scotia School Accreditation Program .................................... 6  
   - Provincial Funding ............................................................................................. 7  
   - PFI Cycle ........................................................................................................... 7

2. **Big Ideas in PFI** ........................................................................................................ 9  
   - Accountability ................................................................................................... 10  
   - Assessment ....................................................................................................... 10  
   - Professional Learning Communities (PLCs) ..................................................... 10  
   - Professional Development (PD) ....................................................................... 11  
   - Evidence-Based Decision Making ................................................................... 12  
     - Types of Evidence ......................................................................................... 12  
     - Looking for Meaning in the Evidence ......................................................... 13  
   - Backward Design ............................................................................................... 13  
   - Continual Improvement .................................................................................... 14  
   - Student Engagement ......................................................................................... 16

3. **Roles** ....................................................................................................................... 17  
   - School-Based PFI Team .................................................................................... 17  
     - Principal ....................................................................................................... 18  
     - Teachers ....................................................................................................... 18  
     - School Advisory Council (SAC) ................................................................. 18  
   - Peer Review Team ............................................................................................. 19  
   - PFI Leadership Team ........................................................................................ 19  
   - Other Central Office Staff ............................................................................... 20  
     - PFI Facilitator .............................................................................................. 20  
     - PFI Consultant ............................................................................................. 20  
     - Research and Data Consultants .................................................................... 21  
     - Assessment and Evaluation Facilitator ......................................................... 21  
     - School Administration Supervisors ............................................................... 21  
   - Program Staff .................................................................................................. 22  
     - Coaches ....................................................................................................... 22

4. **Completing the School Self-Assessment** .................................................................. 23  
   - Process ............................................................................................................ 23  
   - Understanding the Context ............................................................................. 24  
     - Our Community ............................................................................................ 24  
     - Our School .................................................................................................... 24  
   - Assessing School Effectiveness ...................................................................... 24  
     - Gathering, Interpreting, and Reporting the Evidence .................................... 24  
     - Category 1: Implementation of the Public School Program (PSP) .............. 27  
     - Category 2: Assessment and Evaluation ..................................................... 29  
     - Category 3: Strategies for Student Achievement ......................................... 31  
     - Category 4: Safe and Inviting Learning Environments .................................. 33  
     - Category 5: Family and Community Involvement with the School ........... 35  
     - Category 6: Effective Communication .......................................................... 37  
     - Category 7: Administrative Leadership ....................................................... 39  
     - Category 8: Literacy ...................................................................................... 41  
     - Category 9: Mathematics .............................................................................. 43
5. Developing the PFI Plan ........................................................................................................................................... 47
   Responding to the Six Questions ............................................................................................................................... 48
      1. What are you doing well? ...................................................................................................................................... 48
      2. What trends do you see in the data? ........................................................................................................................ 48
      3. What challenges do you need to address in order to make the greatest difference in student achievement? ... 48
      4. Based on the challenges you identified, what are your goals for student achievement? .................................... 49
      5. What strategies and data will you use to achieve each goal? .................................................................................. 49
      6. How will you involve the SAC, the parents, the students, and the wider community? ........................................ 52

6. Conducting the Peer Review ........................................................................................................................................ 53
   Peer Review Team Membership ................................................................................................................................. 53
   Peer Review Training ....................................................................................................................................................... 53
   Preparing for the Peer Review at the School Site ........................................................................................................... 54
   Receiving the Peer Review Report ............................................................................................................................... 55
   Distributing the Final Documentation .............................................................................................................................. 55

7. Reporting to the Community .......................................................................................................................................... 56
   School and Community Context .................................................................................................................................. 57
   Family and Community Involvement .............................................................................................................................. 57
   Safe and Orderly Environment .................................................................................................................................... 57
   Provincial and Board-wide Assessments ........................................................................................................................ 58
   Classroom Assessment ............................................................................................................................................... 58
   Student Engagement .................................................................................................................................................. 58
   Time Focused on Learning .......................................................................................................................................... 58
   Professional Development .......................................................................................................................................... 59
   Additional School Supports ......................................................................................................................................... 59
   Graduation Rates (high schools only) ........................................................................................................................... 59
   Planning for Improvement .......................................................................................................................................... 59
   Goals and Strategies .................................................................................................................................................. 59

8. Reporting to the Department of Education ................................................................................................................ 60
   Strategies Implemented ............................................................................................................................................... 60
   Data Collected .......................................................................................................................................................... 61
   Budget Allocated ...................................................................................................................................................... 61
   Strategies for the Upcoming Year ................................................................................................................................. 61
   Data to Measure Progress ......................................................................................................................................... 62
   Declaration .................................................................................................................................................................. 62

9. Maintaining a PFI Implementation Portfolio ............................................................................................................ 63
   Purpose ....................................................................................................................................................................... 63
   Contents ..................................................................................................................................................................... 63

10. Obtaining Provincial Accreditation .......................................................................................................................... 65
    Accreditation Team Membership .................................................................................................................................. 65
    Gathering Evidence ................................................................................................................................................... 65
    Preparing for the Accreditation Review ........................................................................................................................ 66

Appendix A. Guiding Principles for RCH in Learning ........................................................................................................ 68
Appendix B. Data Coaching Tips ....................................................................................................................................... 69
Appendix C. Effective Writing Tips ................................................................................................................................... 72
Appendix D. Sources & Recommended Resources ........................................................................................................ 72
1. About this Handbook and the PFI Process

Purpose and Audience

This handbook describes how to engage in the Planning for Improvement (PFI) process at your school in order to:

- create an environment where all students succeed
- build strong and effective professional learning communities
- meet the provincial accreditation requirements.

The handbook has been written for principals, vice-principals, teachers, School Advisory Councils, and everyone else who contributes to the PFI process in every school in the Halifax Regional School Board (HRSB).

The handbook was developed by the board’s PFI leadership team. For information about the PFI leadership team, see chapter 3, “Roles.”

The revised PFI Handbook is posted on the board website on document depot.

PFI Goals

The Halifax Regional School Board is committed to ensuring that every school is engaged in the Planning for Improvement process. It is our cornerstone strategy for thinking about and acting on the board’s conviction that all students can learn and every school can improve—a conviction first expressed by Superintendent Carole Olsen in 2002. That conviction has been reaffirmed in the current five-year vision:

By 2013, every school in the Halifax Regional School Board will demonstrate improvement in student learning. Every student can learn. Every school will improve.¹

In light of the board’s focus on student achievement, the PFI leadership team has developed four system-wide PFI goals to guide and direct the work of all schools (see Figure 1).

¹ For a full discussion of the board’s five-year vision, see Good Schools to Great Schools: Superintendent’s Annual Report, May 2008 (available in long and short versions at http://www.hrsb.ns.ca/content/id/537.html)
Figure 1. Four PFI Goals for All Schools

<table>
<thead>
<tr>
<th>Goal 1: Shared Vision</th>
<th>Demonstrate a common understanding of the Planning for Improvement process.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal 2: Culture of Inquiry</td>
<td>Engage in a culture of inquiry through the work of professional learning communities.</td>
</tr>
<tr>
<td>Goal 3: Evidence-Based Decision Making</td>
<td>Collect and use data to guide Planning for Improvement, to inform classroom instruction, and to demonstrate improved student achievement.</td>
</tr>
<tr>
<td>Goal 4: Partnership &amp; Accountability</td>
<td>Involve the school community and School Advisory Council in the Planning for Improvement process, and communicate regularly about student achievement.</td>
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A History of PFI in our School Board

The Planning for Improvement process is grounded in more than forty years of reflection and research on effective schools, which began in the U.S. in response to the Coleman report on equality in education. (Coleman, 1966) The research has identified several things that schools can do to make a positive difference for all students, regardless of socio-economics or other factors. These are known as the correlates of effective schools. (Lezotte, 1991) They include, for example:

- a clear and focused mission
- high expectations for all students to achieve
- instructional leadership, both from the principal and from teachers
- frequent monitoring of student progress
- maximum time spent on learning (student time on task)
- a safe and orderly environment
- excellent home-school relations.

PFI had its formal beginning in the HRSB in 2002 when the superintendent engaged principals, school staff, and school community members in conversations around two fundamental questions:

- How are we doing?
- How can we improve?

Conversations also focused on the moral imperative of schools (Fullan, 2003), the changing notion of accountability (Earl, 2001), our goals for student achievement, and the need to close the gap between students who succeed and those who are struggling. As a result of this dialogue, a sense of mission and purpose began to emerge. People recognized that in
order to respond to the pressure for increased accountability, and to help schools thrive as learning communities, the whole board needed a disciplined, evidence-based approach to Planning for Improvement.

To determine what kinds of evidence our schools and the school system would need for effective planning and decision making, fifty principals joined with central office staff in a series of professional learning sessions during the winter of 2003. Using research on effective schools as a foundation, the participants identified a number of key indicators of school effectiveness. These were then organized into a resource tool called the school profile.*

In 2008, the key indicators were revised. There are now ten PFI categories of school effectiveness, which are described in chapter 4 of this handbook. The ten categories form the framework for the school self-assessment process, which is the first step in school improvement planning.

In her address to principals in May 2010, Superintendent Olsen emphasized the board’s commitment to ‘stay the course’ with the Planning for Improvement process. She also communicated an expectation for the system to focus on developing instructional leadership and closing the achievement gap for all students. These continue to be the priorities today.

*Note: The school profile that was posted online at myHRSB was discontinued in June 2008. It has been replaced by the school self-assessment framework described in chapter 4.

**Links to the Nova Scotia School Accreditation Program**

As the Halifax Regional School Board was developing a revised approach to school improvement planning, so too was the Nova Scotia Department of Education (DOE). In 2002, the Department of Education developed and piloted the Nova Scotia School Accreditation Program. Following an evaluation of the pilot in 2004, the DOE decided to roll out the Nova Scotia School Accreditation Program to all schools in the province over a five-year period, starting in 2005. The expectation was that all schools across the province would participate in the School Accreditation Program.

The DOE agreed to let the Halifax Regional School Board use its own PFI process, with some modifications, to meet the requirements of the Nova Scotia School Accreditation Program for schools within the HRSB. Although there are differences between the Nova Scotia School Accreditation Program and our board’s PFI process, both approaches have the same intent and some common ground. For example, both processes use an evidence-based approach to decision making; they both emphasize the importance of reflecting on school performance and student achievement; and they both involve setting goals and developing plans for improvement.
**Provincial Funding**

In year one of the five year cycle, the school receives $2000 in provincial funding. These initial funds are to be used to support the work of the PFI team and other teaching staff as they engage in the self-assessment process and develop the school’s PFI plan.

In the second year, once the school self-assessment report has been completed and the PFI plan has been approved by a board-based peer review team, the school receives a base amount of $3000 plus $5 per student, based on the previous year’s enrollment. *The use of these funds must be tied directly to the strategies outlined in the plan.* The PFI plan must describe how the funds will be used. Schools need to keep receipts and an electronic copy of actual transactions because *they will be audited.*

**PFI Cycle**

The PFI process is a cycle that repeats after five years. Figure 2 shows the main steps in the cycle. The figure also shows you where to look in this handbook for details about each step. Following are the year-to-year highlights:

- **In Year 1**, the school-based PFI team completes the school self-assessment, with input from all staff. The school uses the results to develop the PFI plan. The board-based peer review team then provides feedback to the school. The school uses information from the self-assessment, the PFI plan, and other resources to prepare the school’s annual report to the community.

- **In Years 2–4**, the school implements the PFI plan, updating the plan each year, as needed. The school-based PFI team involves all staff in reflecting on the school’s progress toward the goals in the PFI plan. As the school continues to gather evidence, the staff interprets the evidence using the principles of the school self-assessment process that it completed in Year 1. The evidence includes province-wide, board-wide, school-based, and classroom-based assessments, as well as PFI surveys, and other relevant data. If the school achieves its goals, it sets new goals and strategies in consultation with the PFI facilitator. Until then, the school may keep the same goals and strategies, or may refine them. These decisions are reflected in the revised PFI plan. All relevant evidence is kept in the PFI implementation portfolio. The school draws on the evidence when preparing its annual report to the community, its reports to the Department of Education in Years 2 to 4, and its submission for accreditation in Year 5.

- **In Year 5**, the school obtains provincial accreditation by demonstrating its progress toward achieving its PFI goals. The school continues to collect data for the beginning of the next five-year cycle. As in other years, the school completes an annual report to the community, and keeps all relevant supporting information in the PFI implementation portfolio.
Figure 2. Five-Year PFI Cycle

Create the plan (Year 1)
- Complete the school self-assessment

Develop the PFI plan by responding to six questions and setting a budget
- Participate in the board’s peer review

Implement the plan (Year 2)
- Implement the PFI plan, making updates if necessary

Continue implementing the PFI plan, and update it if necessary
- Complete the school’s annual report to the community

Continue implementing the PFI plan, and update it if necessary
- Complete a PFI interim report for the Department of Education

Continue implementing the PFI plan in preparation for provincial accreditation
- Complete a summary report for the Department of Education

Prepare for accreditation (Year 5)
- Maintain the PFI implementation portfolio

- Complete the school’s annual report to the community

- Complete the school’s annual report to the community

- Complete the school’s annual report to the community

- Complete the school’s annual report to the community

- Complete the school’s annual report to the community

- Complete the school’s annual report to the community

- Complete an interim report for the Department of Education

- Maintain the PFI implementation portfolio

- Maintain the PFI implementation portfolio

- Maintain the PFI implementation portfolio

- Maintain the PFI implementation portfolio

- Maintain the PFI implementation portfolio

- Maintain the PFI implementation portfolio, and continue gathering data for the next 5-year cycle

Repeat the cycle...
2. Big Ideas in PFI

The PFI process does not happen in isolation; it is integral to the work of helping students learn, and integral to the work of building a school-wide culture of inquiry that supports improved student achievement (see Figure 3).

This chapter describes some of the key characteristics of a school-wide culture of inquiry. These include:

- accountability to the public
- ongoing professional learning, through professional learning communities (PLCs) and professional development (PD)
- evidence-based decision making
- backward design
- continual improvement
- a clear focus on student learning and strategies for student engagement.

Figure 3. Characteristics of a School-wide Culture of Inquiry
Accountability

Schools and the school board are accountable to the public for demonstrating that all students are getting the education they need in order to meet the expectations of the Nova Scotia Public School Program (PSP). Accountability, however, involves more than gathering and organizing information to describe current school performance and student achievement. Meaningful accountability describes both the current reality and what schools will do to improve school performance and student achievement. This requires schools to use assessment information along with other knowledge and hard thinking to make good judgments. (Earl & Katz, 2006)

Assessment

Various sources of assessment information, both external and school based, are available for use in Planning for Improvement. School energies should be focused on classroom assessment and instruction. Classroom assessment data informs instruction, Professional Learning Community (PLC) discussion, and whole school improvement planning (PFI). The school based data used to inform PFI should include evidence that comes from the systematic records teachers maintain on an ongoing basis to demonstrate and inform student learning and growth.

It is not necessary for schools to develop a separate “PFI” assessment in addition to good common assessment that meets the reliability and comparability checks that PLCs support. (For more information, see supporting mathematics and literacy documents located on Document Depot).

Professional Learning Communities (PLCs)

The world in which our students live, the challenges they face, and the information, ideas and resources they need to thrive in the world, are continually changing. To meet these changing needs, teachers must continually update their knowledge, understanding, skills and strategies. This ongoing need is best supported when schools and school systems function as professional learning communities (PLCs).

There has been a great deal of research and professional writing on the importance of professional learning communities, and how to create vibrant PLCs to support and improve student achievement. Most PLC models describe the need for a shared vision and commonly held values. Most also identify the need for collective inquiry and ongoing reflection in a truly collaborative learning environment. The approach used by the Halifax Regional School Board draws heavily on the work of Dufour, Dufour, Eaker and Many, as outlined in Learning by Doing: A Handbook for Professional Learning Communities at Work.

Simply defined, a professional learning community is “a team whose members work interdependently to achieve common goals linked to the purpose of learning for all.” (Dufour, Dufour, Eaker & Many, 2006, p. 3) The Dufour approach emphasizes the importance of teams, goals, and success for all students, and shows how these three elements are interconnected.
Common assessments are classroom assessments that are created and implemented by a team of teachers operating as a professional learning community. The process begins with the teachers examining their curriculum and identifying what they want their students to learn. Teachers next agree upon what they want to assess, and then determine how the information will be gathered in their classrooms. They collaboratively decide upon the criteria for success and the tool that will be used to evaluate the student work. Once the assessment information is gathered, teachers score this work collaboratively to ensure that the assessment tool is being applied in a reliable way.

Common assessments become common formative assessments when teachers use the information they have gathered to change their teaching practices in order to meet the individual needs of their students.

PLCs use inquiry, reflection, and an evidence-based approach to decision making to determine what the students are doing well and what needs to change in order to improve the achievement of all students. They collect and analyze evidence from many sources (common assessments are one type of PLC activity—see Figure 4), identify where they need to focus their efforts, and then develop and implement effective practices that will have a direct, positive and measurable impact on student learning and achievement. They are action oriented and recognize that learning by doing provides deeper understanding. By their very nature, PLCs are committed to continual improvement.

Professional Development (PD)

Research shows that effective teacher learning improves student learning. Faced with the ever-changing and demanding needs of their students, teachers must continually seek out and try new ways of doing things. This need for ongoing professional learning has redefined our ideas about how to engage in teacher professional development. While there is still a place for the traditional kinds of professional development—through conferences, presentations and one-day workshops—we know that meaningful, long-lasting and effective professional development must involve more than scheduled events and activities. Effective professional development requires self-reflection and ongoing job-embedded professional learning. Job-embedded learning means learning that happens collaboratively throughout the day, in all aspects of the work done by teachers and school administrators—in classrooms, in school-based teams, and in school-wide activities. (Brown Easton, 2004)

Through the PFI process, the professional learning communities in a school identify their professional development needs, and how this will improve student achievement.
Evidence-Based Decision Making

Evidence-based decision making involves the collection and analysis of meaningful data in order to understand problems or needs and make supportable decisions about them. It is through the use of data that schools are able to determine their current reality, identify areas that require focus, and measure progress as they work toward their goals for improvement. The collection and analysis of data from many sources is central to PFI.

Types of Evidence

The school self-assessment process involves gathering and reflecting on three kinds of evidence: context indicators, process indicators, and outcome indicators.

- **Context indicators** measure things that influence learning and teaching, but that aren’t under the direct control of the school. Examples include demographic information about the school community and the surrounding neighbourhood; enrollment trends; and information about the school facilities. Some of this information is provided by central office staff, using the most recently available census data from Statistics Canada. Other information is gathered at the school.

- **Process indicators** describe and measure the beliefs and practices that influence relationships, the school environment, learning and teaching. Schools do have control over these factors. The information is typically collected through consultations, focus groups, and surveys, such as the board-wide surveys of students, teachers and parents. It is also collected by teachers through their daily observations in the classroom and through interactions with other teachers in their professional learning communities.

- **Outcome indicators** describe the levels of student achievement in the school—in other words, how well students are doing in relation to the expected learning outcomes. The information comes from ongoing classroom-based assessments, as well as school-wide, board-wide, provincial and national assessments.

All three types of indicators—context, processes and outcomes—can be explored using both quantitative and qualitative methods.

- **Quantitative methods** produce evidence that can be expressed in numbers and statistics. Examples include student assessment results, attendance patterns, survey results and census data. Conversations about quantitative data focus on such things as frequency, mean, median, mode and special cause.

- **Qualitative methods** produce evidence that describes a situation or phenomenon without measuring it. This type of evidence comes from sources such as interviews, focus groups, case studies, and anecdotal observations. Qualitative methods are useful for capturing ideas, creating meaning and, in many cases, developing a deeper understanding of the issues.

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2 Throughout this handbook, the term parents is meant to include both parents and guardians.
In PFI, both quantitative and qualitative data serve essential purposes. Quantitative data can help schools to scope out the big picture and begin to identify possible areas for closer attention. Qualitative data can then help schools to dig deeper and develop a clearer understanding of the critical issues.

**Looking for Meaning in the Evidence**

Working with the data in the context of school improvement planning can become overwhelming. Often there is a tendency to collect data for the sake of collecting data. The school self-assessment process is designed to guide schools in data collection and analysis. The process enables schools to start with a broad view and ask, “How are we doing overall in key performance areas?” As schools delve into the data, they will find points of interest that require further inquiry, and will then ask:

- What else do we need to know?
- What other kinds of data do we really need to collect to clarify the issue?

Working with different kinds of data in the school self-assessment process enables schools to explore **patterns and relationships** in the evidence about student achievement. Continuing to gather the same kinds of data from year to year enables schools to look for **trends** over time. (See Appendix B, Data Coaching Tips.)

**Backward Design**

The principles of backward design can help schools to visualize the PFI process in very practical ways. Backward design involves “starting with the end in mind”—focusing on desired outcomes first, then thinking about how to get there.

Backward design consists of three key stages (Wiggins and McTighe, 2007):

1. **Identify the desired outcomes or results.** In the school self-assessment process, schools begin by identifying their strengths and challenges, and the specific areas that need improvement. From there, they identify their goals for improvement.

2. **Decide how to measure progress toward the desired outcomes.** Questions for this stage include the following:
   - How will we know we have achieved what we set out to achieve?
   - What does success look like?
   - What data do we need to collect to set a baseline relative to the goal?
   - How will we assess progress along the way?

3. **Identify strategies to achieve the desired outcomes.** Questions for this stage include the following:
   - What new knowledge do we need?
What professional learning activities do we need to engage in to achieve the desired results?

What materials and resources do we need to acquire to support our efforts?

Continual Improvement

The idea of continual improvement is described as a “persistent disquiet with the status quo and a constant search for a better way to achieve goals and accomplish the purpose of the organization.” (Dufour, 2006, p. 4) Through the collection and analysis of evidence, schools identify their current reality, then develop and implement strategies to close the gap between the current reality and the future they seek. Schools measure the impact of their strategies over time, and use the evidence they collect to inform the next stage in the cyclical process of studying, planning and doing. The intent of continual improvement is to create the conditions for ongoing professional learning, enabling teachers and school administrators to reflect on their practices and improve those practices in order to improve student learning and achievement.

Continual improvement is what we expect of our students every day, and what we celebrate when we make measurable progress. To keep up with our students and anticipate their evolving needs, we must model and apply the habit of questioning the status quo and always search for better ways to teach and learn.

In her 2008 annual report, Superintendent Carole Olsen identified ten principles for continual improvement (see Figure 5). These principles relate directly to the four PFI goals named in chapter 1 of this handbook. The principles apply to the work of the school board as a whole, and they also apply in every school and every classroom.
**Figure 5. Ten Principles for Continual Improvement**

| **Shared Vision** | 1. Improved student learning and achievement are the starting points for every decision we make, the measure of our success, and a shared responsibility of every employee of the board. |
| **Culture of Inquiry** | 2. We will strive for excellence and equity in student learning and achievement, and always be aware that “excellence without equity is privilege.” (Urbanski, 2004) |
| **Culture of Inquiry** | 3. Creating the conditions for improved student learning and achievement requires continual improvement at the board, school and classroom levels. |
| **Evidence-Based Decision Making** | 4. We will become a learning organization and focus on building capacity for long-term sustainable change that reaches deeply into every classroom and into the learning experiences of every student in the board. |
| **Evidence-Based Decision Making** | 5. We will continuously monitor our progress, set goals for improvement, and search for innovative solutions to any challenges we encounter. |
| **Evidence-Based Decision Making** | 6. We will not leave anything to chance. Evidence-based decision making, supported by comprehensive and reliable data about student achievement, will ensure that we are closing the gap (achieving equity) and raising the bar (achieving excellence) for learning in all schools. |
| **Partnership & Accountability** | 7. Our strategies for change will be based on research and reflect the best practices in learning and human development, instruction, student assessment and evaluation, equity in learning, professional development, planning for improvement, school leadership, and all aspects of board governance and operations (e.g., communications and community relations, diversity management, facility planning and maintenance, finance, human resource management, policy, and school administration). |
| **Partnership & Accountability** | 8. We will set high expectations for schools and hold them accountable for demonstrating improvement (pressure), and we will improve in our ability to provide schools with the time, resources, knowledge and skills they need to make a difference for every student (support). |
| **Partnership & Accountability** | 9. We will be accountable to the public and ensure that our communications honestly and clearly describe our progress. |
| **Partnership & Accountability** | 10. We will be inclusive and actively seek the valuable contributions that parents, community members and community organizations make to learning and student achievement. |
**Student Engagement**

Since the mid-1980s, a growing body of research in Canada and abroad has examined the relationship between student engagement and academic achievement. When students are engaged in learning and in the life and culture of the school, they are curious about what they are learning and they seek out additional opportunities for growth (Willms et al., 2009). A deeper understanding of student engagement can help schools to set clear goals for student learning, and to support those goals with practical strategies.

Current Canadian research is exploring three kinds of student engagement—social, academic, and intellectual—to determine their influence on learning (Dunleavy & Milton, 2009). Figure 6 describes these three dimensions of student engagement.

**Figure 6. Three Dimensions of Student Engagement**

<table>
<thead>
<tr>
<th>Student Engagement</th>
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<tbody>
<tr>
<td>The extent to which students identify with and value schooling outcomes, have a</td>
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<tr>
<td>sense of belonging at school, participate in academic and non-academic activities,</td>
</tr>
<tr>
<td>strive to meet the formal requirements of schooling, and make a serious personal</td>
</tr>
<tr>
<td>investment in learning.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social Engagement</th>
<th>Academic Engagement</th>
<th>Intellectual Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>A sense of belonging and participation in school life.</td>
<td>Participation in the formal requirements of schooling.</td>
<td>A serious emotional and cognitive investment in learning, using higher-order thinking skills (such as analysis and evaluation) to increase understanding, solve complex problems, or construct new knowledge.</td>
</tr>
<tr>
<td>e.g., I like coming to school every day.</td>
<td>e.g., I try my best in school because I want to get good grades.</td>
<td>e.g., Time flies when I am learning in…</td>
</tr>
</tbody>
</table>

Source: Adapted from Willms, Friesen & Milton (2009), p. 7.
3. Roles

Everyone who has a responsibility for student learning and achievement has a role in Planning for Improvement. Staff at each school and at the board’s central office work in the following teams to support the process:

- In each school, the **school-based PFI team** guides the planning process and implementation of the plan.
- After the school completes its plan in Year 1, a board-based **peer review team** visits the school to review the plan, interview staff, and provide feedback to the school-based PFI team.
- At the board level, the **PFI leadership team** provides overall direction and support to schools.

**School-Based PFI Team**

The school-based PFI team includes the principal, vice-principal, and teacher representatives, and may also include a representative of the School Advisory Council (SAC). Guided by the principal, the members of the team work together to:

- Lead and support the PFI process at the school on an ongoing basis.
- Ensure that all teachers, SAC members, and the school community are informed of the process.
- Attend PFI professional development sessions.
- Coordinate and facilitate the work of teachers as they engage in the school self-assessment process.
- Coordinate and facilitate the work of teachers as they develop the school’s PFI plan in Year 1, and make revisions in later years as needed.
- Support the ongoing implementation of the PFI plan, and the collection of data to monitor progress.
- Keep a PFI implementation portfolio, containing updates to the plan and evidence of the school’s progress and challenges in achieving the goals.
- Prepare for and present evidence to the external accreditation review team in Year 5.
- Update the school self-assessment, as needed.

In addition to the overall PFI responsibilities described above, following are some specific PFI responsibilities of the principal, teachers, and School Advisory Council.
Principal

- Lead the PFI process.
- Ensure that PFI is an ongoing focus at the school.
- Support teachers with implementation of the school improvement plan.
- Allocate and account for resources to support the PFI process.
- Encourage a culture of inquiry by supporting the work of school-based professional learning communities.
- Maintain documentation and evidence about trends in student achievement.
- Coordinate the peer review process in Year 1, together with the chair of the peer review team.
- Coordinate the school’s preparation for the external accreditation review process in Year 5.
- Participate in PFI discussions with central office staff and colleagues.
- Provide details about the PFI process to the next principal who is assigned to the school.
- Complete a report for the Department of Education in Years 2, 3 and 4.
- In consultation with school staff, develop an annual report to the community.

Teachers

- With the support of the school-based PFI team, develop a working knowledge of the PFI process.
- Engage in the school self-assessment process by helping to collect and analyze the data.
- Engage in the development of the school’s PFI plan by providing input to the six questions.
- Have a thorough understanding of the PFI plan and its implications for classroom instruction.
- Actively participate in professional development and professional learning communities that focus on student achievement and that align with the PFI plan.
- Implement strategies and teaching practices articulated in plan in order to improve learning for all students.

School Advisory Council (SAC)

- Develop an understanding of the PFI process.
- Support the school self-assessment process by providing input and feedback on the many sources of data that are collected and analyzed by the school staff.
- Support the development of the PFI plan by providing input and feedback as the school responds to the six questions.
- Meet with and respond to the peer review team in Year 1.
- Ensure that the PFI plan is a regular item of discussion at SAC meetings, to obtain updates on implementation.
- Meet with the external accreditation review team in Year 5 to respond to questions.

**Peer Review Team**

The board-based peer review team includes three or four staff of the Halifax Regional School Board who do not work in the school that is being reviewed. The team is chaired by a principal or vice-principal from another school. The peer review team visits the school in Year 1 to:

- Give feedback on the thoroughness of the school self-assessment process.
- Give feedback on the thoroughness of the school’s PFI plan.
- Look for alignment in the evidence that the school has gathered and interpreted; the goals that the school has identified in response to the evidence; and the strategies that the school has identified to achieve the goals.
- Meet with the school’s PFI team members, with teachers, and with the School Advisory Council to learn their views on the process and content of the school self-assessment and PFI plan.
- Prepare a peer review report that highlights the major findings of the peer review process, and present the report to the school within two weeks of the review.

For more information about the role of the peer review team, see chapter 6, “Conducting the Peer Review.”

**PFI Leadership Team**

The PFI leadership team is led by the superintendent, and includes the following central office staff:

- PFI facilitator
- coordinators of School Administration, Program, Communication, and Diversity Management.
- directors of School Administration, Program and Human Resources
- senior staff advisor.

This team provides the overall direction for Planning for Improvement in the Halifax Regional School Board. The team meets regularly to do the following:

- Learn about current research and best practices in Planning for Improvement.
• Develop the PFI process for schools.
• Work with the Department of Education to align the board’s PFI process with the provincial accreditation process.
• Set the future direction for PFI throughout the board.

The PFI leadership team also provides leadership to the central office staff described below.

Other Central Office Staff

The following central office staff have specific PFI responsibilities, which they carry out under the direction of the PFI leadership team.

PFI Facilitator

• Coordinate the work of the PFI consultant and other staff who support the PFI process.
• Provide professional development and ongoing support to school staff to help them understand and use the PFI process. This includes discussions and coaching related to the following:
  o school self-assessment
  o development of the PFI plan (responding to the six questions)
  o implementation of strategies
  o the collection and interpretation of data.
• Monitor school engagement in the PFI process.
• Liaise with school administration supervisors to share information about the needs and progress of their schools.
• Collect, review and distribute PFI documentation from schools, and provide specific feedback to schools about the documentation. This includes the school self-assessment reports and PFI plans.
• Schedule the involvement of schools in the PFI process, including the timing of peer reviews in Year 1 and external accreditation reviews in Year 5, plus ongoing reporting and monitoring in Years 2, 3 and 4.
• Liaise with the Department of Education
• Coordinate, support and serve on peer review teams.

PFI Consultant

• Support the PFI facilitator with the implementation of the Planning For Improvement process in schools
• Provide professional development and ongoing support to school staff to help them understand and use the PFI process. This includes discussions and coaching related to the following:
  o school self-assessment
  o development of the PFI plan (responding to the six questions)
  o implementation of strategies
  o the collection and interpretation of data.

• Monitor school engagement in the PFI process.

• Liaise with school administration supervisors to share information about the needs and progress of their schools.

• Collect, review and distribute PFI documentation from schools, and provide specific feedback to schools about the documentation. This includes the school self-assessment reports and PFI plans.

• Support the peer review teams and participate as a member.

Research and Data Consultants

• Provide professional development and ongoing support to school staff to help them understand and use data to inform the PFI process and their teaching practice. This includes discussions and coaching related to the following:
  o the collection and interpretation of data to monitor progress
  o school self-assessment
  o development of the PFI plan (responding to the six questions).

• Support the peer review teams and participate as a member.

Assessment and Evaluation Facilitator

• Coordinate board-wide student assessments in literacy and mathematics, and provide board-level and school-level student assessment data.

• Provide professional development to administrators and teachers to help them interpret their assessment results.

• Serve on peer review teams.

School Administration Supervisors

• Supervise and support the work of school principals, who lead the PFI process at the school site. This includes:
  o discussions about completing the school self-assessment, developing the PFI plan, implementing the strategies, and collecting data to monitor the school’s progress
o a review of the principal’s role in implementing the PFI process, as a part of the principal’s appraisal
o a review of the school’s annual report to the community.

- Serve on peer review teams.

**Program Staff**

- Provide ongoing support to school teams as they develop and implement their plans.
- Support the peer review teams and participate as a member.

**Coaches**

- Available to provide ongoing mathematics and literacy support to school teams as they develop and implement their plan.
4. Completing the School Self-Assessment

**Timing:** Year 1 (September to December).

**Process**

School self-assessment is a systematic process for reflecting on school effectiveness and student achievement. Through the self-assessment process, schools identify their strengths and challenges and, based on the evidence, determine areas where they need to improve. The process is collaborative and relies heavily on evidence-based decision making. The result is a detailed report describing the school context and addressing ten categories of school effectiveness.

Figure 7 provides an overview of the school self-assessment framework.

**Figure 7. School Self-assessment Framework**
Understanding the Context

As a starting point, and throughout the Planning for Improvement process, it is important to have a clear understanding of the context in which your students live and learn. You need to consider the context as you reflect on the evidence of your school’s effectiveness. As a guiding question, ask:

*What do we need to know about our community and our school in order to understand our strengths and challenges in relation to the ten PFI categories?*

Our Community

Consider the whole neighbourhood that your school serves, not just the families of students attending the school. Most of this information is gathered by central office staff, using census data published by Statistics Canada. It is updated and posted online at myHRSB when the data is made available to the board. The details include:

- age profile of the school community
- family structure
- languages spoken in the home
- mobility
- highest level of education attained
- household income levels.

Our School

General information about your school can be gathered using board and school records. The details might include the following:

- student demographics—such as enrollment, grades, and languages spoken (available at the school)
- Positive Effective Behaviour Supports (PEBS) data—such as student attendance, student discipline, and harassment reports (available at the school)
- staffing—such as numbers of administrators, teachers, and non-teaching staff (based on the annual allocation provided by School Administration in May)
- finances (based on the annual allocation provided by Financial Services once the board budget has been approved, usually in June or September).

Assessing School Effectiveness

Gathering, Interpreting, and Reporting the Evidence

The school self-assessment process is designed to help you gather evidence, interpret it, and present your findings related to ten PFI categories of school success. For each category, there may be many different kinds of evidence, both quantitative and qualitative. The evidence may include information about processes (such as programs and activities offered
by the school) as well as outcomes (such as student assessment results), at both the classroom level and the school level.

For each of the PFI categories, this handbook offers several guiding statements or discussion points. You don’t need to report on each point. Simply use the discussion points to help you think about the scope and impact of that PFI category in your school. For additional help, see the Data Coaching Tips in Appendix B.

In preparing the school self-assessment report, organize your findings about each category using these three headings:

- **Our Strategies (What we do)**
  What is the school doing currently to address this PFI category, at both the school level and the classroom level? Consider the following for each category:
  - programs and activities that have a direct impact on the category
  - resources, such as people, learning materials, funds and time
  - professional practices, such as professional development and the work of professional learning communities.

  Use the “Our Strategies” section of the template to record your information for each category.

- **Our Data**
  For each PFI category:
  - Identify sources of data that inform the conversations about this category.
  - Outline the results of the data.
  - Where applicable, include charts and graphs to present the data.

  Use the following format to list your findings for each category. Be brief and specific. If you have supporting information that does not fit into this table format, put it in an appendix and assign a number or letter to it. Note the appendix number or letter in the third column.

<table>
<thead>
<tr>
<th>Data Sources (Quantitative &amp;/or Qualitative)</th>
<th>Results</th>
<th>See Appendix (if applicable)</th>
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</table>

- **Our Conclusions**
  Work collaboratively with the school staff to draw clear conclusions based on the evidence. For each PFI category, consider the following:
Based on the evidence, what are our strengths in this area?
Based on the evidence, what are our challenges in this area?
Is there anything else we need to know? What are the gaps in our evidence and our understanding?

Use the following format to list your findings for each category. Be brief and specific.

<table>
<thead>
<tr>
<th>Our Strengths</th>
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<th>Our Challenges</th>
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<tr>
<th>Gaps in Our Evidence and Understanding (if applicable)</th>
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</table>
**Category 1: Implementation of the Public School Program (PSP)**

Consider the following points to guide your discussions and reflections on implementing the province’s Public School Program (PSP).

Use the following framework to report your findings about the school’s implementation of the PSP, and the impact on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Teachers are knowledgeable about, and successfully implement, the curriculum outcomes in the PSP. We know this because:</td>
</tr>
<tr>
<td>a) Instruction is aligned with the curriculum outcomes.</td>
</tr>
<tr>
<td>b) Teachers have a shared understanding of outcomes across all grade levels.</td>
</tr>
<tr>
<td>1.2 Our teachers engage in varied professional development and focused professional learning communities to support implementation of the PSP.</td>
</tr>
<tr>
<td>1.3 Our school’s plans, goals, budgets and classroom resources are aligned to support the implementation of the PSP.</td>
</tr>
<tr>
<td>1.4 We have strategies in place to share curriculum resources among classrooms.</td>
</tr>
<tr>
<td>1.5 Our school schedules reflect the expectations outlined in the provincial <em>Time to Learn</em> document.</td>
</tr>
</tbody>
</table>
### Our Data

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<th>Data Sources (Quantitative &amp;/or Qualitative)</th>
<th>Results</th>
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### Our Conclusions

**Our Strengths**
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**Our Challenges**
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**Gaps in Our Evidence and Understanding (if applicable)**
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**Category 2: Assessment and Evaluation**

Consider the following points to guide your discussions and reflections on student assessment and evaluation.

Use the following framework to report your findings about the school’s approach to student assessment, and the impact on student learning and achievement.

### Our Strategies

<table>
<thead>
<tr>
<th>2.1 Assessment and evaluation strategies are aligned with students’ needs and abilities. We know this because</th>
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<tbody>
<tr>
<td>a) Teachers develop a variety of assessments that address the backgrounds, experiences, learning styles and needs of all students.</td>
</tr>
<tr>
<td>b) Teachers have a process in place to identify barriers to student learning and develop plans to ensure that all students are able to successfully meet the outcomes.</td>
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<tr>
<th>2.2 Teachers and students learn from assessment results. We know this because:</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Teachers use assessment results to plan instructional strategies and content.</td>
</tr>
<tr>
<td>b) Students know what they must do and/or demonstrate to be successful, and can communicate their understanding of how their learning is assessed.</td>
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<table>
<thead>
<tr>
<th>2.3 Assessment and evaluation practices are consistent from classroom to classroom and from grade to grade.</th>
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2.4 We evaluate our assessment methods and tools to ensure that they are fair and unbiased; that they measure the curriculum outcomes; and that they match what we teach.

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Our Data

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Our Conclusions

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Our Challenges
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Gaps in Our Evidence and Understanding *(if applicable)*
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**Category 3: Strategies for Student Achievement**

Consider the following points to guide your discussions and reflections on strategies for student achievement.

Use the following framework to report your findings about the school’s strategies for student achievement.

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<th>Our Strategies</th>
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<tr>
<td>3.1 Teachers set high expectations for all students, with clear targets for success.</td>
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<tr>
<td>3.2 We give serious attention to motivating and engaging students. We know this because:</td>
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<tr>
<td>3.3 At the classroom level, teachers differentiate instruction to meet the needs of all students. At the school level, we have an effective program planning process that addresses the needs of all students.</td>
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<tr>
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<tr>
<td>3.4 We are serious about teacher learning in the service of student learning. We know this because:</td>
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</table>
3.5 Teachers work collaboratively with each other and with parents. We know this because:

   a) Strategies are in place to ensure effective transitions from grade to grade.

   b) Parents are informed and actively involved in their child’s learning.

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**Our Data**

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**Our Conclusions**

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Gaps in Our Evidence and Understanding *(if applicable)*

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Category 4: Safe and Inviting Learning Environments

Consider the following points to guide your discussions and reflections on creating safe and inviting learning environments for students.

Use the following framework to report what the school does to ensure that the learning environment is safe and inviting for all students, and the impact of these efforts on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td>4.1 Respect for diversity is an integral part of the school culture.* We know this because:</td>
</tr>
<tr>
<td>a) Our students have access to learning materials that reflect their own cultural heritage and the diversity of our society.</td>
</tr>
<tr>
<td>b) School displays, assemblies, and events reflect the diversity of our society.</td>
</tr>
<tr>
<td>c) Our students are actively involved in learning about diversity, and are involved in programs designed to address all forms of discrimination.</td>
</tr>
<tr>
<td>d) Students feel that everyone in the school is treated with respect, regardless of their gender, race, language, religion, ability, sexual orientation, or socio-economic status.</td>
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<tr>
<td>e) Our school promotes and supports a variety of extracurricular activities for all students.</td>
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*See Appendix A for the guiding principles of the board’s policy on Race Relations, Cross-Cultural Understanding and Human Rights (RCH) in Learning

4.2 Positive Effective Behaviour Supports (PEBS) are communicated and practiced throughout the school.

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4.3 Teachers review the school’s Code of Conduct annually with students, and it is communicated to parents.

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4.4 Problem solving and conflict resolution are embedded in daily practice.

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4.5 Students feel safe in our school. Our classrooms are safe and supportive learning environments.

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4.6 Students feel that they follow the school’s Code of Conduct.

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Our Data

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Our Conclusions

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Gaps in Our Evidence and Understanding (if applicable)

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**Category 5: Family and Community Involvement with the School**

Consider the following points to guide your discussions and reflections on family and community involvement with the school.\(^3\)

Use the following framework to report on how the school welcomes and involves family and community members, and the impact on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td>5.1 Parents and community members feel welcome in our school.</td>
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<td>5.2 Our school ensures equitable access to school activities.</td>
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<tr>
<td>5.3 Parent involvement reflects the diversity of our school community.</td>
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<tr>
<td>5.4 Our school has a high level of parent involvement.</td>
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<tr>
<td>5.5 Parents are involved in supporting their child’s learning at home.</td>
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<tr>
<td>5.6 We gather feedback from parents in a variety of ways, and use the feedback to inform our plan for improving student achievement.</td>
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\(^3\) Throughout this handbook, the term *parents* is meant to include both parents and guardians.
5.7 Our SAC reflects the diversity of our community.

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5.8 The SAC members are actively involved in supporting the PFI process.

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### Our Data

<table>
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<tr>
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### Our Conclusions

#### Our Strengths

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#### Our Challenges

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#### Gaps in Our Evidence and Understanding *(if applicable)*

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**Category 6: Effective Communication**

Consider the following points to guide your discussions and reflections on effective communication with staff, students and parents.

Use the following framework to report on the school’s effectiveness in communicating with staff, students and parents.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td>6.1 Our school uses a variety of strategies to ensure effective home and school communication. We know this because:</td>
</tr>
<tr>
<td>a) Parents receive information about their child’s curriculum outcomes.</td>
</tr>
<tr>
<td>b) Parents receive information about classroom activities and events well in advance.</td>
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<tr>
<td>c) Parents report that school staff respond effectively to their questions and concerns.</td>
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6.2 Evidence of student learning is reflected in displays throughout the school. 

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6.3 Our school effectively communicates the progress of the school plan for improving student achievement.

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6.4 School administrators work together as a team, communicate effectively and convey consistent messages to staff, students and parents.

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6.5 School administrators effectively communicate and implement school board policies.

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<th>Our Data</th>
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<th>Results</th>
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**Category 7: Administrative Leadership**

Consider the following points to guide your discussions and reflections on school leadership.

Use the following framework to report on school leadership, and the impact on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td><strong>7.1</strong> The school administrative team sets high expectations and provides the supports that teachers need to improve student achievement.</td>
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<td><strong>7.2</strong> The school administrative team leads the PFI process, and equips the staff and community to participate, using the strategies of shared leadership, professional development, and professional learning communities.</td>
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<tr>
<td><strong>7.3</strong> The school administrative team encourages teachers to take on leadership roles in the school.</td>
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<tr>
<td><strong>7.4</strong> The school administrative team encourages students to take on leadership roles in the school.</td>
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</table>
7.5 The school administrative team ensures that racial equity, cross-cultural understanding, human rights and diversity are reflected in the PFI plan, and that RCH principles* are clearly evident in the classroom, in school-based professional development, and in the ongoing work of every professional learning community.

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*See Appendix A for the guiding principles of the board’s policy on Race Relations, Cross-Cultural Understanding and Human Rights (RCH) in Learning.

### Our Data

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<th>Data Sources (Quantitative &amp;/or Qualitative)</th>
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### Our Conclusions

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#### Our Challenges
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#### Gaps in Our Evidence and Understanding (if applicable)
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**Category 8: Literacy**

Consider the following points to guide your discussions and reflections on literacy learning.

Use the following framework to report on the school’s effectiveness in promoting literacy, and the impact on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td><strong>8.1</strong> Literacy assessment data, both formative and summative, is used on an ongoing basis to inform the teacher’s explicit instruction and to provide meaningful and timely feedback to students.</td>
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<tr>
<td>* *</td>
</tr>
<tr>
<td><strong>8.2</strong> A variety of assessment results (from classroom-based, board-wide and provincial assessments) are used to determine areas of strength and areas of challenge in literacy learning.</td>
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<td>* *</td>
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<tr>
<td><strong>8.3</strong> Classroom instruction reflects a balanced approach that includes modelling, explicit instruction, sharing and independent practice (i.e., teachers use a workshop approach).</td>
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<tr>
<td><strong>8.4</strong> Classroom practice promotes a positive climate and attitude towards literacy skill development, and active engagement in learning.</td>
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<td>* *</td>
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<tr>
<td><strong>8.5</strong> Teachers embed literacy skills across the curriculum.</td>
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</table>
8.6 Literacy resources are well used and well maintained. They reflect the literacy learning principles outlined in the provincial curriculum and supporting documents, and support initiatives such as Active Young Readers, Active Readers, Writers in Action, and Literacy Success.

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### Our Data

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### Our Conclusions

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**Our Challenges**
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**Gaps in Our Evidence and Understanding (if applicable)**
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**Category 9: Mathematics**

Consider the following points to guide your discussions and reflections on student learning and achievement in mathematics.

Use the following framework to report on the school’s effectiveness in promoting numeracy and mathematics, and the impact on student learning and achievement.

<table>
<thead>
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<th>Our Strategies</th>
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<tbody>
<tr>
<td>9.1 Mathematics assessment data, both formative and summative, is used on an ongoing basis to inform the teacher’s explicit instruction and to provide meaningful and timely feedback to students.</td>
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<tr>
<td>9.2 A variety of assessment results (from classroom-based, board-wide and provincial assessments) are used to determine areas of strength and areas of challenge in mathematics learning.</td>
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<tr>
<td>9.3 Classroom instruction reflects a balanced approach that includes three lesson styles: direct, guided and open exploration.</td>
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<tr>
<td>9.4 Classroom practice promotes a positive climate and attitude towards mathematics, and active engagement in learning.</td>
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<tr>
<td>9.5 Teachers embed mathematics skills across the curriculum.</td>
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9.6 Mathematics resources are well used and well maintained. They reflect the mathematics learning principles outlined in the provincial curriculum and supporting documents, and support a *constructivist* approach to learning and the development of knowledge. This means that students are able to use the resources to actively develop (construct) their knowledge through hands-on, minds-on exploration of mathematics topics.

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| Our Data |
|---------------------------|-----------------|------------------|
| **Data Sources**          | **Results**     | **See Appendix** |
| (Quantitative &/or Qualitative) |                 | (if applicable)  |
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**Category 10: Social and Personal Development of Students**

Consider the following points to guide your discussions and reflections on supporting the social and personal development of students.

Use the following framework to report how the school supports the social and personal development of students, and the impact on student learning and achievement.

<table>
<thead>
<tr>
<th>Our Strategies</th>
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<tbody>
<tr>
<td>10.1 Our students are developing the knowledge, skills and attitudes they need to become independent, life-long learners.</td>
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<td>10.2 Our students are developing strong critical-thinking skills.</td>
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<tr>
<td>10.3 Our students are confident in expressing and reflecting on their own ideas, perceptions, and feelings. They do this in a variety of ways, including various art forms.</td>
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<td>10.4 Our students use different types of technology to support and communicate their learning.</td>
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<td>10.5 Our students demonstrate an understanding of the relationship between health and lifestyle.</td>
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### Our Data

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<th>Data Sources (Quantitative &amp;/or Qualitative)</th>
<th>Results</th>
<th>See Appendix (if applicable)</th>
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### Our Conclusions

**Our Strengths**
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**Our Challenges**
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**Gaps in Our Evidence and Understanding (if applicable)**
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5. Developing the PFI Plan

**Timing:** Year 1 (January to March).

Writing the PFI plan involves responding to six key questions (see Figure 8), and then developing a budget for the PFI funds you will receive from the province in Year 2. When you update the PFI plan in Years 2 to 4, you do not have to redo the school self-assessment, but you should keep the school self-assessment principles in mind.

Your response to each of the six questions needs to focus on the evidence you collected and analyzed, the conclusions you reached, and the strengths and challenges you identified through the school self-assessment process. Conversations about these questions should happen with the whole staff and within smaller professional learning communities, focusing both on the school as a whole and on specific areas of concern within each PLC. This will lead to a broader and deeper understanding of what you need to do to ensure that all students succeed.

**Figure 8. Six Questions for Developing the PFI Plan**

1. **What are you doing well?**
   
   Write your response in narrative form (one to three pages).

2. **What trends do you see in the data?**
   
   Write your response in narrative form (one to three pages).

3. **What challenges do you need to address in order to make the greatest difference in student achievement?**
   
   Write your response in narrative form (several paragraphs to 1 page).

4. **Based on the challenges you identified, what are your goals for student achievement?**
   
   List at least two key goals—one for literacy and one for mathematics. Based on the evidence, you may also include a third goal (for example, on student engagement, school leadership, or communication).

5. **What strategies and data will you use to achieve each goal?**
   
   For each goal, identify specific strategies and the professional development that your staff will engage in to achieve the goal. Also identify the evidence you will use to monitor your progress toward the goal; when you will collect the evidence; and who will be responsible for collecting it. Use the suggested table format for your response.

6. **How will you involve the SAC, the parents, the students, and the wider community?**
   
   Write your response in narrative form, including both your plans for involving these groups in achieving the goals, and your plans for communicating the school’s progress toward those goals (up to one page).
Responding to the Six Questions

1. **What are you doing well?**
   Acknowledge the strengths that you identified through the school self-assessment process. Consider the following:
   - What is the school doing well? What successes have you identified?
   - How are your students succeeding in literacy?
   - How are your students succeeding in mathematics?
   - Why are these your strengths? What are you doing that contributes to success in this area?

   Write your final response in narrative form (one to three pages).

2. **What trends do you see in the data?**
   In responding to this question, the key word to focus on is *trends*. This question asks you to take a very close look at the many sources of data you have collected through the self-assessment process, and at the patterns and relationships that appear in the data over time. For example:
   - Consider the various surveys that the school has conducted over time with parents, students and teachers. What overall trends can you draw from the survey results?
   - Look at mathematics and literacy data from various sources, including classroom-based, board-wide and provincial assessments. What can you learn from the data? How do provincial and board results compare with data that you have collected at the school and classroom levels?
   - Look at the various types of data in combination. Have your strengths and challenges changed? If so, why? What can you learn from the changes in one PFI category that might help you with challenges in other categories?

   Write your final response in narrative form (one to three pages).

3. **What challenges do you need to address in order to make the greatest difference in student achievement?**
   Through the school self-assessment process, you identified your school’s strengths and challenges. Of the challenges you identified, which ones can you address through the PFI process to make the greatest positive difference in student achievement? In responding to this question, it is important to work collaboratively as a whole school and within school teams to prioritize the school’s challenges and decide which ones you will focus on in your goal setting and planning for improvement. Keep in mind the PFI categories of school effectiveness (summarized in chapter 4, Figure 7).

   Write your final response in narrative form (several paragraphs to one page).
4. **Based on the challenges you identified, what are your goals for student achievement?**

This is where you put all of the evidence and all of your analysis to work to guide you to powerful, collaborative decision making. The result will be two or three clear and specific goals for student achievement that the whole school can embrace—including at least one goal for literacy and one for mathematics.

In writing the school-wide goals for the PFI plan, it is important to focus on results—on what you expect to see from students as a result of your actions (e.g., “Students will demonstrate improvement in…”). Be very careful to avoid “process” type goals. Think about the impact that each goal should have at three levels—the school, the PLC, and the classroom.

In developing your goals, keep these key concepts in mind (Schmoker, 1999):

- Goals must be meaningful and purposeful.
- Goals must be worthy of commitment.
- Goals must be inviting and do-able.
- Goals need to define what must be emphasized in instruction.
- Goals must be measurable and linked to effective assessment.
- Goals must provide regular and timely feedback—with immediate results.

In the final write-up, list your two or three goals. It is not necessary to include a discussion about the goals.

5. **What strategies and data will you use to achieve each goal?**

Strategies are statements of what the school plans to do to achieve the goals identified in Question 4. For each goal, you will identify several strategies. **Be specific, focused and realistic, bearing in mind what you can expect to accomplish within one year.** The strategies may apply to the whole school, or may be specific to a professional learning community. Some strategies may be of a short-term nature while others may have a longer-term focus. Most strategies will focus on instructional practices (e.g., “Teachers will implement…”).

For each goal, consider these questions:

- What do we need to do as a school to achieve the goal?
- What do we need to do as a team (PLC) to achieve the goal?
- What do I need to do with my students—what changes must I make in my teaching—to achieve the goal?

As you develop the strategies, keep in mind that **teacher learning** in the service of **student learning** is at the heart of planning for improved student achievement. Therefore, the strategies need to emphasize collaborative learning and professional development for teachers. Teacher learning that leads to positive changes in the classroom will lead to positive changes in student results.
It is critical that you collect evidence on an ongoing basis in order to monitor your progress toward achieving the goals. Therefore, Question 5 also asks you to identify what data you will collect about each goal, when you will collect the data, and who will be responsible for collecting the data. Ensure that you look at all relevant data. This includes classroom and school data, as well as board and provincial data, where applicable. It may also include data to reflect changes in teacher practice which impact on student learning.

Use the following format in your final response to Question 5.

<table>
<thead>
<tr>
<th>Goal 1:</th>
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<tr>
<td><strong>Strategies to achieve the goal:</strong></td>
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<td>3.</td>
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<tr>
<td><strong>Professional development to support achievement of the goal:</strong></td>
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<tr>
<td>What will staff learn (knowledge, skills, and professional practices)?</td>
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<tr>
<td><strong>Data sources:</strong></td>
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<td>What data will you collect?</td>
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</table>
**Goal 2:**

**Strategies to achieve the goal:**
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2. 
3. 

**Professional development to support achievement of the goal:**

<table>
<thead>
<tr>
<th>What will staff learn (knowledge, skills, and professional practices)?</th>
<th>How will the learning take place (e.g., PLCs, PD, time with coach, etc.)?</th>
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**Data sources:**

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<th>What data will you collect?</th>
<th>When will you collect the data?</th>
<th>Who will be responsible for collecting the data?</th>
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**Goal 3 (optional):**

**Strategies to achieve the goal:**
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**Professional development to support achievement of the goal:**

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<tr>
<th>What will staff learn (knowledge, skills, and professional practices)?</th>
<th>How will the learning take place (e.g., PLCs, PD, time with coach, etc.)?</th>
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</table>
6. **How will you involve the SAC, the parents, the students, and the wider community?**

In responding to this question, consider the following:

- What specific things will you do to actively involve the SAC, the parents, the students, and the wider community in achieving the school’s goals for student achievement?

- How will you communicate the school’s progress toward achieving the goals?

Write your final response in narrative form (up to one page).

**Developing the Budget**

In Year 2, schools receive $3000 plus $5 per student, based on the previous year’s enrollment. This is the total amount of money you will receive to implement your plan. Your plan must include how you will spend these funds. This money must be used to directly support your goals and strategies, and must be spent before accreditation in Year 5.

Total Allotment: $______________

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<th>Budget Item</th>
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<th>Actual Cost</th>
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**Total $**
6. Conducting the Peer Review

**Timing:** Year 1.

Once your school has completed the school self-assessment (chapter 4), developed a PFI plan (chapter 5), and consulted with your PFI, math and literacy support personnel, you will be ready for the board’s peer review. You should notify the board’s PFI facilitator as soon as you are ready to proceed. The purpose of the peer review is to validate and provide feedback on your PFI plan, and to determine a school’s readiness to implement the plan.

**Peer Review Team Membership**

The board-based peer review team includes three or four staff of the Halifax Regional School Board who do not work in the school that is being reviewed. The team is chaired by a principal or vice-principal from another school.

For details about the role of the peer review team, see chapter 3, Roles.

**Peer Review Training**

It is important that the peer review team is fully trained and has a deep understanding of the process and the criteria for good self-assessment and planning for improved student achievement. The team members will participate in a training session that focuses on the following:

- comprehensive school self-assessment using the HRSB school self-assessment process
- expectations in responding to the six questions of the PFI plan
- data sources, collection and interpretation
- goal setting
- implementation strategies.

In addition, the team will receive specific instructions about its role and responsibilities.

The school-based administrator serving on the team is designated as the chair, and is responsible for leading and coordinating the work of the team. The chair ensures that a fair and consistent process is followed and the peer review report is completed and presented to the school within two weeks of the review.
Preparing for the Peer Review at the School Site

The school principal is responsible for coordinating the preparations at the school site. The following steps will help to ensure a smooth process:

1. Communicate with the chair of the peer review team to confirm dates and specific times for the peer review process at the school.

2. Two weeks before the peer review, send a printed copy of the following to each member of the peer review team:
   - school self-assessment report, and a summary of the supporting data
   - draft PFI plan
   - a staff list with teaching assignments.

   The school self-assessment report and draft PFI plan should be on 8-1/2” x 11” paper, three-hole punched and placed in a three-ring binder. Be sure to number the pages. These are working copies, so do not go to the expense of elaborate printing and binding at this point. You can do that later, once the peer review process is completed and you have incorporated the recommendations of the peer review team.

3. Before the peer review, schedule the following meetings and activities with those who will be participating:
   - a brief early morning meeting with staff (five to ten minutes) to allow the peer review team members to introduce themselves and very briefly explain their role
   - brief tour of the school (optional)
   - a meeting with the school administration to discuss the process that the school followed in developing the school self-assessment and the PFI plan. This will allow the peer review team to ask questions about the school self-assessment report and PFI plan, based on their review of the documentation.
   - a meeting with the other members of the school-based PFI team. This will allow the peer review team to ask questions about the processes the team followed and about the documentation the team produced.
   - one-on-one interviews with classroom teachers (20 minutes each) to get their feedback on how they are involved in the PFI process. The Department of Education provides funding for two substitute teachers to free up the teachers on a rotating basis.
   - a meeting with representatives of the School Advisory Council. If SAC members cannot meet during the day, consider a late afternoon, supper, evening meeting or phone interview.
   - a meeting with a group of students, if the peer review team requests this.
School’s Hospitality Checklist for the Peer Review

Arrange for the following supports for both days of the peer review:

- a meeting/working space for the peer review team
- spaces for peer review team members to conduct one-on-one interviews
- access to computer printing
- refreshments, including coffee, tea and water for break times.

Receiving the Peer Review Report

Within two weeks of the review, the school will receive a report from the peer review team, highlighting the major findings of the peer review process. Use this information to revise and finalize the PFI plan and school self-assessment report.

Distributing the Final Documentation

Distribute final copies of the school self-assessment report and PFI plan as follows:

1. Send one hard copy plus an electronic copy of the PFI plan and school self-assessment report to the PFI facilitator. The facilitator will also ensure that the PFI plan is posted to myHRSB, and will forward a copy of the PFI plan to the regional education officer (REO) at the Department of Education, and to the school administration supervisor.

2. File one copy of the revised PFI plan and school self-assessment report in the school’s Planning for Improvement portfolio. Keep an electronic copy of both the plan and report for the school’s records.

3. Give a copy of the PFI plan to the School Advisory Council.

4. Post the PFI plan on the school’s website. (Do not post the school self-assessment report on the school website.)
7. Reporting to the Community

Timing: Every year.

The school’s annual report to the community provides an opportunity to share your school’s story. It is a practical communication tool that can showcase your efforts to improve student achievement, and demonstrate your commitment to being an improving school. The report provides data on the baseline year (2008-2009) as well as the current year, and highlights areas of strength, challenges, and next steps for improvement.

The primary audience is parents. The secondary audiences include neighbours and community groups. The media may also be interested in what you have to say.

In addition, your report will be included in the package of information that the Department of Education uses in the school accreditation process.

The report includes the following sections:

- School and community context
- Family and community involvement
- Safe and orderly environment
- Provincial and board-wide assessments
- Classroom assessment
- Student engagement
- Time focused on learning
- Professional development
- Additional school supports
- Graduation rates (high schools only)
- Planning for Improvement
- Goals and strategies.

See Appendix C for tips on effective report writing.
School and Community Context

In this section, you will describe the context in which your students live and learn. You may choose to describe some or all of the following factors:

- communities that the school serves
- enrollment trends
- staffing
- evidence of diversity (including English as a Second Language)
- programs offered (e.g., French Immersion, International Baccalaureate, Early Learning Opportunities)
- extracurricular activities
- initiatives (e.g., to promote health, the arts, and Race Relations, Cross-cultural Understanding and Human Rights)
- Statistics Canada data
- other important information to set the context for your school

Family and Community Involvement

Refer to category 5 from your self-assessment and from the Planning for Improvement (PFI) survey report. Use data to compare your baseline (2008-2009) and demonstrate the change in this category. You may choose to describe the following:

- ways in which you are encouraging family and community involvement
- ways in which parents/guardians are getting involved with their children’s learning
- examples of involvement that reflect the diversity of your community.

Safe and Orderly Environment

Refer to category 4 from your self-assessment and from the PFI survey report. Use data to compare your baseline (2008-2009) and demonstrate the change in this category. You may choose to comment on:

- school climate
- comments from students, parents/guardians and staff about school safety
- programs or initiatives to support school safety
- equity and respect among students and staff
- Positive Effective Behaviour Supports (PEBS).
Provincial and Board-wide Assessments

The assessment results will be entered centrally. This section will contain results from board-wide and provincial assessments. Use your text to highlight some of the key points about the assessment results, including areas of strength and areas needing improvement. Refer to your assessment data to compare your baseline (2008-2009) and demonstrate the change in this category.

Classroom Assessment

This section should highlight classroom-based assessment that is related to your math and literacy goals. Use data to compare your baseline (2008-2009) and demonstrate the change in this category. The assessments should be:

- ongoing, varied, and systematically collected
- aligned with curriculum outcomes.

Student Engagement

Refer to category 3 from your self-assessment and from the PFI survey report. Use this opportunity to comment on what your school is doing to engage students in order to improve their achievement. For example, consider what your school is doing to increase:

- motivation
- enjoyment and participation in school life
- subject-level engagement
- attendance
- sense of belonging.

Use data to compare your baseline (2008-2009) and demonstrate the change in this category.

Time Focused on Learning

Refer to category 1 from your self-assessment (section 1.5) and from the PFI survey report. Use data to compare your baseline (2008-2009) and demonstrate the change in this category.

You may choose to comment on the following:

- time on task
- your plan to minimize interruptions to learning
- how teachers are effectively using the teaching time
- strategies focusing on school goals.
Professional Development

In this section you may describe the following:

- professional development related to your school goals
- the work of your professional learning communities
- any other professional development that you would like to highlight
- how PD and PLCs have improved student achievement at your school.

Additional School Supports

In this section you can highlight some of the additional supports in place to improve student achievement. These may include:

- people, such as student support workers
- programs, such as extra help or a homework club
- partnerships with service agencies or others
- how these partnerships and supports are affecting student achievement.

Graduation Rates (high schools only)

The table in this section will be completed for you. Use data to compare your baseline (2008-2009) and demonstrate the change in this category.

Planning for Improvement

Explain to parents what PFI means at your school site. Elaborate on how you use data to make decisions about goals, and how you develop strategies that focus on changing teacher practice in order to improve student learning—both now and for the future.

Goals and Strategies

Include your school goals from your school improvement plan. Describe to parents / guardians what teachers will be learning and doing differently. Your strategies will need to be re-written using parent friendly language. Comment on your progress towards your school goals.
8. Reporting to the Department of Education

**Timing:** Years 2 to 4.

The Department of Education requires that all schools complete a report in Years 2 to 4 to document their progress and describe their plan for the following year. These reports provide important information for the accreditation review in Year 5.

The purpose of the report is to identify and comment on the strategies you have implemented, and identify and comment on the data you have collected to inform the process. The report also describes strategies you will implement in the upcoming year, and how you will measure your progress.

A draft of the report must be shared with the School Advisory Council for input and feedback. The School Advisory Council chair and the principal will sign the report. Three signed hard copies must be submitted to the PFI facilitator by June 15th. A copy of the report is filed in the school’s PFI implementation portfolio.

The Planning for Improvement Interim Report Framework is located on Document Depot. The framework is used to report on *each goal* in your PFI plan including:

- Strategies implemented
- Data collected
- Budget allocated
- Strategies for the upcoming year
- Data to measure progress.

**Strategies Implemented**

Outline and comment on the strategies implemented and the impact they have had – what is different as a result of these strategies. (You can also acknowledge obstacles as well as any positive impact if you choose.) Include what is changing in terms of classroom instruction and/or assessment.

For strategies that reference professional development, comment on the type of PD, who was involved, the focus of the PD, what was learned, and how the PD informed practice.
Data Collected

Data Sources

Include a comparison to previous data, if applicable. (Has there been an improvement?) Include charts, graphs and other visuals, where appropriate.

Conclusions

Budget Allocated

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Planned Cost</th>
<th>Actual Cost</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Total $____________________$

Strategies for the Upcoming Year

Goal:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Strategies to achieve the goal:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Professional learning to support achievement of the goal:

<table>
<thead>
<tr>
<th>What will staff learn (knowledge, skills, and professional practices)?</th>
<th>How will the learning take place (e.g., PLCs, PD, time with coach, etc.)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Data to Measure Progress

<table>
<thead>
<tr>
<th>What data will you use to monitor progress?</th>
<th>When will you collect the data?</th>
<th>Who is responsible for collecting the data?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Declaration

Include a declaration at the end of the report to show that the principal and SAC chair have reviewed it.

<table>
<thead>
<tr>
<th>Signature</th>
<th>Name</th>
<th>Position</th>
<th>Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Principal</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>SAC Chair</td>
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</tr>
</tbody>
</table>
9. Maintaining a PFI Implementation Portfolio

Timing: Years 1 to 5.

Purpose
The PFI implementation portfolio provides a concise record of your school’s yearly progress in implementing the PFI plan. It serves several purposes, including the following:

- to prompt school staff to regularly gather and reflect on evidence of the school’s progress and challenges in achieving the goals stated in the PFI plan
- to orient new members of the school-based PFI team, especially a new school administrator
- to inform the school administration supervisor about the school’s work in implementing the PFI plan
- to provide easy access to supporting information if the accreditation review team asks for it in Year 5.

The members of the school-based PFI team share responsibility for maintaining the portfolio.

Contents
The PFI implementation portfolio (electronic or hard copy) begins with:

- your PFI plan
- your school self-assessment
- your PFI interim report to the Department of Education
- your school’s annual report to the community
- a report from each PLC in the school, with a brief description of the following:
  - What was your goal?
  - What did you accomplish?
  - What changes to instructional practice have been implemented?
- PFI survey reports
- assessment data, including:
  - school-wide, board-level, and provincial assessment results
  - samples and results of common assessments that you tried at the school (see the description of common assessments in chapter 2, Figure 4)
Classroom assessments that have been systematically collected.

Keep a clearly dated copy of all information, in both print and electronic formats, so that you can easily find the information at the school for the current year.

Cull the files every year to remove information that is more than five years old; however, be sure to keep information that will help you interpret and report on trends over time.
10. Obtaining Provincial Accreditation

**Timing:** Year 5.

Through the PFI process, all schools within the Halifax Regional School Board work towards meeting the provincial accreditation requirements. Accreditation is an external review of the school’s work and is linked to the school’s PFI efforts and the achievement of the goals set out in the PFI plan. Accreditation is achieved when the school presents convincing evidence to the external accreditation team that it has made significant progress toward the goals.

In year 4, the principal is responsible for preparing a summary report, in consultation with PFI staff, that states why the school should be accredited.

**Accreditation Team Membership**

The external accreditation review team consists of individuals from outside of the Halifax Regional School Board. Typically the members include representatives from the Nova Scotia Department of Education.

The accreditation team reviews all of the evidence presented by the school, meets with school staff in a one-day visit, then advises Regional Education Services whether to recommend or not recommend the school for accreditation.

**Gathering Evidence**

Although the accreditation step does not happen until Year 5 of the ongoing improvement process, your school should be anticipating that step from the very beginning of the PFI process. A thorough and comprehensive self-assessment process, using multiple sources of data, will help you to develop meaningful and measurable goals. The data you collect to measure your school’s progress and success along the way will inform the accreditation review. This data will be reported in several ways, including the original and updated self-assessment reports and the original and updated PFI plans.

It is essential that schools develop and maintain a consistent and systematic process for collecting and organizing classroom-level, school-level, board-level and provincial data. You will need this data to prepare for the accreditation review.
Preparing for the Accreditation Review

The school principal is responsible for coordinating the preparations at the school site. The following steps will help to ensure a smooth process:

1. Contact the PFI facilitator to confirm the date and time for the accreditation review process at the school.

2. Ensure that the school’s PFI implementation portfolio is up to date.

3. Before the accreditation review, schedule the following activities with those who will be participating:
   - introduction of the accreditation team to the whole staff
   - brief tour of the school
   - accreditation presentation. This presentation is led by the principal, with support from the school’s PFI team and the chair of the School Advisory Council. Through the presentation and supporting documents and data, the school team presents convincing evidence that the school has achieved the goals it set through the PFI process.
   - question-and-answer session. This provides the accreditation team with the opportunity to probe and ask clarifying questions about the presentation and the supporting documentation.

The team will write a report and send it to Regional Educational Services for final consideration. Regional Educational Services will notify the school of the accreditation decision within two weeks.

School’s Hospitality Checklist for the Accreditation Review

Arrange for the following supports for the day of the accreditation review:

- a meeting space for the accreditation team to hear evidence in the morning
- refreshments, including coffee, tea and water for break times
“Students journey through our school system only once, and it is up to us to make sure that every school day matters. We have both the power and responsibility to continually improve until we know for certain that our work is making a difference for every school, every classroom, and every student.”

Carole Olsen

(Superintendent’s Annual Report, 2008, p. 55)
Appendix A. Guiding Principles for RCH in Learning

The following principles are outlined in the board’s policy on Race Relations, Cross-Cultural Understanding and Human Rights (RCH) in Learning (2007).

The board’s commitment to positive Race Relations, Cultural Understandings, and Human Rights and Equity in Learning is grounded in our belief that we have shared responsibility for:

- Improving student achievement, supporting the development of lifelong learners, and promoting the rights, dignity and self-worth of every person who is served by our school system.
- Building inclusive learning environments that foster social, intellectual, physical, cultural, emotional and moral development.
- Developing learning environments that value diversity and foster respect among all members of our school community.
- Creating a school system that is responsive to the diverse needs of the communities it serves.
- Working as advocates for social and educational change to improve equity, safety and access to learning that supports the personal development and success of all students.
- Learning about bias, prejudice, stereotyping, harassment and discrimination.
- Actively working to identify and eliminate barriers that undermine the board’s ability to reach its vision for student achievement and equity in learning.
- Building strong and inclusive school, home and community relations that support improved student achievement and the board’s ability to eliminate barriers to the equitable participation of parents and community members in our schools and school system.
Appendix B. Data Coaching Tips

This appendix offers tips for interpreting data and reporting the results.

Understanding the Data

✓ **Define** the need as clearly as you can. What do you want to know? What will have the greatest impact on student achievement?

✓ **Ensure** you know what the data represents in order to discuss your results with staff, students, and parents.

  o For example, on the Canadian Achievement Test (CAT) math and literacy assessments (selected response), *low* means that the student performed below expectations for that concept on this assessment; *competent* means that the student performed within expectations for that concept on this assessment; and *proficient* means that the student performed above expectations for that concept on this assessment. When considering this data for school improvement, schools should focus on moving students from the *low* category to the *competent* category, rather than from *competent* to *proficient*.

  o For the PFI survey, the results are provided as a percentage of individuals who responded in a particular way. So if 80% of parents feel welcomed at the school most or every day, that can be interpreted to mean 80% of parents who responded to the survey feel welcomed at the school most or every day, not that 80% of all parents feel welcomed at the school.

✓ **Scan** your reports to make sure the information is accurate for your school.

  o For example, verify the number of students in a particular grade. It is always better to ask about a discrepancy before you begin examining and interpreting the information.

✓ **Ensure** you know the purpose of the assessment, as this will influence your interpretation.

  o For example, the PFI survey measures opinions about indicators of school effectiveness.

  o The Department of Education (DOE) Grade 6 Elementary Literacy Assessment (ELA) measures functional literacy, whereas the DOE Grade 3 Early Language Literacy Assessment (ELLA) is aligned with early-stage curriculum outcomes. So
if 70% of students are meeting expectations on ELA, that means something very
different from 70% meeting expectations on ELLA.

✓ **Examine** and interpret your data, and think critically about your results. Ask questions
such as these:

  o What strikes you about these numbers? Does anything surprise you? If so, why
does it surprise you?

  o Where are the highs, mediums, and lows?

  o Is it consistent or inconsistent across internal/external assessments and across
time?

  o How is this data connected to your plan for improvement? Is it related to a high-
leverage goal? In other words, will it have a significant impact on student
achievement?

✓ **Pay attention** to the number of individuals who participated. Keep in mind that if there
are only a few students writing an assessment, even one student’s score can skew the
results. This may, in turn, affect the year-to-year comparisons.

✓ **Discuss** with others in your professional learning community why you think things
look the way they do. Once you have some potential explanations for particular
challenges and strengths, look at other possible sources of data to support or refute
your assumptions. Discuss what additional information is needed to see whether the
explanation is valid. What might be required to improve the results?

✓ **Dig deeper** for answers when there are pervading questions about the data. Digging
deeper represents the teasing-apart process that occurs as the data is viewed from
multiple perspectives, across grade levels and student genders. It also sometimes
means that more information will be needed to determine the real issues.

  o For example, if 54% of parents indicated they do not receive regular feedback on
how their child is doing in school, then the next step would be to ask parents what
they meant. This could include holding a focus group, surveying your parents on
the topic, or gathering more information in other ways.

**Presenting the Data**

Usually your external assessment data comes to you in a way that can be readily
interpreted. Occasionally it needs to be recombined to make the data more meaningful. For
example, with the PFI survey you may wish to combine the percentages of those who
*usually* and *always* agree in order to target a specific group of scores that met or did not
meet your target. Consider the following:
✓ **Remember** not to average stanine grades or percentile ranks, or to create total scores across measurement strands on external assessments. (For a definition of *stanine*, see the Glossary of Terms in Appendix E.)

✓ **Use graphing** to examine your data over time on the same assessment. Remember that, for each type of data, some graphing methods are better than others. For example:

  o Use a *bar graph* to represent categories of data, such as grade level.

  o Use a *line graph* to represent data over time on the same measure/question from one assessment.

✓ **Know** the difference between *x percent* and *x percentage points*, and use the correct term to convey your information. For example, if 30 percent of the students did something last year and 45 percent did it this year, then that’s an increase of 50 percent or 15 percentage points, not 15 percent. To avoid misleading your readers, pick one way to describe increases and decreases (percent or percentage points), and use it consistently.

**Drawing Conclusions**

✓ **Base** your conclusions on more than one piece of evidence. Compare your conclusions across internal and external assessments. Are these conclusions consistent with one another?

✓ **Consider** the audience for your findings. Use plain language for your descriptions, and use clear and concise titles on graphs.
Appendix C. Effective Writing Tips

This appendix offers tips for writing effective reports and letters, including your school’s annual report to the community. It includes how to organizing organize the content, write clearly, and proofread to ensure consistency.

Choosing and Organizing the Content

When you are deciding what details to include in a report or letter, prioritize your key points and put the strongest or most important points up front where readers are most likely to see and remember them. Put the least powerful points later so that you can easily delete them if you run out of room, without having to rewrite the rest of the text. Do not bother to recap or include a conclusion at the end of a section. This is the way that most newspaper articles are organized. Many journalists call it the inverted pyramid.

The Inverted Pyramid

```
Stop
"
"
"
Next most important
Most important supporting point
Conclusion
```

Writing Conversationally

Speak to Your Readers

Write in a polite, conversational style that speaks directly to your readers. Use “we” where appropriate to describe the school staff or school community.

Use Clear, Everyday Words

George Orwell once said, “Never use a long word where a short one will do.” That’s because shorter, everyday words are generally more familiar to your readers, quicker to understand, and more precise. See the following table for examples of words and phrases to avoid, and what to use instead.

---

### Prefer Short, Simple Sentences

Short, simple sentences improve the clarity of your writing because they are easier to write grammatically, easier to read, less likely to bury important ideas, and punchier than long sentences. A variety of sentence lengths is natural in good writing, but aim for an average of **15 to 20 words** per sentence, and **one main idea**.

### Activate Your Sentences

Prefer the active voice (avoid passives). For example, instead of saying “the plan was approved by the council,” say “the council approved the plan.” Typically, the passive voice is appropriate about 10–15 percent of the time.

### Connect Your Ideas

Connectives are the words that connect one idea to another. They are the glue that holds your sentences together. Connectives also show the direction of your ideas—whether you are headed in the same direction (**and, also, similarly**), or in a different direction (**but, however, on the other hand**).
Here are two tips that might surprise you:

- Grammatically speaking, it is absolutely okay to start sentences with *and, but, or however*. You’ll see examples in just about every newspaper and magazine, and in many books. You are not obliged to do this in your report, but it is fine to do so as long as the sentences are complete.

- It’s helpful to repeat key words. In fact, it’s often wise to avoid synonyms because they can seriously confuse your reader. For example, the words *project, initiative,* and *proposal* may all refer to the same thing, but they may not. Don’t make your readers guess. Pick one term and use it consistently, or use a clear pronoun.

**Proofreading**

*Use a Canadian Spell Checker*

Make sure your computer’s spell checker is set to Canadian English. To do this in Microsoft Word 2003, go to Tools, Spelling and Grammar, then select English (Canada).

Automatic spell checkers are great, but you still need to proofread to ensure that you’ve used the right words for the context, and to apply conventions that may be different from the ones used by the spell checker.

**Follow Style Conventions**

In some cases there is more than one right way to spell a word or punctuate a sentence. The key is to be consistent. Check the following conventions to ensure that your report is consistent with other school annual reports that will be published by the board. The conventions include some tips for using words precisely and avoiding common misuses.

<table>
<thead>
<tr>
<th>Term</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>African Nova Scotian</td>
<td>Spell it out, rather than using <em>ANS</em>.</td>
</tr>
<tr>
<td>analyze</td>
<td>Use a <em>z</em>, not an <em>s</em>. (See “realize” and “recognize,” below.)</td>
</tr>
<tr>
<td>behaviour</td>
<td>Include the <em>u</em>.</td>
</tr>
<tr>
<td>between / among</td>
<td>Use <em>between</em> when referring to two people or things. Use <em>among</em> when referring to more than two people or things. For example:</td>
</tr>
<tr>
<td></td>
<td>- The award is shared between the two classes.</td>
</tr>
<tr>
<td></td>
<td>- The award is shared among all the senior classes.</td>
</tr>
<tr>
<td>board-wide assessments</td>
<td>Say <em>board-wide assessments</em> rather than <em>HRSB assessments</em>. The HRSB initials may not be familiar to all readers.</td>
</tr>
<tr>
<td>bus cluster</td>
<td>Don’t use it! Explain what you mean in plain language.</td>
</tr>
<tr>
<td>coordinate</td>
<td>No hyphen.</td>
</tr>
<tr>
<td>cooperate</td>
<td>No hyphen.</td>
</tr>
<tr>
<td>counsellor</td>
<td>Double <em>l</em>.</td>
</tr>
<tr>
<td><strong>data</strong></td>
<td>Treat <em>data</em> as a singular noun, like <em>information</em> (“the data is available online,” not “the data are available online”). According to the <em>Oxford Canadian Dictionary</em>, the singular version is now dominant, except in scientific publications.</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td><strong>English as a Second Language</strong></td>
<td>Initial caps.</td>
</tr>
<tr>
<td><strong>enroll / enrollment</strong></td>
<td>Double <em>l</em>.</td>
</tr>
<tr>
<td><strong>evidence-based decision making</strong></td>
<td>You probably won’t need to use this term in your report; but if you do use it, hyphenate <em>evidence-based</em> and use lower case.</td>
</tr>
<tr>
<td><strong>extracurricular</strong></td>
<td>No hyphen.</td>
</tr>
</tbody>
</table>
| **fewer / less** | Use *fewer* when referring to something that can be counted. Use *less* when referring to things or qualities that cannot be counted individually. For example:  
  - Fewer students attended the event this year.  
  - The school has less equipment than it did last year. |
| **focused** | One *s*. |
| **French Immersion program** | Initial caps on *French Immersion*; lower case for *program*. |
| **Grade x** | Use an initial cap for *Grade* and a digit for the grade level (e.g., Grade 2). Use initial caps for *Grade Primary*. |
| **high school** | Lower case, except when referring to the proper name of a school. |
| **in-service** | Hyphenate it, but also explain what you mean. Educators and healthcare professionals tend to use it as a noun, meaning *training or professional development during the workday*. But *in-service* began life as an adjective needing a noun to make it clear and complete. Some readers won’t understand the term, or will consider it to be jargon. |
| **International Baccalaureate program** | Initial caps for *International Baccalaureate*; lowercase for *program*. Do not say IB, unless you spell it out first. |
| **Internet** | Initial cap. |
| **language arts** | Lower case for this and most other program names. Only use initial caps when referring to the proper name of a course. For example:  
  - The students learn language arts in all subjects.  
  - In Grade 7 Language Arts… |
<p>| <strong>Learning Centre</strong> | Initial caps. For <em>Learning Centre teacher</em>, use lower case for <em>teacher</em>. |
| <strong>lunchtime</strong> | One word. |</p>
<table>
<thead>
<tr>
<th>Term</th>
<th>Correct Usage</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>math or mathematics</td>
<td>Either is fine for the tone of the school annual reports, especially because space is limited. In a more formal report, it would be conventional to spell out the word mathematics. Use lower case for either word, as well as for most other subject and program names.</td>
<td></td>
</tr>
</tbody>
</table>
| Mi’kmaq / Mi’kmaw           | Use Mi’kmaq for the plural noun. Use Mi’kmaw as an adjective or singular noun. For example:  
- They are Mi’kmaq.  
- She is a Mi’kmaw.  
- They are learning the Mi’kmaw language. |                                                                                                                                                                                                       |
| modelling                    | Double l.                                                                     |                                                                                                                                                                                                       |
| online                       | No hyphen.                                                                    |                                                                                                                                                                                                       |
| percent                      | One word in text (not per cent). If you prefer, it is fine to use the symbol (%) in the text when it appears with a number, especially when space is limited. Use the symbol in tables for brevity. |                                                                                                                                                                                                       |
| Planning for Improvement process | Use initial caps when referring to the board’s Planning for Improvement process, but lower case for terms like improvement planning and plans for improvement. Note that the word process is in lower case. |                                                                                                                                                                                                       |
| post-secondary               | Use a hyphen.                                                                 |                                                                                                                                                                                                       |
| practice (noun) / practise (verb) | The practice is at lunchtime. The teams practise at lunchtime. |                                                                                                                                                                                                       |
| Primary                      | Initial caps for Grade Primary. See “Grade x,” above.                       |                                                                                                                                                                                                       |
| program                      | Not programme.                                                               |                                                                                                                                                                                                       |
| Public School Program        | Initial caps for Nova Scotia’s Public School Program.                        |                                                                                                                                                                                                       |
| Reading Recovery             | Initial caps. It is not necessary to include the registered trade mark symbol ® after the name. The software program that will generate the school annual reports is not set up to reproduce that symbol. |                                                                                                                                                                                                       |
| realize                      | Use a z, not an s.                                                           |                                                                                                                                                                                                       |
| recognize                    | Use a z, not an s.                                                           |                                                                                                                                                                                                       |
| School Advisory Council      | Initial caps. If you need to use SAC to save space, be sure to spell it out in the first occurrence and put the initials in brackets. |                                                                                                                                                                                                       |
| school work                  | Two words.                                                                   |                                                                                                                                                                                                       |
| school year                  | Two words.                                                                   |                                                                                                                                                                                                       |
| speech-language pathologist  | Use a hyphen and lower case.                                                 |                                                                                                                                                                                                       |
| special education            | Lower case.                                                                  |                                                                                                                                                                                                       |
staff  Treat it as a singular noun (“the staff is eager” not “the staff are eager”).

Time to Learn  Initial caps for the provincial guideline.

vice-principal  Lower case and with a hyphen.

website  One word; lower case.

**Acronyms and Initialisms**

Avoid acronyms and initialisms, even the ones you use every day at school. Be especially careful to avoid using more than one acronym or initialism in the same paragraph or section of the report. If you do use an acronym or initialism (for example, to save space in a topic), always spell out the full name in the first occurrence, then put the abbreviated version in parentheses after the full name. Don’t use periods (e.g., *PEBS*, not *P.E.B.S.*).

**Contractions**

Given the conversational tone of the school annual report, it’s fine to use contractions such as *it’s*. It is also fine to spell out the words in full.

**Dates**

Do not use a comma for dates that consist only of a month and year (e.g., March 2010).

Do use a comma before and after the year if the date includes the month/day/year (e.g., “Students who complete the program before March 30, 2010, will be eligible.”)

**Job Titles**

Use lower case for titles, such as principal, vice-principal, educational program assistant, student support worker, resource teacher, literacy coach, math coach, speech-language pathologist, and superintendent.

**Numbers**

In text, use words for one to nine (except when referring to Grades 1 through 9), and digits for 10 and up. In tables, generally use digits. If there is a combination of numbers below and above nine, then use digits for all. Also use digits for percentages in the text. If a sentence starts with a number, spell it out.

When formatting a list, generally use bullets and not numbers for the list items. Use numbers only if the sequence matters, as in a procedure or list of priorities. For example:

<table>
<thead>
<tr>
<th>Do this…</th>
<th>Don’t do this…</th>
</tr>
</thead>
<tbody>
<tr>
<td>• apples</td>
<td>1. apples</td>
</tr>
<tr>
<td>• oranges</td>
<td>2. oranges</td>
</tr>
<tr>
<td>• bananas</td>
<td>3. bananas</td>
</tr>
</tbody>
</table>
**Percentages**

Know the difference between \( x \) percent and \( x \) percentage points, and use the correct term to convey your information. For example, if 30 percent of the students did something last year and 45 percent did it this year, then that’s an increase of 50 percent or 15 percentage points, not 15 percent. To avoid misleading your readers, pick one way to describe increases and decreases (percent or percentage points), and use it consistently.

**Punctuation**

In bulleted lists:

- Use sentence case and punctuation if each bullet item forms a complete sentence; otherwise, use lower case at the beginning and no punctuation at the end of each item.
- Use a period at the end of the last item in a bulleted list to signal to readers that they’ve reached the end of the list.

Put commas and periods inside the quotation marks, whether or not the punctuation is part of the quotation. This is the traditional North American convention. The British convention is to put the punctuation inside the quotation marks only if it’s part of the quotation. For example:

- Do write “every day or almost every day”..
- Don’t write “every day or almost every day”.

**Subject and Program Names**

Generally use lower case for subject and program names (e.g., *language arts program, science program, mathematics program*), unless the subject is a language (e.g., *English, French*). Exceptions to the lower-case rule include *French Immersion, International Baccalaureate, and Public School Program*. Use initial caps for specific course names, such as *Math 10*. 

Appendix D. Sources & Recommended Resources


<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>accreditation</td>
<td>A program of the Nova Scotia Department of Education (DOE) requiring that all publicly funded schools participate in a process of <strong>continual improvement</strong> in order to meet a standard of excellence. The DOE has agreed to let the Halifax Regional School Board use its own process of Planning for Improvement, with some modifications, to meet the provincial requirements for school accreditation. See “Links to the Nova Scotia School Accreditation Program” in chapter 1. Also see chapter 10, “Obtaining Provincial Accreditation.”</td>
</tr>
<tr>
<td>backward design</td>
<td>A planning process that involves “starting with the end in mind.” It consists of three stages: (1) identifying the desired outcome or results; (2) deciding how to measure progress; and (3) identifying strategies to achieve the desired outcomes. (Wiggins and McTighe, 2007) See “Backward Design” in chapter 2.</td>
</tr>
<tr>
<td>common assessment</td>
<td>Common assessments are classroom assessments that are created and implemented by a team of teachers operating as a professional learning community. (See Chapter 2, Figure 4.)</td>
</tr>
<tr>
<td>continual improvement</td>
<td>The philosophy underlying the Planning for Improvement process at the Halifax Regional School Board. Continual improvement has been described as “a persistent disquiet with the status quo and a constant search for a better way to achieve goals and accomplish the purpose of the organization.” (Dufour, 2006, p. 4) See “Continual Improvement” in chapter 2.</td>
</tr>
<tr>
<td>context indicators</td>
<td>In the school self-assessment framework, information about things that influence learning and teaching, but that aren’t under the direct control of the school. Examples include demographic information about the school community and the surrounding neighbourhood; enrollment trends; and information about the school facilities. See “Types of Evidence” in chapter 2; and see Figure 7 in chapter 4.</td>
</tr>
</tbody>
</table>
| correlates of effective schools | Key characteristics of schools where all students are able to learn and achieve, regardless of the advantages or disadvantages that they experience outside of school. According to research (Lezotte, 1991), these characteristics include, for example:  
  • a clear and focused mission  
  • high expectations for all students to achieve  
  • instructional leadership, both from the principal and from teachers  
  • frequent monitoring of student progress  
  • maximum time spent on learning (student time on task)  
  • a safe and orderly environment  
  • excellent home-school relations.  
  See “A History of PFI in our School Board” in chapter 1. |
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOE</td>
<td>Nova Scotia Department of Education.</td>
</tr>
<tr>
<td>key indicators</td>
<td>Information that helps us to understand where we are in relation to a goal. Key indicators are meaningful and measurable characteristics of the goal. For example, if the goal is improved student achievement, then a key indicator might be the percentage of students who meet the expectations on a board-level literacy or mathematics assessment.</td>
</tr>
<tr>
<td>outcome indicators</td>
<td>In the school self-assessment framework, the levels of student achievement in the school—in other words, how well students are doing in relation to the expected learning outcomes. The information comes from ongoing classroom-based assessments, as well as school-wide, board-wide, provincial and national assessments. See “Types of Evidence” in chapter 2; and see Figure 7 in chapter 4.</td>
</tr>
<tr>
<td>PEBS</td>
<td>Positive Effective Behaviour Supports—a general approach to preventing problem behaviour and creating a positive school climate. It involves teaching and reinforcing mutually respectful behaviour, and responding to inappropriate behaviour.</td>
</tr>
<tr>
<td>PFI implementation portfolio</td>
<td>A concise record of the school’s yearly progress in implementing its PFI plan. It includes, for example: the school self-assessment; the PFI plan; the school’s annual report to the community; the interim report to the Department of Education; a brief annual report from each PLC in the school; PFI survey reports; samples of effective practices, such as common assessments that were tried at the school; and assessment results from school-wide, board-level and provincial assessments. See chapter 9.</td>
</tr>
<tr>
<td>PFI leadership team</td>
<td>A board-level team that provides overall direction and support to schools in implementing the process of Planning for Improvement. See chapter 3.</td>
</tr>
<tr>
<td>PFI plan</td>
<td>The school’s plan for improvement. The school develops its PFI plan after completing the school self-assessment process. The PFI plan is built by answering six questions, and so the plan is sometimes referred to as the six questions. See chapter 5.</td>
</tr>
<tr>
<td>PLC</td>
<td>Professional learning community. “A team whose members work interdependently to achieve common goals linked to the purpose of learning for all.” (Dufour, Dufour, Eaker &amp; Many, 2006, p. 3)</td>
</tr>
<tr>
<td>portfolio</td>
<td>See PFI implementation portfolio.</td>
</tr>
<tr>
<td>process indicators</td>
<td>In the school self-assessment framework, information about the beliefs and practices that influence relationships, the school environment, learning and teaching. The information is typically collected through consultations, focus groups, and surveys, such as the board-wide surveys of students, teachers and parents. It is also collected by teachers through their daily observations in the classroom and through interactions with other teachers in their professional learning communities. See “Types of Evidence” in chapter 2; and see Figure 7 in chapter 4.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>qualitative evidence</td>
<td>Evidence that describes a situation or phenomenon without measuring it. This type of evidence comes from sources such as interviews, focus groups, case studies, and anecdotal observations. See “Types of Evidence” in chapter 2.</td>
</tr>
<tr>
<td>quantitative evidence</td>
<td>Evidence that can be expressed in numbers and statistics. Examples include student assessment results, attendance patterns, survey results and census data. See “Types of Evidence” in chapter 2.</td>
</tr>
<tr>
<td>school improvement plan</td>
<td>See PFI plan.</td>
</tr>
<tr>
<td>school profile</td>
<td>A resource tool that was formerly posted online at myHRSB, and used in the school self-assessment process. It contained general information about the school and the surrounding community, and described several categories of school effectiveness. Note: The online school profile has been replaced by the school self-assessment framework described in chapter 4 of this handbook. The PFI school profile is now called the school self-assessment report, to distinguish it from other types of school profiles, such as the general description posted on the school’s website, or the profile referred to in the School Advisory Council (SAC) letter of agreement.</td>
</tr>
<tr>
<td>school self-assessment</td>
<td>The first step in the Planning for Improvement process at the school level. See chapter 4.</td>
</tr>
<tr>
<td>six questions</td>
<td>The framework for constructing the school’s PFI plan. See chapter 5.</td>
</tr>
<tr>
<td>stanine</td>
<td>(Standard of nine.) A way to show the distribution of test scores, using a nine-point scale. A score of 1–3 is below average; 4–6 is average; and 7–9 is above average.</td>
</tr>
</tbody>
</table>