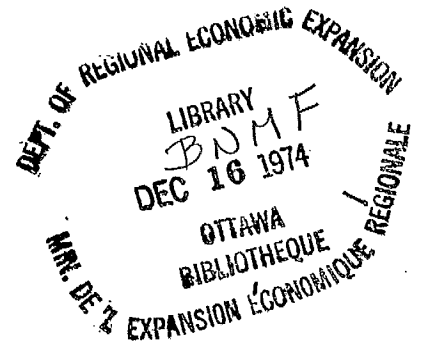


Professional Development Associates

Educational Consultants



REPORT

FOR

DEPARTMENT OF REGIONAL ECONOMIC EXPANSION

A PRELIMINARY SURVEY

OF

THE STATE OF EDUCATIONAL PLANNING

IN THE ATLANTIC PROVINCES

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A Division of Gerald Nason Associates Limited

A REPORT

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DEPARTMENT OF REGIONAL ECONOMIC EXPANSION

A PRELIMINARY SURVEY
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THE STATE OF EDUCATIONAL PLANNING
IN THE ATLANTIC PROVINCES

Professional Development Associates,
Educational Consultants,
2378 Holly Lane, Ottawa, Ontario
June, 1972

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FOREWORD

This is a preliminary study. As such, DREE agreed that this Report should concentrate on what descriptive data could be obtained in a short space of time (eight weeks), and that our assessment of the situation should be based -- tentatively -- on that information. Thus, in the absence of anything more than incidental opportunities to carry out the usual validation procedures, the authenticity of much of the data obtained has had to be accepted at face value for the time being.

Nonetheless, we have considerable confidence in the general outlines of this description of the current state of educational planning in the four Atlantic Provinces. We believe that the present Report will provide DREE with a reasonable overview of the situation in May, 1972, and with a basis for deciding what further study would be useful.

PDA is most grateful to DREE for the opportunity to study this vital matter, and to the many government officials and educators in the four Atlantic Provinces who contributed such a generous fund of information and views in so short a time.

Professional Development Associates

INTRODUCTION

It is true that there is no agreement on the precise definition of educational planning and its parameters thus far, but we consider the following a useful and realistic working definition:

"Educational planning is the exercising of foresight in determining the policy, priorities and costs of an educational system, having due regard for economic and political realities, for the system's potential for growth, and for the needs of the country and of the pupils served by the system."¹

Educational planning, then, like planning in any other field, is a matter of making a reasoned choice from among possible future alternatives taking into account the known relevant facts -- and setting out to achieve the objectives and programs selected. Obviously, it relies to a very great extent on the availability and accuracy of data. For this reason, we have concentrated our attention in this study on two main aspects of educational planning in the Atlantic Provinces: the mechanisms; and the data situation. In the latter case, we have sought information on both descriptive data and projected data.

Part I of this Report explains the background of the study very briefly. Parts II and III present the findings, together with our observations. Part IV draws comparisons among the current educational planning situations in all four provinces, and Part V offers some concluding remarks for DREE's consideration.

¹C.E. Beeby, Planning and the Educational Administrator, International Institute for Educational Planning, UNESCO, Paris, 1967, p. 3.

PART I -- BACKGROUND

Purpose of the Study, and Terms of Reference

The major purpose of this study was to provide DREE with as accurate a description of the present state of educational planning in the four Atlantic Provinces as was possible within the constraints of a brief, preliminary investigation. The study was also intended to enable DREE to judge whether or not more intensive or extensive investigation and analysis would be warranted.

The official terms of reference, as contained in the contract, read as follows:

"2.1 A study based on public information available to the Consultant which will report on the trends of physical development of primary and secondary school buildings which result from planned advances in pedagogical methodology and which will:

2.1.1 for each province:

- (i) examine the mechanism and general character of educational planning;
- (ii) provide a descriptive catalogue of the educational planning elements that exist, together with any available information on the planning structure and relevant roles and responsibilities;
- (iii) examine links between educational planning and total provincial planning.

2.1.2 Make comparative comments on the status of educational planning in the four (4) Provinces.

2.1.3 Provide useful current information on educational planning, and will provide DREE officials with a basis for deciding whether or not a more intensive investigation and analysis would be warranted, in the Atlantic Provinces."

Method

As a first step, data collection instruments ("Data Sheets") were designed and prepared. (Copies have been included in the Appendix to this report.) The first instrument (Part A) was an outline for a structured interview to cover the key factors in educational planning in logical sequence. Parts B and C were check-lists designed to obtain an overview of the adequacy and availability of data, and the current practice with respect to projections useful for educational planning. These instruments were based on common international educational planning practices, with certain adjustments to take account of what was already known of the situation in the Atlantic Provinces.

Appointments for visits to the field were arranged in advance with the Deputy Minister of Education in each province. Interviews were conducted during the period May 8-19, inclusive, with senior officials of each Department of Education. Where time and mutual schedules made it possible, interviews were also conducted at junior levels of the Department of Education and in other government departments, as well as in related sectors such as teachers' organizations and school boards. Those interviewed were provided with a copy of Part A of the Data Sheets to help them follow the line of inquiry, although they were encouraged to stray from this outline as they saw fit. Parts B and C -- the check-lists -- were left for those in the Department to complete.

PART II -- THE STATE OF EDUCATIONAL PLANNING IN EACH PROVINCE

NOVA SCOTIA

1. Over-all Provincial Planning

There is no integrated planning for the total province of Nova Scotia, at present. Senior civil servants state this fact bluntly, and their view is supported by statements made in the Legislature and reported in the public press. The present situation appears to consist of segmented planning of great unevenness in some of the government departments, little or no planning in others, and no effective machinery for co-ordinating or rationalizing what planning is being done. The view was expressed that it is highly unlikely that anyone has any very clear idea of the present and projected rate of investment (i. e. capital formation). Thus, a fair description might be that Nova Scotia provincial planning is informal and ad hoc.

The Department of Education is farther advanced than almost any other department, as shown by the information recorded in the following sections. However, educational planning is bound to be limited without the anchor and frame of reference of a well-defined strategy (economic, social, etc.) for the province as a whole. For example, under present conditions the Department of Education has no information on industrial developments that are planned by Industrial Estates Limited or by the newly-formed Department of Development. Because such developments can have a pronounced effect on educational needs, this is a serious lack.

There is hope of improvement if the new Department of Development can fulfill its role of co-ordinating the over-all provincial planning. However, no one cared to predict the date at which this co-ordination would begin.

2. Educational Planning Within the Department

Only in the last three or four years has there been any true and systematic planning carried out by the Department of Education. As a result, the system is just now showing signs of efficiency and confidence, having pretty well overcome the inevitable problems of orienting staff and adjusting methods to any new process of such complexity.

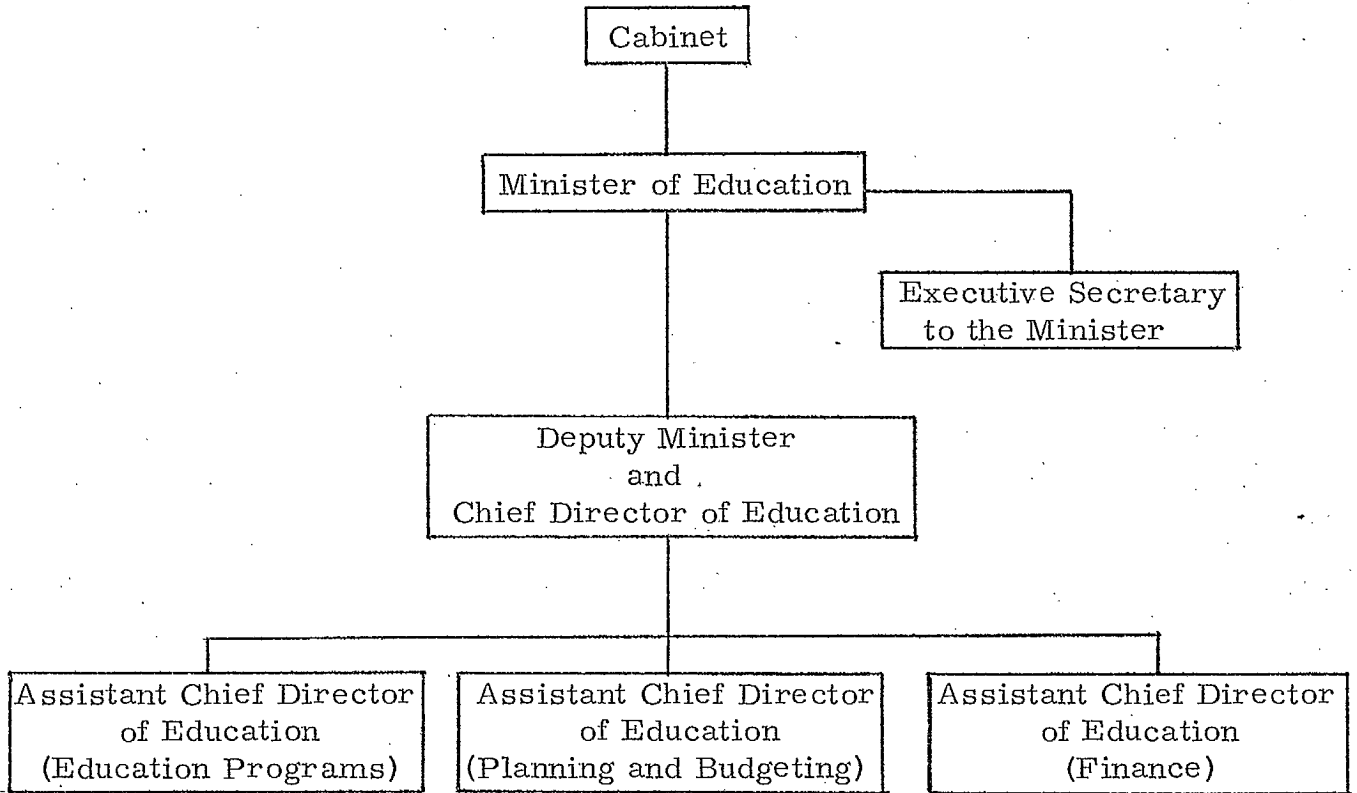
The Department of Education's present approach to planning follows the general lines of a program planning and budgeting system (PPBS). However, the approach is not rigid. The original design, installed in its early phases with the assistance of management consultants, is being consciously adapted on the basis of early experience with it so as to meet educational needs more adequately. The information sub-system, in fact, was never accepted in its original form, but was used as a base for a new design produced internally by the Department -- in consultation with the provincial government's Management Services Division -- to better meet the needs in Nova Scotia. The Department also has plans for early implementation of what has been termed a "Total Educational Program Development System", the design of which was commissioned by the Department to cover off some of the PPBS weaknesses in respect to the educational

program, itself, but to do so in such a way that the two systems would form compatible parts of a new approach to educational planning and management. We were told that the preparatory steps for introduction of this new program-oriented system will be taken no later than September, 1972, and could occur earlier.

The present Department of Education planning term covers three years. This is shorter than usually considered desirable (five years is more common) but, until provincial planning advances and the role of the Treasury Board is rationalized, extension of this term would be useless. Under present conditions, only the current year's plans -- as approved -- can be firm. Although plans are made for the two succeeding years, this is done in full knowledge of an apparent tendency on the part of the Treasury Board to make cuts unpredictably right up to the last minute. Because there does not appear to be any pattern of consultation by the Treasury Board, but rather a pattern of autocratic behaviour, the increasing feeling of educational planners that their work may be for naught is easy to understand. It is also easy to understand their reluctance to extend their planning term beyond the present three years.

Educational plans are reviewed annually, the process beginning as soon as the previous budget estimates have been approved in original or altered form. The senior organizational chart on the next page will be of assistance in following the steps in the planning process. Program reviews are usually conducted in June and proposals go forward through the

SENIOR ORGANIZATIONAL CHART
(Nova Scotia Department of Education)
1971-72



Management Committee (the Deputy Minister and Chief Director of Education, and his three Assistant Chief Directors) to the Minister of Education for consideration and assignment of priorities. The results form the basis for the preparation of the Department's estimates which are submitted to Treasury Board and which, apparently, the Board is free to adjust drastically. When passed by the Legislature the approved budget estimates are examined in the Department to detect any necessary re-alignment of funds and program.

At each stage, delegation of drafting (proposals and estimates, for example) extends well down the organization chart to the level of activity managers, which includes virtually everyone in the Department above the clerical level. Screening and approval of proposals or estimates before being passed on is carried out by the successively-higher ranks of management.

This system is only two or three years old. The Department is still learning how best to use it, and is adapting it in the process. As usual, one of the largest problems has been to get personnel to conduct program reviews that take into account the possibility of a need for deletion or reduction of programs. The tendency still is simply to add to what already exists, but the discipline necessary to truly objective program review seems to be developing.

The draft plan is usually approved internally by all levels of the Department and the Minister by about September 1 -- the delay being

caused by the holiday period. The plan covers the succeeding two years -- subject, of course, to any subsequent vicissitudes of the Treasury Board!

It is reassuring to note that policies and objectives, as well as programs, are reviewed. As recently as 1969, no statement of objectives for the Nova Scotia school system existed, but this situation has now been rectified. Policies and objectives are said to be under continuous rather than routine periodic review, as a natural part of the process of considering proposals that arise out of concentrated program review by the regular weekly meeting of the Department's Management Committee. The attitude of the Deputy Minister and his Department is that sound policy in a modern school system depends on its flexibility and its ability to adjust quickly to meet new situations in the shifting context being served.

It will be clear that present educational planning in the Department is concentrated on the finance-related and business-related aspects of the system, and is weakest in the area of the actual education program. Local boards in Nova Scotia do not bear the province-wide burden of distributing the available money. Therefore, it is hardly surprising to find them very critical of the weaknesses in the Department's planning. They say outright that the Department has not shown any initiative and leadership in planning as a whole. They are right, and yet we can be sympathetic when one considers how far the Department itself had to move (and move the boards) in three or four short years to bring any order even to the

externally-imposed priority sector of education finance. Furthermore, we believe that the soon-to-be-introduced "Total Educational Program Development System" will give local educators the leadership and support they (as teachers) are understandably looking for.

(a) Special Planning Unit

Within the Department, the new system and structure has provided a small, combined unit headed by the Assistant Chief Director of Education, Planning and Budgeting.

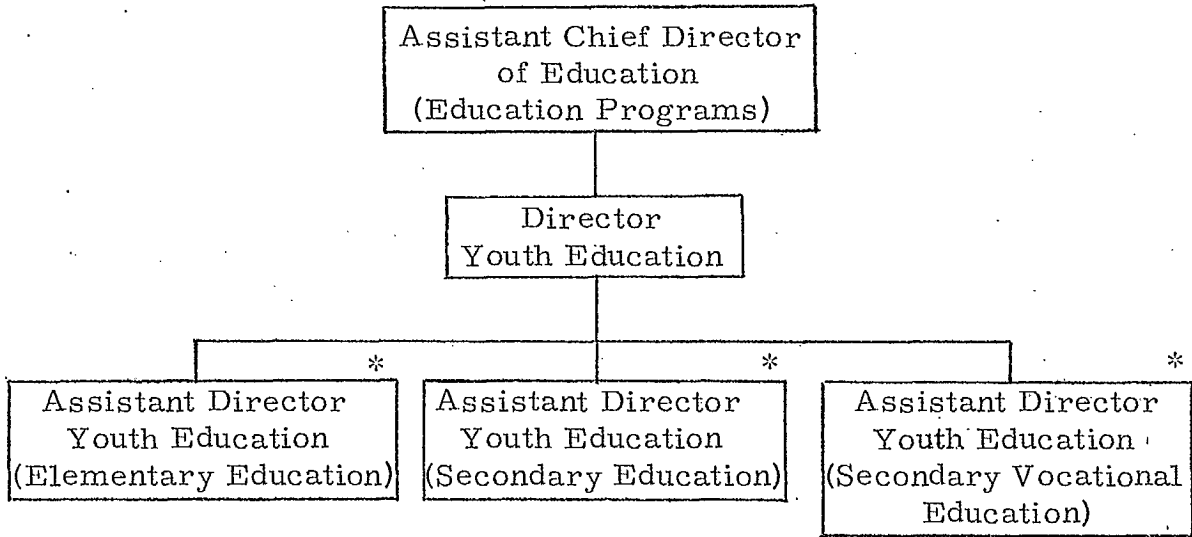
The planning unit, itself, is small. It consists only of the Assistant Chief Director and his Co-ordinator of Planning and Budgeting. The latter title is significant for, under the Nova Scotia system, the planning is actually done by the respective Directors and their staffs throughout the Department -- with the planning unit really being responsible for the co-ordination of this work. The small operations research unit of two junior officers in the same section acts as a kind of support service in connection with planning and statistics, and is often called upon by the other sections of the Department for technical assistance.

(b) Division of Planning Responsibilities

Within the Department, those who carry the primary planning responsibilities (as distinct from the intermediate or ultimate responsibilities) are indicated by asterisks (*) in the structural chart in each section below. Supervisors up to the Assistant Chief Director level (see chart on page 8) are also shown in each case. It is to be assumed that,

in every case, responsibility continues upward successively to the Deputy Minister, the Minister, and the Cabinet.

(i) Elementary and Secondary Academic Programs



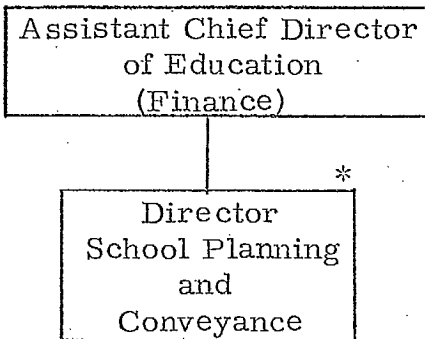
The neatness of the foregoing diagram is somewhat deceiving. For the present purpose it is sufficient to note that, aside from their own personal ingenuity and experience, these Assistant Directors must rely on provincial curriculum committees for ideas and guidance. These committees, as now constituted, are neither broadly representative of current practice in the field nor adequately provided with a system of feedback communications that would enable them to represent the true views and situations of those who actually work in the schools.

It should be noted that the "Secondary Vocational Education" programs referred to in the chart on this page comprise industrial arts and home economics, for the most part. The teaching of more-specialized

technical and vocational studies (auto mechanics, hairdressing, hotel trades, etc.) is conducted separately in the Regional Vocational Schools which come under the Director of Adult Education. (See sub-section (iii) below.)

To date, performance indicators related to the educational program have been almost non-existent. When the new "Total Educational Program Development System" is installed, it should go a long way towards rectifying this situation. In the meantime, the evaluative feedback essential to sound planning is limited to the Standards Project, which consists of standardized achievement testing at grades 3, 6 and 9. Grade 12 provincial examinations appear to be on their way out. In any event, they have only been used in the academic stream, and the Department is just now taking the first steps to develop an evaluation program that will collect data from all students at the senior high school levels. Results are unlikely to be available before the next two or three years.

(ii) Elementary and Secondary Buildings



In terms of present duties, it would be more accurate to call the Director of School Planning and Conveyance the "co-ordinator" of

planning for elementary and secondary school buildings. The situation is complex. With the exception of three new amalgamated boards in the province, statutory responsibility for capital expenditures of all kinds is vested in the local municipal council rather than the school board. School boards are operators only, and may own no property. Procedures outlined for school construction programs in the province call for liaison between the municipal council and the school board every step of the way, but the observance varies markedly from local area to local area. It is still possible to find situations where the board is expected to tell the council only how many students it expects will have to be accommodated in a certain locality, and thereafter must make do with whatever building the council is able and willing to build on the site it (the council) chooses. In other cases, there is open and continuing dialogue on the matter, and the board (with or without consulting its professional educators, in turn, according to the board's own inclination) really determines the "use requirements" portion of the specifications.

There are, of course, certain checks built into the procedure: approval by the provincial departments concerned with health, public works, financing, and fire hazards, for example. These are all channelled through the Director of School Planning and Conveyance who acts as a kind of clearing-house and broker between the councils and the various government authorities. But in carrying out his task, including his responsibility for recommending approval or otherwise by his own Department of Education,

it is alarming to note that this official has no school building standards or even guidelines to use as reference points. He often consults the standards that have been set in other provinces (especially Ontario) for guidance, but there are none for Nova Scotia except the "rules of thumb" developed through trial and error by his Department and others, backed by reference to the more general requirements of the Canada Building Code. In setting the requirements for special rooms (art, music, home economics, industrial arts, etc.) the boards and the School Planning and Conveyance Section have access to the advice of Department of Education subject consultants from the Specialist Services Section of the Youth Education Division.

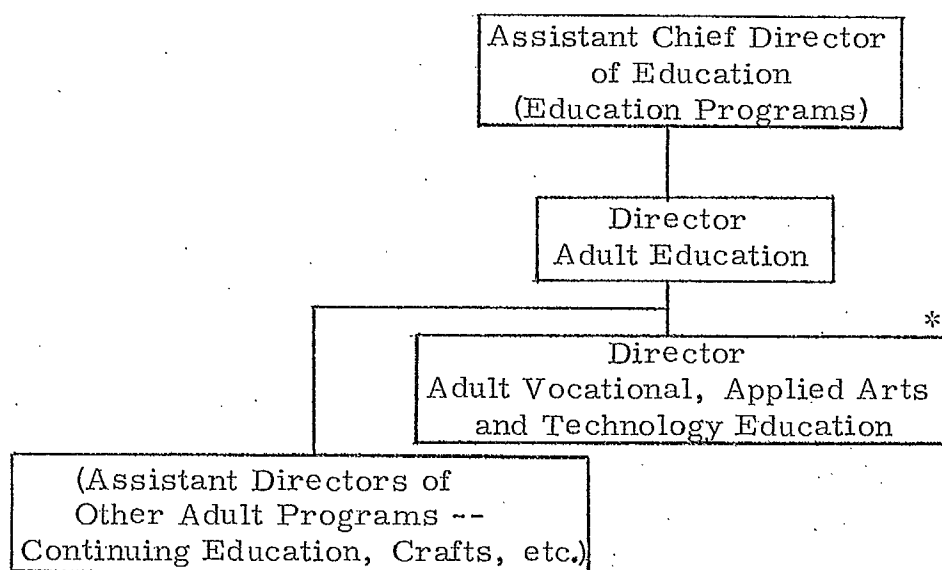
In the absence of guidelines or provincial school building standards, every single proposal for new schools, additions, alterations and other construction to service the educational system must be individually submitted to the Director of School Planning and Conveyance for consideration, consultation with other concerned departments, and recommendation. Every proposal over \$60,000 -- most of them, today -- must then be considered by the Department's Management Committee, and finally submitted with their recommendation to the Minister of Education.

It may justifiably be claimed that there are advantages to the smallness of the province. There are also disadvantages, among them the temptation to cling to outmoded procedures simply because the workload (50 proposals two years ago, 30 last year) still makes it barely

workable because of one or two remarkable individuals. Even if amalgamation begins to move forward again after a two-year delay, and the 60-or-so local school boards are reduced to 15 or 16, improvement in this situation is unlikely unless the procedures are changed.

As for the effect of pedagogical patterns on facilities planning, it will be readily recognized that -- thus far -- there is no way of predicting the future patterns of elementary and secondary academic programs and methods. At present, the variation ranges from the traditional lecture method with its enclosed, formal teaching spaces, to the potential of the Cobequid Education Centre for more advanced, flexible approaches to teaching. In regard to the latter, we understand that inadequate staff orientation is making the advanced facilities more of a frustration than a boon to most of those who work there. Until there is an orderly feedback of information on teaching methods and the subsequent provision of encouragement and resources, prediction of future trends will be impossible.

(iii) Adult Education (Including Training and Retraining) Programs and Buildings



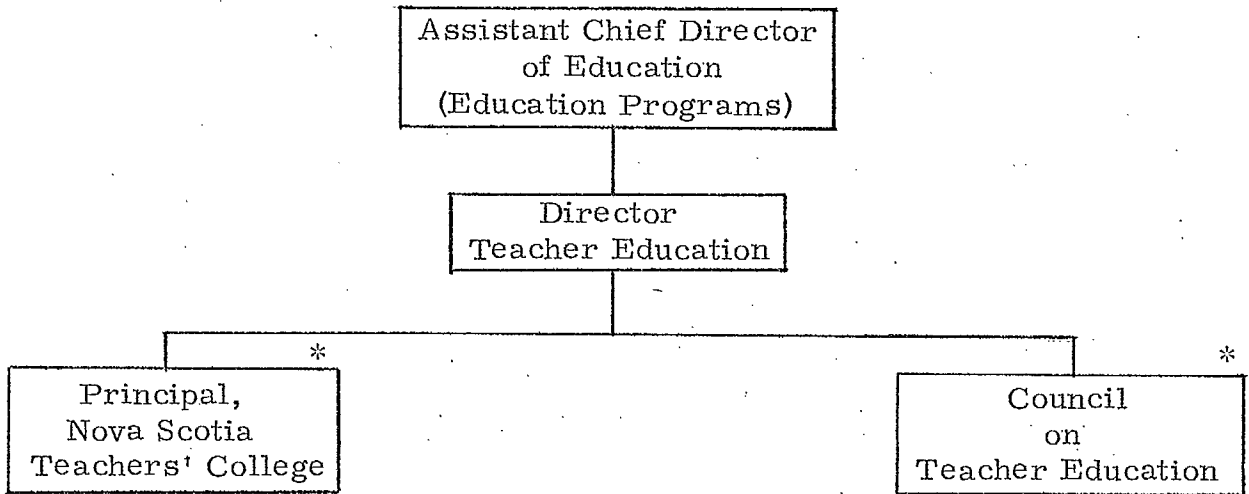
This program encompasses apprenticeship courses and trades and technician-level courses -- as well as the academic and arts and crafts provisions for adults. Courses in the first group (apprenticeship, trades, etc.) are clearly of major interest to this study because of their relative homogeneity, their housing in separate institutions (the Regional Vocational Schools, and the various post-secondary Institutes), and the substantial contribution made to the provision of these buildings and programs from federal funds administered under DREE and Manpower. The precedence accorded these matters by the Nova Scotia Department of Education, itself, is recognized in the fact that this section is headed by a full Director, rather than an Assistant Director.

Buildings for the Adult Vocational, Applied Arts and Technology Education program were funded largely with federal money and have been planned and constructed by the Department of Public Works in consultation with the Department of Education. It remains to be determined how closely these provisions (and their acceptance by the province) were based on authentic data on manpower requirements.

No changes are anticipated in the general design of Regional Vocational School buildings. It is unlikely that more will be built, since the province is already reasonably well-served and many of the present institutions are operating below capacity with enrolments which have actually been decreasing in the last year or so. Furthermore, it must be recognized that the use of out-of-province vocational teacher training

facilities in Moncton limits the possibilities for Nova Scotia to develop new methodological advances that would have an effect on facilities planning. The Moncton teacher training centre is not likely to make such advances on its own, for the approach to industrial training (on which the course is based) is said to be relatively rigid, with a decided disposition to adhere to what has proven workable in preference to breaking new ground.

(iv) Teacher Education Programs and Buildings



This is another complex situation. The lines are quite clear in the case of the Nova Scotia Teachers' College, which is a state institution. However, this is only one of about six teacher education institutions in the province, the others being faculties of education in Nova Scotia universities. As such, the latter are responsible primarily to the governing bodies of their universities.

An attempt has been made to provide some order in a decidedly disorderly picture by setting up a "Council on Teacher Education". This

body, on which all the institutions and the Department are represented, is expected to collate all the policy and program requests and recommendations of these bodies for submission to the Minister of Education. It does not work very well -- partly because of the jumbled lines of responsibility and communication, but also because of the internecine rivalry that has become a hallmark of teacher education in this province. Regardless of the degree of independence enjoyed by each institution, of course, their graduates must meet the teacher certification requirements in order to teach, and this fact gives the Department considerable influence on programs.

Technical and vocational teachers for Nova Scotia are trained at the New Brunswick Technical Institute in Moncton through an agreement with that province. Nova Scotia is consulted, but has little real impact on the planning of the course. Senior educational planners in Nova Scotia feel that this arrangement is one of the weakest parts of their system -- not because it is an interprovincial arrangement (over the years, Nova Scotia has led the other provinces in advocating this kind of co-operation) -- but because they feel that the course lacks depth and provides no solid professional preparation to go with the techniques taught.

Just to sum up the teacher education building situation: the buildings of the Nova Scotia Teachers' College belong to the government and are planned by Public Works in consultation with the Principal and the Department; those of the faculties of education belong to the universities and are

planned by their sovereign bodies, with the Department left very much on the sidelines.

(v) Other

The universities and the Nova Scotia Technical College are independent institutions. Their program and facilities planning is the responsibility of their sovereign governing bodies and is not, unfortunately, co-ordinated in any effective way with the planning of the official public education system.

3. Other Bodies Involved

Other departments of the provincial government enter the educational planning process in Nova Scotia directly or indirectly, and in a variety of ways. The Treasury Board's role is obvious. The parts played by the Department of Public Health, the Department of Public Works, the Department of Municipal Affairs, the Provincial Fire Marshall (and, where transportation seems likely to be a consideration, the Department of Highways) in relation to construction of educational buildings has already been mentioned. Over and above these roles, the Department of Public Health has an on-going interest in health-related programs in the schools, and the Department of Labour shares with the Department of Education the responsibilities associated with the provision of apprenticeship training in the Regional Vocational Schools.

It is said that in the course of educational planning there is consultation "as appropriate" with the school boards, the Nova Scotia Teachers'

Union, and the curriculum committees already mentioned under sub-section (a) in the above section: "Division of Planning Responsibilities". Very hurried interviews with one or two contacts in the NSTU and school board sectors indicate that consultation is minimal and ineffective. The chief vehicles for such involvement are two committees whose concern is almost exclusively with finances: the Foundation Program Committee; and the Education Assistance Committee.

The Foundation Program Committee is likely to be phased out soon because of recent changes in the grant system. It has two representatives named by each of the following: the municipalities; the Nova Scotia School Boards Association; the Nova Scotia Teachers' Union; and the Department of Education. It is chaired by the Deputy Minister and has two major functions:

1. To examine the services being provided under the Foundation (Grant) Program, and to recommend any changes that seem to be called for.
2. To recommend changes in the provincial financial support provided to local boards under the Foundation Program.

The Foundation Program Committee's concern is with the over-all picture, not with individual board situations. It has no concern with the way in which the costs are to be shared between the local and provincial governments, but only with the scales of the services (maintenance, teachers' salaries, conveyance, buildings, etc.) to be shared. It is concerned with the level of total support to be provided jointly by the province and the

municipality under this shared program (as distinct from local supplements, which are now under very tight control by the province. Unfortunately, the representatives have tended to participate in the vested interests of their respective bodies, rather than as a consortium working on a common task. The NSTU representatives, for example, tend to concentrate their attention on getting the best possible deal for teachers when Foundation Salary Scales are discussed, and to take little interest in the other matters that come before the Committee.

The members of the Education Assistance Committee are appointed by the Minister from the office of the Department's Director of Inspection Services, the Department of Municipal Affairs (which handles municipal grants), and the municipalities in the province (usually two municipal clerks). The Department's Director of School Grants and the Assistant Chief Director of Education (Planning and Budgeting) sit with the Committee as advisors. The Chairman is the Deputy Minister. The Committee is concerned with both the recurrent and capital budgets of each individual school board. Its tasks are:

1. To examine the annual estimated budget of each school board, which is to be structured so as to distinguish between:
 - (a) continuing commitments, including natural growth, under current programs; and
 - (b) extensions related to new programs.
2. To recommend to the Minister an approved total shareable cost for the following year.

The Education Assistance Committee may not recommend an amount that will not meet continuing commitments, so reductions obviously relate to extensions. Any board whose budget estimates are so-reduced has a right to apply for a hearing before the Committee, should it wish one. The Committee's task of review is obviously onerous and can become downright impossible in a year when the government, without notice, slashes budgets in mid-term as it did a year ago. However, because of the personnel on the Committee, it would appear to play an important role in planning finances at least, by ensuring that the Department's officials most closely concerned with such matters have a global (almost encyclopedic!) knowledge of the financial situation of every board in the province. In the future, the hoped-for move from 60-odd local school boards to 15 or 16 amalgamated boards could make the Committee's assigned task more feasible.

It will be clear from the foregoing that, in any real or broad terms, these two committees do not provide for effective consultation or involvement of concerned bodies outside the Department of Education in educational planning, whatever their other virtues may be.

4. Local Planning -- And Links With the Department

Those links that do exist between local school board planning and the Department are almost entirely due to the fact that, under the present system, the boards' estimated budgets and very summary accounts of their related plans must be submitted to the Educational Assistance

Committee every year. We would be happier if program planning were more complete and came first, but money is a convenient basis of calculation and monitoring and this, together with the increasingly-evident constraints of the economy, tend to focus attention on it before program. Unfortunately, because of the current heavy workload of the Educational Assistance Committee, reactions of the Minister on the basis of Committee recommendations often do not reach local boards before the date when they must finalize their budget. This situation must be resolved and, because the Department is well aware of it, there is hope -- provided that amalgamation (and the resultant decrease in the number of board budgets to review) moves ahead reasonably soon.

School boards throughout the province are making some efforts to work their way towards implementation of PPBS at their level -- but their progress has been slight. Increasing pressure from the Department through its requirement to complete forms necessary to provincial-level operation on a PPBS basis are forcing more and more of the boards into the pattern but, at the present time, the state of planning at the local level is extremely varied according to the nature and composition -- and habits -- of each board. Furthermore, with rare exceptions, although the boards in Nova Scotia have an increasingly good grasp of their financial position and prospects, they have little or no internal evaluation of their educational program such as would enable them to plan soundly in what should be a primary area of concern.

A very few boards, such as the Halifax City Board of School Commissioners, have five-year building programs which are reviewed and up-dated annually. These boards keep in close touch with city planning and development departments and there is good co-operation. However, even in these situations, building programs concentrate on new construction and tend to give little attention to planning maintenance, renovations, and life-span of existing schools. And most of the local boards are not even this far advanced in planning! It is therefore not surprising that building-planning staff is rare or non-existent at the local board level. Even Halifax has no qualified director of facility planning, although the board is now giving consideration to such an appointment.

Department officials admit readily that, at this stage at least, not everyone in the school system has a clear understanding of the planning mechanism, or even of the plans that have been approved and are now in effect. This is due to the poor communications which we became so well aware of in the course of our work over the past two years in Nova Scotia, and which the Department now also recognizes. If the "Total Educational Program Development System" is installed this problem, too, should be largely removed.

NEWFOUNDLAND

1. Over-all Provincial Planning

There is, as yet, no integrated planning for the total province of Newfoundland. The Minister of Education and senior civil servants agree on this point.

This is a particularly bad time to survey educational planning in Newfoundland. The art and craft of planning is in its early, timorous stages of development throughout Canada. In provinces where even a willingness to plan is just beginning, as in Newfoundland, a recent political embroilment and a protracted change in government inevitably raise questions about all aspects of stewardship under the previous regime, and planning (or lack of it) is a natural target. However, in its election platform, the new government in Newfoundland stressed a need for planning, and it has been consistent in affirming this need during the recent visit to Ottawa by the Premier and several members of his Cabinet. Thus, the new government may fairly be said to be committed to at least the general concept.

The new Minister of Education, the Honourable John Carter, declared that not only was there no over-all provincial planning in the years preceding the Liberal demise; there was "anti-planning"! Since this view was substantiated independently by civil servants at a variety of levels, it may perhaps be given some credence. Certainly, there appears to exist no integrated, high-level provincial planning strategy. Hopes were

expressed that the new Department of Economic Planning (which shares a Minister with the Department of Finance) will improve the situation, but it is too early to make any predictions.

2. Educational Planning Within the Department

There is no systematic, over-all planning by the Department of Education -- outside of the early and so-far sporadic attempts made by the fledgling Educational Planning Unit which will be described later. No formal system is being followed, although certain procedures have developed over the years in respect to isolated features such as buildings, instructional programs, etc. Senior staff of the Department claim that although planning is informal it is not as rudderless as it might at first seem, since there are certain provisions for frequent and regular review. Nonetheless, it remains true that even additions to Department staff are often handled on an ad hoc, piecemeal basis in mid-budget term.

Before condemning the present situation in total, however, one would do well to take the setting into account. First of all, the Department of Education has been operating in a provincial situation where a good many educational changes have been announced without notice by political levels of the government, and have first been heard of by the Department as faits accomplis. Such conditions (and vestiges of them have apparently carried over to the new administration) do not encourage sustained planning beyond the next issue of the daily newspaper. Secondly, one must take full account of the complexities of the distinctive, rugged cultural characteristics of

Newfoundlanders generally. They are not a people schooled or conditioned by their past to have a natural desire for system as a good thing in itself. Even top Department officials could probably be justifiably accused of "anti-intellectualism". And yet they are nothing if not a people of great common sense -- and educational planning relies very heavily on well-ordered common sense. Therefore, in assessing the state of Newfoundland's educational planning, one needs to distinguish carefully between the form (which is almost entirely missing) and the substance (elements of which are gratifyingly present under some name or procedure not always immediately recognizable to outsiders). While it would be premature to do so, we are almost tempted to predict that sound, and even integrated, educational planning may evolve in Newfoundland over the next five years -- but that it will not necessarily follow the lines prescribed by textbooks on the subject or systems "patented" elsewhere. Whatever happens, one thing is clear -- the Newfoundlanders will chart their own course, and they are conditioned to recognize drift quickly and to rectify it.

The new Minister's personal views on educational planning may be summarized as follows. Unless steps preparatory to sound planning (e. g. clearing the jurisdiction so as to permit direct influence on a wide range of forms of implementation) are first undertaken, scientific planning is an idle and academic exercise. Even after preparatory steps are taken, he feels that planning must proceed along broad lines with great leeway for flexibility to take advantage of emerging opportunities and to

meet emerging needs previously unforeseen. Plans should be made for perhaps five years (no more), but only the year's plans actually being implemented at any given time should be considered firm -- the plans for further years being considered tentative and subject to adjustment until they are implemented.

The above, we feel, is an accurate reflection of the Minister's views as he expressed them to us.¹ At first look, the statement may seem reactionary and even opposed to long-term planning. And yet an objective assessment leaves one with the impression that what he states is not only sensible but also (perhaps not surprisingly) in line with some of the procedures actually followed under even-so-formal a system as PPBS. Of course, the Department of Education in Newfoundland still has a long way to go to realize the Minister's ambitions. First of all, as he says, a fair amount of very difficult underbrush must be cleared out of the way through adjustment of legislation and regulations to give the planning agencies at all levels reasonable control over the implementation of what they are planning. Only thus can they be held accountable for the plans they make.

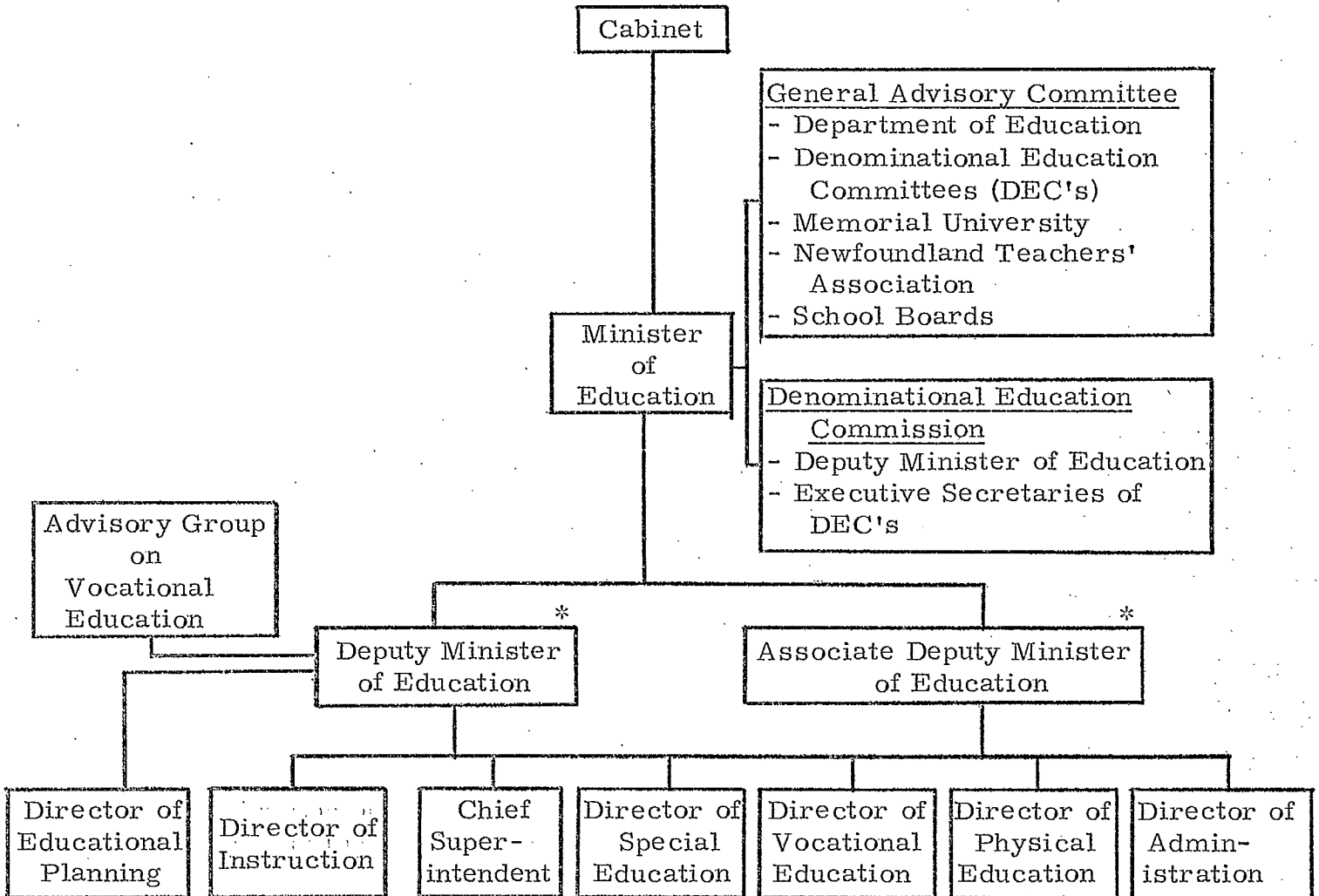
¹While we do not have extensive information on the facts of the situation certain of the Minister's comments about DREE programs and planning procedures lead us to suspect that he has been misinformed. Any who misled him no doubt did so unintentionally, but his remarks were so much more definite than the usual provincial carping about the federal government that we would suggest that DREE take early steps to provide accurate information and to discuss it with him. As a new Minister, the views he is now forming can become fixed, and can affect policies and programs in the future.

It is the Minister's ambition to move as quickly as possible to a four-year planning term within the Department -- after the preparatory steps have been taken. At present, much of the planning appears to be on a day-to-day or week-to-week basis. And yet, there is both regularity and structure in the prescribed procedures for preparation of budget estimates and related program justification each year. Moreover, the claim that was made of "continuous scrutiny by the staff" takes on substance in the fact of a weekly meeting of Directors of Divisions with the Deputy Minister to review and discuss problems, needs, and program. (In other provinces, such a meeting is sometimes given formal status by calling it a "Management Committee" but the function is the same.)

For general reference, the senior levels of the Department's organization are charted on the following page. Although the full organizational chart is unlikely to gladden the hearts of management consultants, it is considered locally to be a great advance over the structure it replaced in 1969.

In preparing his annual estimates (in other provinces, this is labelled "program review") each Director consults the staff in his Division, beginning in October of each year. Estimates, with full justification in terms of related program, are submitted in January to the Director of Administration who co-ordinates budgeting. They move from him to the Deputy Minister, Minister, Treasury Board, and the Legislature in succession. Judgement is passed, questions raised, and (where needed)

SENIOR ORGANIZATIONAL CHART
(Newfoundland Department of Education)
(1971-72)



* Note: Although the Deputy Minister assigns some of his responsibilities and authority to the Associate Deputy Minister on a continuing basis, they work very much as alternates on a day-to-day basis. Thus, officials assigned to report to one will often contact the other when his designated superior is not available. All of this is done very informally.

adjustments are made at each step of the way. We were interested to hear civil servants declare that consultation with the initiating Division is carried on throughout this process whenever necessary. We were also impressed by the statement that, in the course of its scrutiny, Treasury Board often seeks explanations from the Department and that -- when cuts are required -- Treasury Board stipulates the total amount of the desired cuts but leaves to the Department any decisions about what estimates and programs should be adjusted. Approval may come by the end of March, but could be as late as June. Once passed, the respective Directors implement approved programs. In so doing, they must adhere to the detailed budget allocations, and have little or no leeway to deviate from them. As mentioned earlier, however, it is not uncommon for new budget items (including new staff positions) to be proposed by staff, approved by the Minister, and submitted to Treasury Board for consideration in mid-budget term.

Planning of educational programs or curricula is carried on throughout the year without schedules being set, but always with an eye on the deadlines of the budgeting procedure. Most educational program proposals originate in the provincial curriculum committees and/or in the appropriate Division of the Department. All such proposals are considered by the weekly meeting of Directors of Divisions. Minor or routine matters (including, apparently, authorization of a new textbook) are tentatively decided by this meeting and then referred to the Minister for approval, to

the Treasury Board for authorization, and -- assuming it clears these hurdles -- to the Chief Superintendent for implementation in the schools. Major proposals, including any policy matters, must go from the weekly staff meeting to the General Advisory Committee (see chart, page 31) and must pass the scrutiny of that body before being recommended to the Minister, submitted to Treasury Board, etc. This extra test is necessary because of the substantial control by the churches (who are represented on the General Advisory Committee) of every aspect of Newfoundland elementary and secondary education. The General Advisory Committee meets regularly once a month, and its deliberations constitute another on-going review of needs and plans.

Thus considerable attention is given in one way and another to periodic review and continuous planning of many of the program areas for which the Department is responsible. It is true that this is not usually done under any very formalized structure and that, as a result, there is a lack of integration of the resultant plans.

Perhaps the most-ignored dimension of planning, however, is that related to educational objectives and policies. There is a booklet: "Aims of Public Education for Newfoundland and Labrador", which was authorized in 1959 by the then-Minister of Education. The contents are philosophical in nature and seem to have been carefully thought out. However, the statements are very general and have apparently not been reviewed or revised since they were first published, although there is talk of a

committee looking at them "sometime soon". The framing of specific program objectives and the setting of time-frames for their achievement are tasks that have not yet been attempted.

(a) Special Planning Unit

As of about 18 months before our visit, there has been an educational planning unit (sometimes called a "Division") in the Department of Education. This unit has the following staff:

The Director (sometimes termed a "Consultant") (M. Ed. in Educational Planning)

An Economist (B. Comm.)

A Planning Technician (to prepare charts, calculations, etc.)

Two clerical personnel.

The facts about this unit, its functions and its relationships, are somewhat blurred. The Director is on a year-to-year contract, and his terms of reference are so tangled and obscure that they are almost impossible to unravel. As of now, he is said to be responsible for what is called "educational planning", which is interpreted as excluding buildings and other facilities. Even in educational planning, he and his unit have a staff rather than a line relationship to other Divisions. (See chart, p. 31.) Thus, any statement about their responsibilities, other than that they are to hold themselves "on call" for support to the operational line Divisions, seems unjustified.

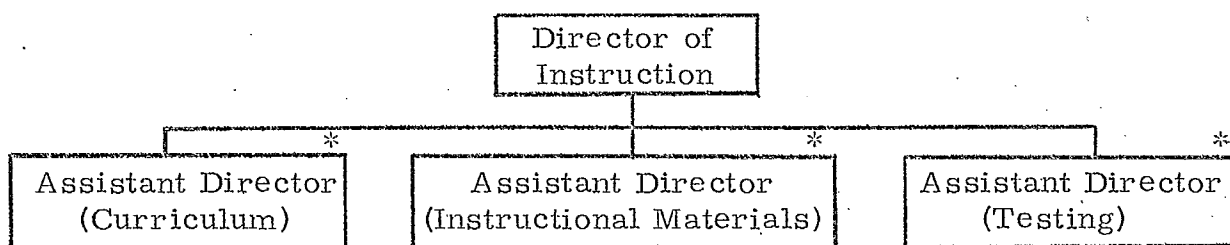
On even short examination, the educational planning unit itself seems impressive in its calibre and potential. Work done in the form of

reports written appears to be of quite high quality. But these reports seem to have been largely ignored by those for whom they were prepared. The "Director of Educational Planning" is barred from the weekly Directors' meetings, and from certain other meetings where his presence would seem to be warranted. His efforts to serve his Department by serving DREE, for example, appear to have further alienated other Department officials.

(b) Division of Planning Responsibilities

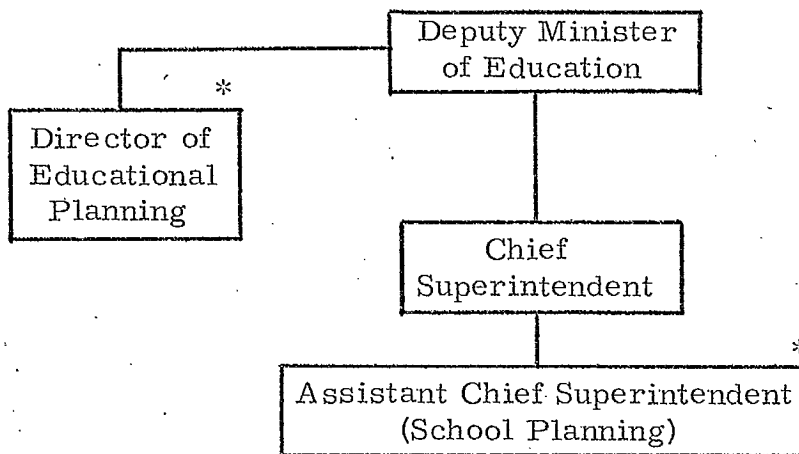
Generally speaking, primary planning responsibilities within the Department follow the pattern of operational program responsibilities. To whatever extent the Director of Educational Planning and his staff may be accepted as being a general support unit for all other Divisions, they may be viewed as a resource group, but this in no way affects the fact that the primary planning responsibility lies within the Divisions. Those in the Divisions who carry the initial responsibility (as distinct from the ultimate responsibility) are shown by asterisks (*) in the following subsections. Superiors up to the Director level are also shown in each case. It is worth adding that planning responsibilities at every level are carried out in consultation with the Denominational Education Committees whenever the broad educational interests of the churches are likely to be affected.

(i) Elementary and Secondary Programs



The segmentation of responsibilities shown above is of interest, particularly the separation of "testing" (or evaluation) from "curriculum". No elementary-secondary division is made, presumably because both levels are administered by each local board in Newfoundland. Implicit in the failure to distinguish between academic levels may be an assumption of, or belief in, a generality of characteristics of students and learning patterns at all levels. This lack of differentiation between academic levels (and age groups) continues through the nature of the assignments given the ten subject consultants and four supervisors attached to one or other of the Assistant Directors in this Division. We were told that the various consultants are in close touch with the field and that they work closely with provincial curriculum committees, most of whose members are teachers.

The programs referred to above are academic for, until now, these have been the only ones offered at the elementary and secondary levels. However, secondary-level vocational programs are now being planned. This planning is in its very earliest stages and is being carried out jointly by the Director of Instruction and the Director of Vocational Education. Should this planning bear fruit, one might assume that each of the three Assistant Directors in the diagram on page 35 will have yet-another dimension added to his responsibilities. It is also interesting to speculate about the problems likely to be encountered in offering vocational programs in school buildings constructed prior to the introduction of those programs. Chaos could be created in the complex network for proposal and approval of building programs at this level -- outlined in the following sub-section.

(ii) Elementary and Secondary Buildings

This apparently-simple line of planning authority covers what has to be one of the most complex situations in Canada.

All school boards in Newfoundland are "unified" in the sense of administering both elementary and secondary schools. However, the boards are denominational, several often co-existing in one school district, and represent the following churches:

1. Roman Catholic;
2. Protestant Integrated (United Church, Anglican, Salvation Army);
3. Pentecostals;
4. Seventh-Day Adventist (a small number).

The Denominational Education Committees of these four groups are jointly granted about \$8,000,000 a year for capital expenditures. School property is vested in the local boards, and so almost directly in the churches.

Proposals for new school buildings, extensions, etc. at the elementary and secondary level originate in the local (denominational) school board.

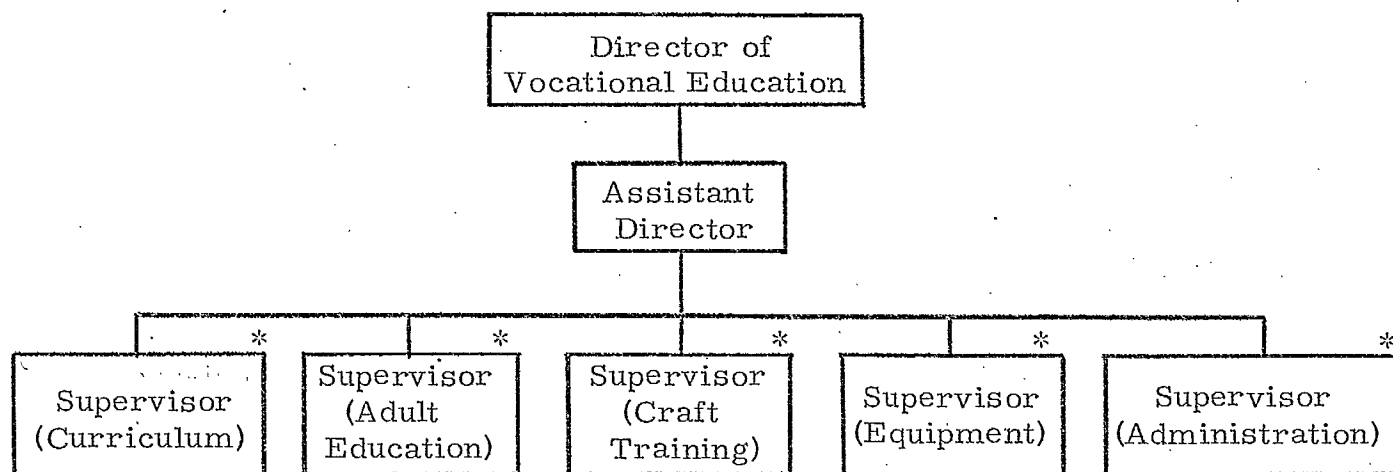
These proposals, including educational specifications and rationale, are sent to the Denominational Education Committee of the board's church group. The DEC consults its own advisory body of interested and representative laymen and considers the desirability of the proposal, then the question of whether or not funds are available. Staff of the DEC are often sent to the area to investigate and report independently.

If the proposal passes the DEC, preliminary drawings are obtained from an architect by the local board and sent to the DEC for consideration. Assuming approval, the entire package is sent to the Department of Education for consideration. The Assistant Chief Superintendent (School Planning) examines the proposal in his own right, obtains the reactions of the Department of Health and the Department of Public Works (site, construction, etc.) and frames his recommendation to the Minister. The Director of Educational Planning considers the "use criteria" (or educational specifications) in consultation with an ad hoc committee of Directors of concerned Divisions, and prepares his recommendation to the Minister. The Minister considers the recommendations and has the right of disapproval. If he does not exercise this right (in the course of the process, the whole package may be sent back to the DEC, the architect, and the local board for revision) the DEC is authorized to enter into consultation with the architect. The local board then lets the contract, for which the DEC guarantees payment within the terms approved.

When one recognizes that the DEC offices are provided out of provincial tax funds, the procedure described above can only be termed wasteful, although, in the present climate, it may be difficult to change. In Newfoundland, there are no school building standards or guidelines to guide the many successive agencies and levels that must consider proposals. New procedures have just been proposed, but this is very different from having standards.

As for the effects on future building design of predicted trends in program and methods, it will be appreciated from the foregoing that prediction of those trends is impossible in Newfoundland. However, the influence of agencies like DREE can be important here. Although there is comparatively little stimulation within the province, Newfoundland teachers have access to professional literature. This, combined with DREE's provision of buildings which make possible the introduction of reasonably well-accepted new methods such as team teaching, can move methods ahead. (DREE is said to have provided the first open-concept school in Newfoundland.) Ideally, the direction should be reversed, with recognition of the need preceding provision and, if there were an effective in-province planning agency, this would no doubt be the case. However, until program planning is more sophisticated, a great influence by DREE and other outsiders fills an important gap.

(iii) Adult Education (Including Training and Retraining)
Programs and Buildings



This Division is a kind of "mini-department" within the Department, and we understand that the status and pay of the Director are higher, accordingly. The Division of Vocational Education, which serves those who have left or graduated from courses in the secondary schools, has so far had almost a monopoly on vocational training. The only exceptions are the independent colleges of trades and technology, fisheries, etc., which do not come under the jurisdiction of the Department.

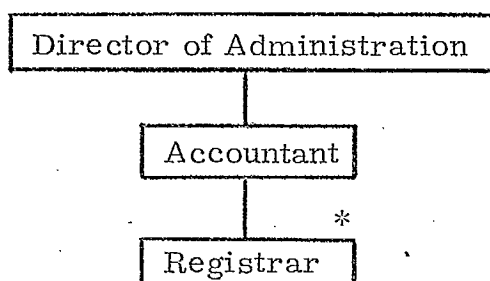
Programs under this Division have been conducted in the provincial vocational schools and upgrading centres. The principals of these institutions have a large say in their own programs, provided that they remain within the requirements established from time to time by the Department. The Department of Labour naturally has a very important influence on programs because of its concern for manpower training.

All vocational training policy comes under the immediate jurisdiction of the Deputy Minister. He reports to the Minister, who has the

the benefit of advice from a vocational training advisory body with representation from a variety of sectors, including business, industry, and labour. Because vocational training is not considered to be of special denominational interest, its affairs do not usually come before the General Advisory Committee. Moreover, vocational training building proposals by-pass all planning sections of the Department outside this Division. Money for such buildings is provided directly by the Legislature, often using substantial federal grants or loans. Planning of such buildings is conducted by the Vocational Education Division in close consultation with the Department of Public Works and the Department of Health.

Due to constraints of time, we had no opportunity to assess trends in vocational training methods and program, and their affect on buildings. However, we doubt that major shifts are anticipated.

(iv) Teacher Education Programs and Buildings



In this province, no Division of the Department has responsibility for teacher education, but the Registrar is responsible for certification. In view of the organization chart's placement of the Registrar, it might be assumed that his job is routine and clerical in nature and importance. In fact, this is not so.

All training of elementary and secondary academic teachers is done in the Faculty of Education at Memorial University, which directly plans the program. However, under the Education (Teacher Training) Act of 1969, the DEC's and the Registrar serve on a Teacher Certification Committee which sets up boards to examine teacher training graduates. The applications of candidates who pass these boards are referred to the Registrar, who has the final right of approval in behalf of the Minister. This important judgemental function of the Registrar gives him a great potential effect on the pattern of teacher education in the province. We had no chance to determine how widely he uses these powers.

Vocational teacher training is not yet offered in Newfoundland. Most of the province's vocational teachers are trained at the New Brunswick Technical Institute, and the remainder are immigrants to Newfoundland. Consultation and liaison with the New Brunswick institution is the responsibility of the Director of Vocational Training.

(v) Other

Memorial University, the College of Trades and Technology, and the College of Fisheries, Navigation and Electronics are independent of the Department. They report to their own boards, and their planning of program and buildings is not co-ordinated in any effective way with the work of the Department of Education.

3. Other Bodies Involved

A general idea of the involvement of other agencies and government departments in educational planning and affairs generally may be obtained

from the foregoing sections of this account of the situation in Newfoundland. It may be useful to add that the role of the Department of Community and Social Affairs in educational planning appears to have diminished considerably over the last year or so. An important role envisaged for this Department when it was set up was to deal with DREE and other federal agencies on behalf of all provincial government departments, but there are signs of increasing direct involvement of the Department of Education and its various Divisions in DREE negotiations and in programs which are funded as a result.

4. Local Planning -- And Links With the Department

Any attempt at establishing direct links between the local denominational boards and the Department of Education must take full account of the existence and rights of the Denominational Education Committees. However, much of the DEC involvement is channelled through the General Advisory Committee and thus there is no infringement on church rights in the fact that local curricula are subject to approval by the Assistant Director of Curriculum in the Director of Instruction's Division, who in turn is bound by the provincial curriculum. The curriculum laid down by the Department is said to leave considerable scope for local initiative, if boards wish to use it.

There is little systematic planning at the local level, and very little uniformity either in procedures or quality of planning. In the end, characteristics of local planning seem to be determined almost entirely by the

competence and initiative of the local superintendent, and the adequacy of the financial resources available. In most boards, teachers are involved to at least some extent in local planning, but the effectiveness of this involvement varies from district to district and from board to board. Even in St. John's, for instance, there are said to be considerable differences in the planning approaches and the calibre of planning exhibited by the various denominational boards that operate schools there.

There can be no real links between over-all local educational planning and over-all provincial educational planning in Newfoundland, for neither really exists. However, what procedures there are can be said to be reasonably well understood at the local level. The Chief Superintendent maintains close contact with the local superintendents, whose appointment by the respective DEC's must be authorized by the Minister. Maintaining this channel of communication, indeed, is the main responsibility assigned to the Chief Superintendent. Besides visits to the field by himself and his staff and the distribution of printed information, he convenes frequent meetings of all local superintendents to consult them and to inform them about matters of common concern. This year, for example, there have been four such meetings.

PRINCE EDWARD ISLAND

1. Over-all Provincial Planning

With massive federal government stimulation and assistance, a large measure of integrated planning for the development of the total province has emerged in Prince Edward Island under the "PEI Development Plan". The federally-funded program is locally administered by the Department of Development which is just now making the conversion to become the "Office of Planning". This new Office is intended to serve the Planning Board which, like the Treasury Board, is to be made up of members of the Executive Council, the "cabinet" of the PEI government.

Despite this integrated approach in the province, senior officers of the Office of Planning were reluctant to describe it as a total systems approach, since there are as yet no comprehensive goals. They felt that it could more accurately be described as a "co-ordinated series of related but separate programs". The planning term for the PEI Development Plan covers 15 years and is broken into two stages, the first of which is to take "no longer than six years" (deadline: 1976). Details of the Plan are renegotiated between the provincial and federal governments every two years.

The Office of Planning concentrates its attention on planning related to the Development Plan, but also aspires and attempts to co-ordinate other aspects of provincial government planning -- whether within or outside the Plan. Most government programs are substantially related to the

Plan, in any event, with the exception of the Health and Welfare program and certain aspects of Fisheries.

2. Links Between Educational Planning and Total Provincial Planning

Education accounts for approximately 25% of the cost of the PEI Development Plan. In theory, at least, planning within the Department of Education is totally integrated with provincial planning generally, and a quick survey of provisions bears this out in large measure.

The chief links are three in number and are heavily concentrated at the Deputy Minister level:

1. The government has a Human Resources Committee whose members are the Deputy Ministers and senior officials from all departments whose jurisdiction is related to the development of human resources, including the Department of Education. This Committee meets once a month to consider all matters of common interest related to current programs, proposals and plans. It has no authority to comment officially on the substance of programs of individual Departments, but only to make recommendations to the Executive Council in regard to the co-ordination of those programs.
2. As program proposals and related budget estimates are prepared by the departments (including the Department of Education), the program proposals themselves are to be submitted to the Office of Planning and the Planning Board it serves (when these are fully operative) for review in terms of the Development Plan, just as

the related financial estimates are submitted at the same time to the Treasury Board. Reviews by the Planning Board are to be in terms of policy, with a particular eye to the inter-departmental implications.

3. An ad hoc Co-ordinating Committee on Taxation Changes for Education was formed. It has apparently just completed its work and is being phased-out. This Committee, whose work was to co-ordinate the adjustments required in the change-over to the new system (e. g. creation of regional boards and the "foundation program" of financing) has had the Deputy Ministers of all concerned departments as members. (This, of course, included the Deputy Minister of Education.) The Committee set up several inter-departmental working groups which concentrated on specific matters, such as educational facilities, budget procedures for the new regional boards, etc. As these working groups encountered problems requiring policy decisions, assumptions, etc., the Office of Planning (the old Department of Development) provided the necessary answers. The working groups' recommendations were first screened and consolidated into co-ordinated recommendations by the parent Co-ordinating Committee on Taxation Changes for Education, which were then submitted in turn to the Office of Planning for further consideration and adjustment before being submitted to the Executive Council through the Planning Board.

Thus, it appears that links between planning by the Department of Education and the total provincial planning mechanism are well-established, and operate both frequently and regularly.

If we are left with an area of concern in this regard, it is two-fold, and concerns:

- (a) The apparent present preoccupation of the Office of Planning with accomplishment, but not with effectiveness;
- (b) Some indication that the Office of Planning makes arbitrary decisions on the basis of its review of proposals, etc., without effective consultation with the Department of Education.

The second of the foregoing points will be clear without further elaboration. The first warrants some clarification.

It must be admitted that performance indicators from the education sector are sparse, to date, and this is said to be equally true of most other departments, as well. The PPBS system is in its early stages and has to date been only partially implemented in all sectors. The Office of Planning (out of a certain degree of frustration and exasperation, one senses) is considering ordering all concerned to begin conducting formal program reviews and proposing alternatives with complete cost estimates. Despite the admitted difficulties with which they are faced, we have little sympathy for senior Office of Planning officials who consider that formation of regional boards, setting up of comprehensive high schools, creation of Holland College, and unification of university-level facilities are acceptable

objectives in themselves. If one accepts this premise, as these officials appear to do, the accomplishment of these structural changes are in themselves adequate as performance indicators. This we cannot accept. We also question the apparent conviction of these officials that, in any case, the effectiveness of such adjustments cannot be evaluated. Their categorical assertion may indicate that they are somewhat out of touch with developments in educational evaluation. We were told that they intend to "look into whether or not drop-out rates have been reduced as a result of introducing comprehensive secondary education", but this was rather indefinite and, to whatever extent it really indicates a lack in their depth of understanding of the true nature of the problem and its possible answers, we find it disconcerting.

3. Educational Planning Within the Department

The present approach to planning in the Department of Education is described as being of a PPBS-type by those who work there. This approach began only two or three years ago and, since it usually takes about five years to install such a system completely, this probably accounts for the general impression we got that it is not yet functioning well.

In order to understand what is going on in PEI education, it must be recognized that the Comprehensive Development Plan called for a great many sudden major changes in the whole structure and approach to education over a brief period of five or six years. These included organizational structure, consolidation of school boards, shifting the approach to school

finance, consolidating university-level offerings into one institution, and making a beginning at installing PPBS. Thus one whole sector of the Department's planning mechanism and planning activities has been concerned chiefly with planning and over-seeing this sudden up-heaval, co-ordinating the various aspects of the change-over which is still not complete.

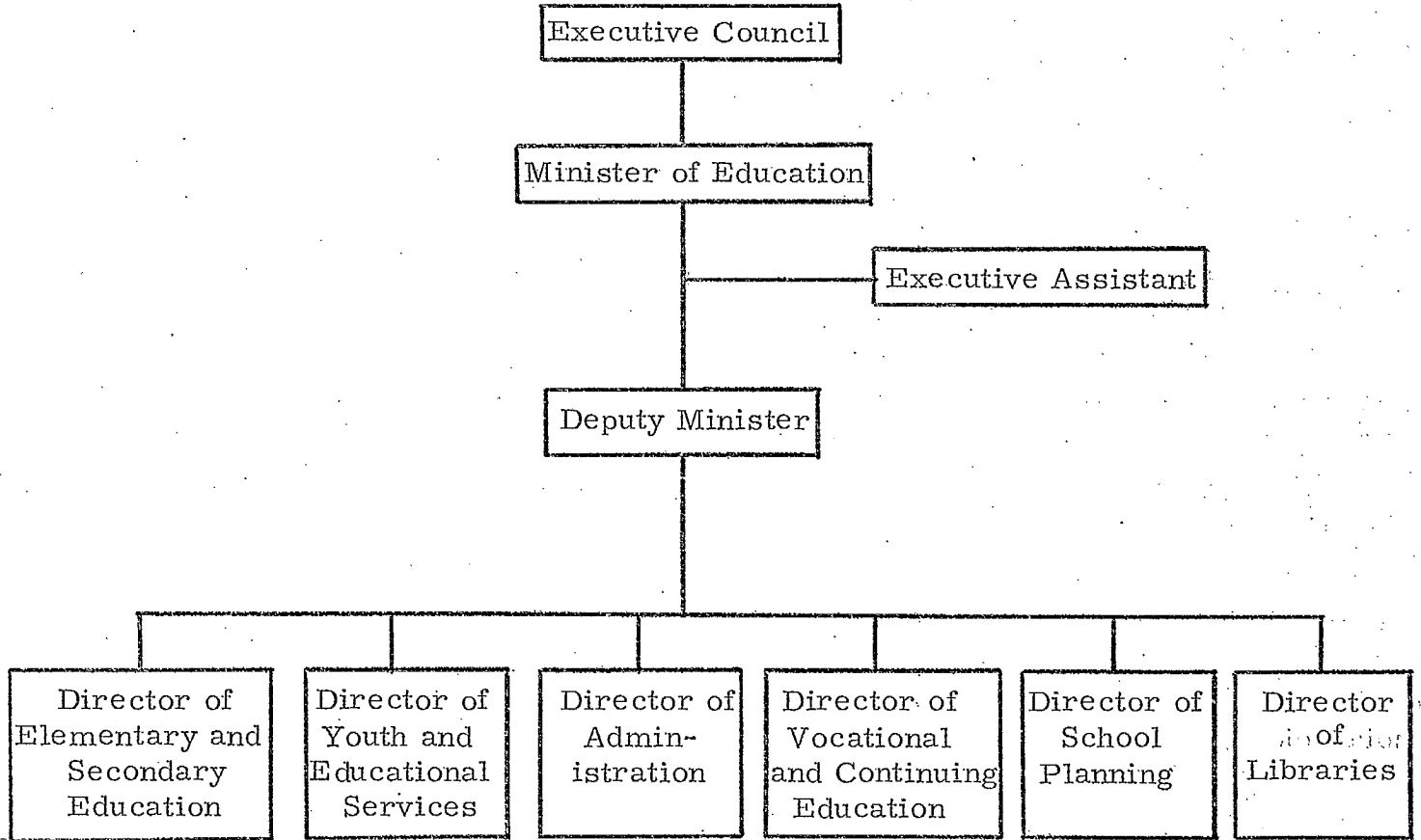
In the midst of this up-heaval, however, schools must continue to operate on a day-to-day basis. Therefore, there is another "layer" of the planning mechanism that is concerned with planning the on-going program. As each of the giant changes called for under the "master plan" is accomplished, planning of those elements reverts to this on-going part of the planning mechanism. Thus, although the change-over is extremely important and its planning must not be overlooked, the mechanism for on-going planning deserves special attention because it will likely be the continuing mode and influence over the long run ahead.

The change-over from over-200 local school boards to five regional district boards is taking place at this time. New regional boards are just being elected and appointed (PEI combines the two approaches) and regional superintendents of schools are being appointed. The regional boards will take over as of July 1, 1972, and there is much that cannot be predicted with any certainty at this point in time. During the current transition year, the educational planning in the province has been centred to an unusual degree in the Department of Education.

The chart on the next page shows the current organizational structure of the senior levels of the Department down to the Directors of Divisions. This truncated chart is provided for general reference but is somewhat deceiving, for its weaknesses show up more clearly at the lower levels indicated in Sub-section (b) of this account, which deals with the "Division of Planning Responsibilities" within the Department. For example, at the lower levels there is a considerable blurring of the lines between the Divisions headed by the Director of Elementary and Secondary Education, and the Director of Youth and Educational Services. The present organizational structure is only two or three years old and is considered something of an improvement over the former situation, but senior Department officials are keenly aware of its weaknesses. We were told confidentially (it has not yet been discussed with other Department staff) that there are plans to revise it drastically along simplified lines that will be more workable in terms of a PPB system. Present thinking is that the new structure will group all program, administration, and finance under their own separate sections.

The fiscal year for all sectors of the PEI Government runs from April 1-March 31, and this sets the time-frame for planning and budgeting -- inconvenient though it can often be when related to September-to-June school years. The PPBS so far was said to relate almost-entirely to finances, but even financial procedures are not yet well-defined -- in part because estimates directly related to the schools, themselves, will

SENIOR ORGANIZATIONAL CHART
(Prince Edward Island Department of Education)
(1971-72)



originate in the five regional school boards that will not officially come into being until July 1, 1972. (In mid-May, a working group on "systems" completed its first draft of procedures to be followed in connection with budgeting by the regional boards.) At the moment, as nearly as we could learn the situation, budget estimates and related supporting evidence (of varying degrees of adequacy) are prepared by the Directors of the respective Divisions in the Department -- in consultation not only with their own staff but also, because of the present rather-confused state of organizational lines among Divisions, with staff in other Divisions as well. These program proposals and estimates move from the Directors to the Deputy Minister and Minister for consideration and co-ordination, then go to the Executive Council's Planning Board for program policy review and to the Treasury Board for financial review. As indicated by the remarks made by the Office of Planning (see page 48), the form in which the proposals are received at present is far from adequate and systematic.

To date, Treasury Board has not shown a disposition to consult back with the Department when making cuts it considers necessary, but there are signs that this situation may improve at least somewhat in future years. The approved program and budget comes back to the Department and is channelled to the respective Divisions for implementation. Because of blurred lines of responsibility at the moment, implementation effectiveness still depends to a high degree on personal diplomacy and co-operation on the part of the several Directors and Divisions that must often be

involved. Fortunately, the individuals concerned appear to be managing to co-operate quite well in spite of the structure.

Buildings are a special case, which can more-suitably be dealt with under Sub-section (b) (ii). As already indicated, planning of program is largely centralized in the Department at present, and will also be dealt with later in greater detail.

There exists a "Philosophy of Education for Prince Edward Island" which was prepared by the Educational Planning Unit in January, 1970. This statement constituted the first attempt to define broad goals and, as the title indicates, is philosophical and general in nature. Even the section of this document headed "Behavioural (Term) Objectives of Our Philosophy of Education" paints in such very broad strokes that direct evaluation would be very difficult and it does not, in fact, make any reference to time-frames. Still, it is a necessary and important beginning and can serve as a base for the development of operational objectives.

Periods of time covered by the different aspects of educational planning in Prince Edward Island are not uniform, a fact which is symptomatic of the degree to which integration of plans is somewhat erratic at the present time. There is no provision for regular review of philosophy and policy within the Department, itself. Finances are planned in terms of five-year projections. Buildings are planned within a "master plan" covering five years, and program is reviewed rather unsystematically on a continuing basis which "peaks" once a year just because of the budgeting process whose schedule is geared to the fiscal year.

It should be noted that, under the Comprehensive Development Plan, the whole basis of educational finance has been converted to a "Foundation Program" which provides provincial funding on a uniform equalized basis of a common level of educational programs in all sections of the island. This is revolutionary in PEI. Legally, there is unlimited provision under the Program for forefront provisions by individual boards that can convince local ratepayers to supplement these funds -- but the offerings under the Foundation Program are reasonably adequate and far ahead of earlier provisions in most of the island. Thus the passing by ratepayers of such supplementary votes is far less likely than would have been the case five years ago.

Any and all criticism in the foregoing account must be tempered with a realistic understanding of the situation that existed in this province as recently as three years ago. Not only was there no effective attempt at educational planning, but the educational system itself was in chaos. There existed over-300 individual school boards on this tiny island, an impossible basis for financing education, two unco-ordinated rival teacher training institutions, and a Department of Education which was woefully inadequate both in terms of organizational structure and quality personnel. It is nothing short of astonishing how much has been done in three short years to improve almost every one of these situations, along with other related improvements! There is, therefore, every reason to expect that further improvement will continue to be made and that weaknesses of the moment (such as those mentioned in this account) will be overcome.

(a) Special Planning Unit

There is within the Department of Education a special Division of School Planning. (See chart on page 52.) The personnel in this Division consist of:

The Director (B. A. , B. Ed. , with 12 years in PEI schools and broad experience in teachers' organizations, home and school associations, and other community and educational groups in the Island.)

A Planning Officer who undertakes research and statistical tasks. (M. Ed. , but with no special economics or statistical preparation other than regular course work for his general degree.)

1 clerical staff

Members of this unit are not highly trained for educational planning.

However, earlier planning personnel in the initial unit apparently went about their work so forcefully (this may have been unavoidable at the time) that they alarmed Department staff and provoked a reaction against planning. The present staff are intelligent people and, because the Director in particular is well-known at all educational levels on the Island, acceptance of planning and co-operation from other sections of the Department appears to have been restored to a considerable degree.

It is important to note that the terms of reference of the School Planning Division are almost-exclusively related to implementation of the educational portion of the Comprehensive Development Plan -- i. e. what we have called the "change-over". It concentrates most on the aspects of this implementation that affect elementary and secondary education, although it has also given some attention to the vocational education sector.

It should not, of course, be assumed that the Division's preoccupation with the Development Plan means that it has had no effect beyond the immediate limits of the Plan. This is not true of the Division any more than it is true of the Plan itself. Examples of initiatives taken by the School Planning Division which have resulted in changes that will have continuing effect over the long term may be seen in the recent publication of guidelines for school facilities, and in the report on curriculum for the new comprehensive secondary schools being constructed under the Plan.

The present thinking in the Department of Education, as nearly as we could gauge it, seems to be that the School Planning Division is a temporary body to plan and supervise the "change-over" -- and that when the new organization chart is finalized in a year or so (our estimate) the Unit may be replaced with some kind of an "educational resources" body. The thinking on this matter is not too clear, at the moment, and is confined to the Deputy Minister and one or two other senior officials. However, should this thinking prevail, it seems clear that there will not be any special unit -- even a staff unit as distinct from a line unit -- to provide educational planning expertise. The Department would then presumably revert to the pattern now followed in "on-going" planning, with planning duties being exclusively carried by operational Division Directors.

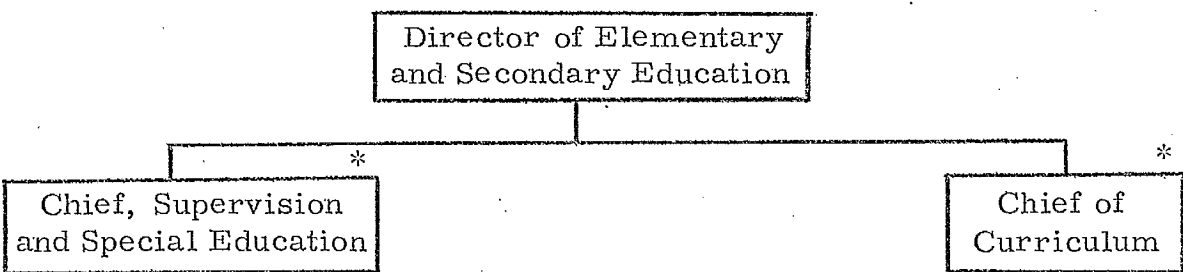
While it exists, the Division of School Planning has considerable status. The Director is widely accepted and respected and regularly involved in almost all discussions or meetings that have any bearing at all

on his work or his interests. He usually accompanies the Deputy Minister to meetings of inter-departmental bodies such as the Human Resources Committee. Thus, he has a wide and great influence -- at least for the time being -- on all aspects of educational development in PEI. He is likely to be assigned to one of the new senior Department posts when his present work phases out and the next reorganization takes place.

(b) Division of Planning Responsibilities

With the exception of planning specifically related to converting major aspects of education in PEI to conform to the patterns prescribed under the Comprehensive Development Plan, primary responsibilities for on-going planning generally follow the pattern of operational program responsibilities. The most notable exception is project management of buildings, as will be explained below. An asterisk (*) in the charts included in the following sub-sections indicates an initial planning responsibility. Superiors up to the Division Director are also shown in each case and, as may be seen from the chart on page 52, it may be assumed that planning responsibilities within the Department flow upwards from there.

(i) Elementary and Secondary Programs



It will at once be obvious that the present separation of responsibilities is not clear, even within this one Division. Program, for example, is split. The Chief of Curriculum has five special subject consultants on his staff, and the Chief of Supervision and Special Education has 16 who cover such diverse fields as guidance, special education and the school for the deaf, correspondence courses, and "educational consultants" and resource teachers. (Vocational subjects such as business education were also included until recently, but are now being moved to the Division of Vocational and Continuing Education.)

In carrying out their planning responsibilities, these officers have access to curriculum committees in almost every conceivable subject area. About 250 teachers (out of a total of 1,600) are serving on such committees, along with subject specialists from the universities and some students. (This last could well prove to be an interesting and promising innovation.) The abundance of committees is explained by the fact that there are separate committees for the elementary, junior high and senior high levels in each subject.

Changes in program are said to be spread over three years, with one year for each of the following steps: (1) design and proposal; (2) pilot projects to test the design; (3) evaluation and (if approved) authorization. Pilot projects are spread throughout a representative sampling of the schools in the province, with an evaluation meeting at mid-year of all teachers involved, and completion of written evaluation sheets at the end

of the year. On the basis of these assessments, the curriculum committee concerned recommends authorization or otherwise to the Minister through the designated Department officials. The process of program review and proposal is thus continuous, although decisions to implement must naturally take account of the timing of the budget year. Special subject committees of the Prince Edward Island Teachers' Federation play a part by sending their views to the Division of Elementary and Secondary Education directly, or by channelling them informally through members of appropriate curriculum committees, thus broadening the planning base still further.

We had no chance to verify the above account or to assess its effectiveness, but inquiries in a few sectors lead us to believe that this procedure is working quite well compared with the situation in some other provinces which may be handicapped because of their larger size. The weakest elements in PEI's program planning are the absence to date of firm program objectives and (the other side of the coin) the absence of on-going evaluation provisions that would provide substance for orderly feedback into the planning process. Division officials plan to improve this situation "sometime", but in any event it must await the installation and running-in of the new district school boards. It may be added that some attempt is made to keep generally in step with curricula in the other Atlantic Provinces through semi-annual meetings of curriculum officials in the four provinces.

To date, "vocational" programs in the elementary and secondary schools have been limited to home economics and business education. With the advent of the new comprehensive high schools, industrial arts (integrated shops, not unit shops) will be offered, but it appears that this may fall under the Vocational and Continuing Education Division rather than under this one. (The need for the new organizational structure in the Department becomes increasingly clear.)

(ii) Elementary and Secondary Buildings



There is really no way to chart on-going planning responsibilities for elementary and secondary school buildings at the moment. No doubt the new district school boards will have some potential for initiation of projects, but procedures will likely be integrated with general budgeting procedures -- the first draft of which reached the desk of the Deputy Minister from the Systems Working Group of the Department of Finance on the morning of our departure from PEI.

In any case, school construction for the foreseeable future is likely to consist entirely of the priorities that have already been determined under the Master Plan. This plan was developed within the lines indicated by the Comprehensive Development Plan, and covers the first five years. During that period \$24,000,000 will be spent on school construction -- \$12,000,000 received as an outright federal grant; the other \$12,000,000

received as a federal loan. Two sets of priorities were defined by the Educational Planning Unit (a central representative advisory body not to be confused with the School Planning Division) in consultation with the five Area Planning Boards. The members of each of these Boards were representative of the trustees, teachers, and the home and school association in the new region. Originally, it had been hoped that both levels of priorities defined by the Educational Planning Unit could be accommodated by the \$24,000,000, but it now appears that only the first group of schools can be constructed for this amount of money.

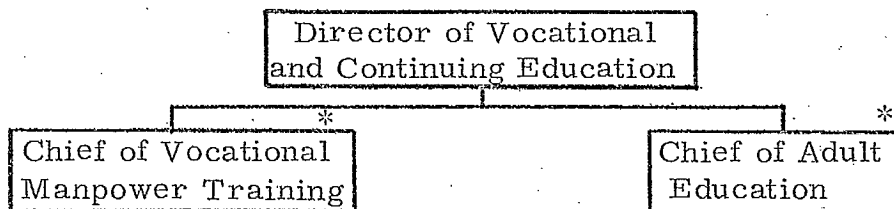
Program management with respect to buildings falls to the Director of Elementary and Secondary Education. Project management is the responsibility of the Department of Public Works. Liaison between the two appears to be remarkably good, due in large part to remarkable interest in his duties on the part of the Public Works architect assigned to the work. It is envisaged that, as of the installation of the new regional district school boards, the board will be asked to recommend alternative sites and to react to preliminary drawings by the architect. All this, of course, is in the future.

A significant point is that a School Design and Facilities Committee, in consultation with the curriculum committees, has recently produced the first PEI School Design and Facilities Manual. This publication is still being augmented and adjusted, but even its first edition provides very clear specifications and guidelines. The manual is to be provided to architects, together with educational specifications and information on size, site, costs, etc.

The five-year plan for new construction includes renovations and extensions. To date, there are no guidelines for local boards in regard to maintenance standards. This is specially important since, under the new Foundation Program, boards will have considerable freedom in transferring funds within major budget categories such as "Maintenance", and will no doubt need some guidance if preventative maintenance is to be achieved.

Trends foreseen in the development of educational programs and methods have had a marked impact on school design in the province. PEI is committed to building flexible space schools with resource centres. The word "flexible" is stressed, since such a policy avoids rigid and immediate requirements to move abruptly into methods such as team teaching that require open space. At the same time, the new schools permit innovative use, if and as local leadership -- and teacher desires and competence -- make such use advisable. This is a principle which we support. It has proven to be more than an empty promise of adventures in teaching, for the first such school constructed in PEI is already being used as a totally open-space school. The next may not be used in this way and, in our view, it should not until needs indicate the desirability of such methods and the staff feels ready.

(iii) Adult Education (Including Training and Retraining)
Programs and Buildings



This Division's planning responsibilities are relatively clear-cut, although they may become less so as the responsibility for secondary school vocational training of all kinds is transferred to it. Leaving that aside, the Chief of Vocational Manpower Training at present really oversees only two institutions: the Provincial Vocational Institute; and the Prince County Vocational High School. The former provides training for adults, as well as for students of high school age who have left the academic school system; the latter accommodates only students of high school age. In both institutions, students of high school age spend 50% of their time in academic studies and the other 50% in training for their trades. (Holland College does not come under the Department's jurisdiction. It has its own board of governors and reports through the Minister of Education only for financial purposes.)

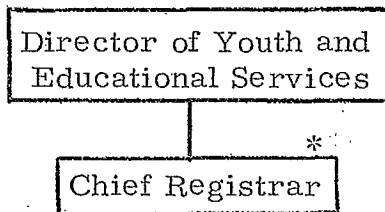
There are indications that, prodded by officials in the Office of Planning, certain responsibilities now borne by this Division of the Department may be transferred to Holland College. Mentioned specifically were the Hand-Craft Centre and all manpower training and retraining. Related to the last is the fact that, with the construction of the new comprehensive high schools (with their industrial arts program patterned after Alberta), the Provincial Vocational Institute and what is at present named the "Prince County Vocational High School" will be able to convert to out-and-out trade schools. We see a possible gap in the fact that there may remain teen-age trade training requirements of a more intensive nature than the

high school industrial arts programs. Perhaps the intention is to accommodate these in the new trade schools, but without the present academic component. This might not be a desirable narrowing of the program.

Public Works has all project management (and maintenance) responsibilities related to the buildings of the two institutions which now fall under this Division. The Chief of Vocational and Manpower Training bears program management responsibilities related to the buildings.

There are some complaints that the Division of Vocational and Continuing Education has developed into a kind of "department within the Department", due to the attitude of an earlier Deputy Minister who did not take any interest in it and was just as happy to have the Director deal directly with the Minister. This problem will likely be resolved in the forthcoming reorganization of the Department.

(iv) Teacher Education Programs and Buildings



No Division of the Department of Education has primary responsibility for planning (or operation) of teacher education. As of the consolidation a couple of years ago, undergraduate academic teacher education is offered only in the Faculty of Education at the University of Prince Edward Island -- which is independent of the Department. Contacts with the

Department that are considered necessary are channelled through the Director of Elementary and Secondary Education.

This is not to say that the Department is without influence in planning these courses. In addition to frequent but incidental contacts by various Department officials, there is the fact that graduates of teacher education courses must meet the standards set by the Chief Registrar in behalf of the Minister in order to receive teaching certificates. Besides the kind of "terminal control" exerted by reason of this fact, an on-going influence is maintained through the Teacher Certification and Standards Committee which advises the Minister on policy and (on occasion) on implications of the teacher education program. This Committee's membership includes the Deputy Minister, the Registrar, the Chief of Curriculum, two representatives of the University, and two representatives of the Prince Edward Island Teachers' Federation.

Recently, two studies of teacher education in the province have been conducted: one by a committee appointed by the President of the University; the other by an outside consultant, Dr. Willard Brehaut, who was commissioned by the Department. Both of these reports are now before the Minister, but the outcome is difficult to predict since they are said to differ in certain key respects. Whatever the details of the final decision, it is certain that teacher education provisions in PEI will be changed substantially -- and it is likely that certification requirements will be raised, with relevant implications for the programs of preparation.

Thus, it may be said that the Department's impact on the planning of teacher education in PEI has been through continuing attempts to influence an autonomous body (the University), and sporadic direct influence through intensive study and review. There are no provisions for graduate studies in education in the Island, and the terms of reference of the Faculty at the university preclude its entering this domain. Presumably, this stricture was imposed with a hopeful eye to the Atlantic Institute of Education located in Halifax, but so far that institution shows little sign of filling the gap. It is likely, therefore, that graduate studies for PEI teachers will continue to be determined primarily by institutions in New Brunswick and the United States.

There are no training provisions for vocational teachers in PEI. Most of the present vocational teaching recruits are trained at the New Brunswick Technical Institute in Moncton, and there is little real consultation between the Department and this institution. There are vague rumours of a new arrangement whereby the vocational teacher training would be split between UPEI (for the academic components) and Moncton (for the vocational components).

(v) Other

The University and Holland College have already been mentioned as institutions outside the official purview of the Department. Their buildings are the responsibility of their respective governing bodies.

Holland College has been doing some interesting things such as running seminars jointly for students and local businessmen, and it is

well-known for pioneering work in the application of the DACUM approach. Basically, Holland College is an "applied arts and technology" institution -- i.e. a community college. Its course offerings include resources planning, business management, general electronics, plant engineering, secretarial arts, commercial art, and a "foundation program" giving the equivalent of Grade 12 standing. Its programs are planned by its Principal, in consultation with its staff.

4. Other Bodies Involved

The complex network of other departments and agencies of government involved with the Department of Education in educational planning in the province has already been outlined. Chief among these are the Office of Planning and the Treasury Board; followed (in a very different way) by the Department of Public Works and the Department of Finance (whose Working Group on Systems has already been mentioned). As a rule, news of DREE programs reaches the Department of Education through the Office of Planning (the old "Department of Development") which is the official contact in behalf of the province with the federal agency.

5. Local Planning -- And Links With the Department

It is impossible at this stage to be definitive about links between local boards and the Department -- or about patterns of local planning -- since the new regional district school boards will not come into being officially until July 1, 1972. Prospects for sound links look reasonably good. Planning of buildings by local boards will require heavy involvement

by the Department (and the Department of Public Works) and Department approval. In any event, there will be little business done in this area for the next few years outside of the now-fixed Master Plan.

In the area of program, the planning is heavily centralized in the Department. While there is substantial local involvement through curriculum committees and participation in pilot projects, every board must stay within fairly-restrictive curriculum guidelines laid down by the Department. The Department claims there is considerable latitude for local initiative within these guidelines. It remains to be seen if this is so and, if it is, to what extent it will be utilized by the boards.

Finally, it may be said with some certainty that everyone involved in education in PEI should be well aware of the planning mechanism that exists, and of the plans that are now in affect. It is difficult to envisage how they could have been more involved or consulted in the process, and involvement is the surest guarantee of awareness.

NEW BRUNSWICK

1. Over-all Provincial Planning

As of the time of our survey in May, 1972, no integrated planning for the Province of New Brunswick as a whole had yet been achieved. However, it had just been announced that a new "Development Policy Secretariat" is to come into being as of June 1, 1972, with terms of reference that will include the co-ordination of plans and programs of all departments and agencies of the provincial government. If this new Secretariat can achieve this objective, integrated planning may become a reality. To date, co-ordination has been restricted to certain sectors such as finance and buildings, but these have not been part of any defined over-all plan.

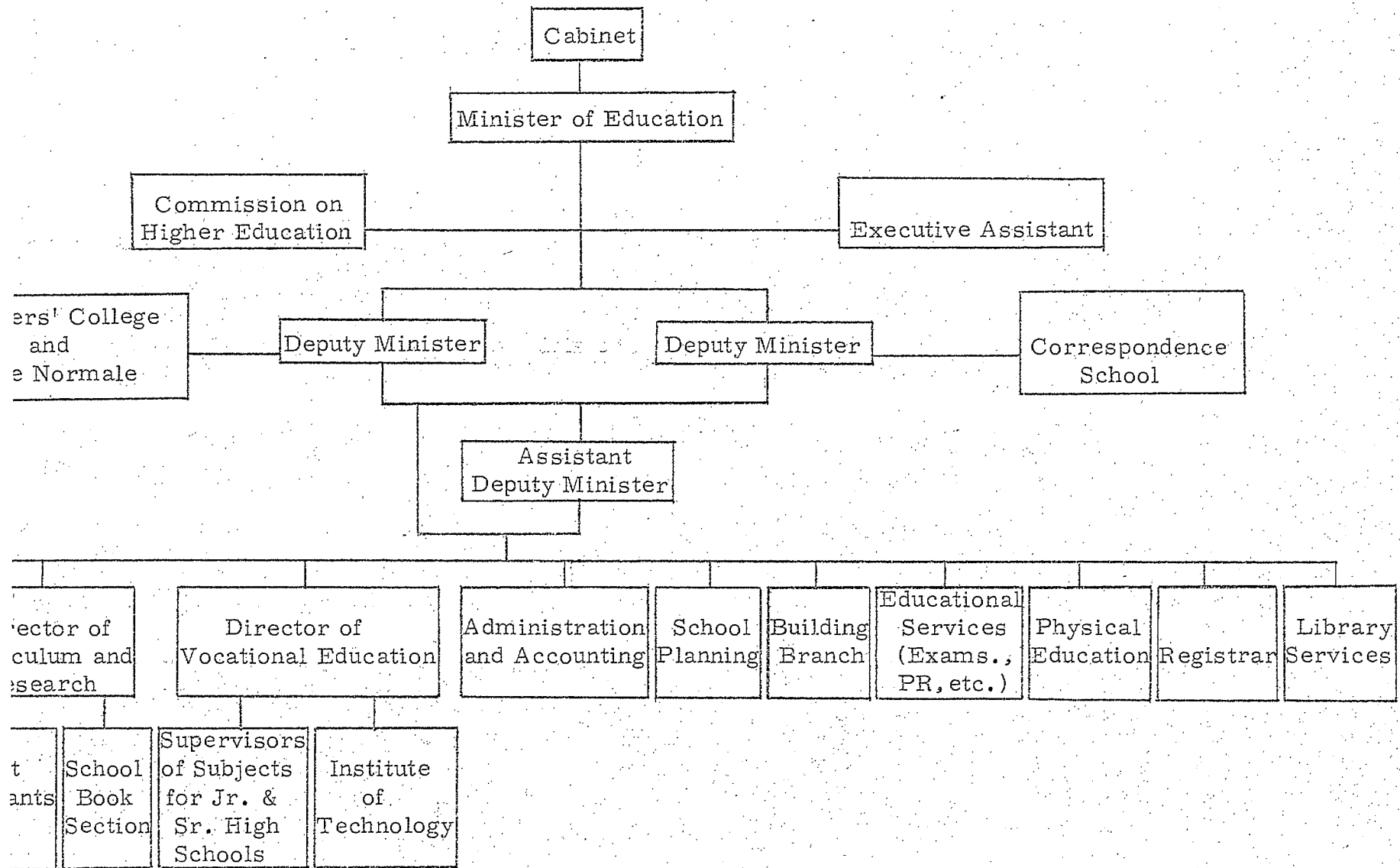
There is a substantial degree of central control in the province -- and this is specially true in the field of education -- stemming from the previous government's declared policy of "Equal Opportunity" which brought sudden major changes in 1967. The present government was elected on a platform which included, among other things, restoration of a measure of decentralization of educational control to the local (district) school boards. However, in the year-and-a half since this government took office, the trend seems to have been to increase rather than to decrease the centralization of power in Fredericton.

In mid-May, 1972 (the time of our survey) many changes were being made both in the government's structure and the distribution of responsibilities. The Department of Public Works had just been renamed the "Department of Supply and Services" and relieved of any responsibility for educational buildings. Plans had just been made to set up the new Development Policy Secretariat. And the Department of Education was just about to undertake a major revision in its organizational structure which, as will be seen, is long overdue.

2. Educational Planning Within the Department

A rough idea of the present organizational structure of the Department of Education may be obtained from the chart on the following page. It is only an approximation pieced together from oral accounts of those interviewed, for no up-to-date chart is available. The Department is aware of the need for change in the structure. Management consultants are at work on recommended revisions and their report is expected by July, 1972. Whatever the details of the new structure, it is certain to be simplified and we were told that a place may be made for some kind of educational planning unit within the Department. We gathered, however, that the intention would be to keep such a unit separate from the facilities planning sectors in the "School Planning Branch" and "Buildings Branch". We would have certain reservations about such an arrangement -- but no firm view can be expressed until the new structure is known.

GENERAL ORGANIZATIONAL STRUCTURE
 (New Brunswick Department of Education)
 (As of May, 1972)*



Revised by September, 1972.

The two Deputy Ministers hold equal rank, and there is no clear division of responsibilities between them. Although one is English and the other French, both deal with matters affecting both language groups. Because of his length of tenure of office, the English-speaking Deputy Minister appears to be considered senior but this is not officially recognized in any way.

There is no truly-integrated educational planning within the Department of Education. More or less independent planning is carried on by the individual branches or divisions, many of which seem to have developed a jealously-guarded sense of independence. (The new organizational structure may bring some rude and painful shocks.) The major unifying factor appears to be the budgeting process, for there are no regular weekly meetings of Branch Directors as a kind of "Management Committee", such as one finds in other provinces.

In 1967, almost the entire responsibility for financing education was transferred from the local school boards (who, as was then general in Canada, had only to command municipal councils to raise the tax revenues they thought they needed) to the provincial government in one sudden move. At the same time, the hundreds of small school boards were consolidated into 33 district boards which became the new "local" boards. These district boards retained the earlier right to raise supplementary moneys from local ratepayers, but only through a complex procedure that gave taxpayers several chances to reject any such

proposals. As a result, in the last five years only one proposal has succeeded in running the gauntlet -- and that was for \$5,000 to provide a school band! The taxpayers obviously feel that if the province is going to fund the schools -- let it!

School budgeting is carried out in New Brunswick within this context of central control. District school board budgets are submitted to the Department through the Regional Superintendents by November 15. Until 1972, each district board met individually with Department officials to discuss its estimates, but these discussions are now conducted by the appropriate Regional Superintendent on the basis of guidelines set in advance by the Department.

Taking account of these district board proposals and their own internal program needs as they see them, the individual branches and divisions of the Department prepare their own budget estimates and submit them for successive consideration and co-ordination by the Department's Director of Administration, the Deputy Minister(s), then the Minister. Finally, they reach the Treasury Board as a set of consolidated Department estimates. In earlier years, the Minister and Deputy Minister had to appear before the Treasury Board to defend their proposals, but this was dropped from the procedure. Under the previous government, Treasury Board stipulated the size of the reductions that had to be made before it was willing to approve the proposals and estimates, but left it to the Department to make whatever adjustments

it wished in order to reach this level. In the first year of the present administration, Treasury Board cuts in the Department's budget were made arbitrarily and without consultation, but at least a certain amount of consultation occurred this year and Department officials are hopeful that this trend will continue. Some of the difficulties that have been encountered with the new Treasury Board may be at least in part due to the fact that none of the Ministers heading major spending Departments (such as Education) are at present represented on it.

The budgeting procedure is not according to PPBS, but it is very formalized and guidelines are provided for procedures and structures to be followed in submissions at every stage. These structures call for rather full justification (under functional categories, as of this year, although in essay form rather than under the more-complete breakdown structuring of conventional PPBS proposals. Our cursory examination left us uncertain about whether or not this categorization according to function will lead to artificial and misleading segmentation in certain areas, but there was no chance to pursue the matter. The procedure for financial planning, then, is at least orderly. Even finances, however, are still being planned in New Brunswick on a year-to-year basis without any longer-term projections being made.

This is not the case in respect to school buildings -- the next most-orderly sector of educational planning. The reference point for school construction is a five-year (some say a ten-year) Master Plan,

which is up-dated annually. Details about planning of buildings appear in Sub-section (b) (iii).

Planning of the instructional program is heavily centralized in the Department by reason of the province-wide curriculum. (It, too, will be more fully described later.) Program planning is continuous in nature, and does not appear to be projected. As the chart on page 72 shows, there are no special branches concerned with educational programs for the many French-language schools in this province. Each branch is expected to meet their needs as well as those of the English-language schools, and some branches have one or two officers who have special assignments related to programs for French schools. In an officially bilingual province, it is noticeable that almost the entire senior and middle management of the Department is English-speaking, and most of these officials have little or no command of the French language.

New Brunswick was one of the first provinces to modernize and define its philosophy of education, to derive general objectives in terms of this philosophy, and to state the requirements that would have to be met by the instructional program to achieve these objectives. Although the latter are rather general, they may be considered satisfactory when viewed in combination with the fledgling provincial program of "co-operative evaluation of instructional programs". Under this new evaluation procedure, schools and school districts are expected to define their own specific philosophies, objectives and requirements within the broad

statements of the Department. All of this -- and much more -- is contained in a remarkable little booklet: The Organization of Instruction for New Brunswick Public Schools (and Other Related Information), first published in 1968 and up-dated with a supplement in 1970. Thus, there is encouraging evidence that policies and objectives are under at least some periodic review, a responsibility that has been specifically assigned to the Assistant Deputy Minister. The latest revision is understood to be in galley-proof stage, awaiting the Minister's authorization to proceed with publication.

There are highlights worth noting in the planning of financial, building, and program sectors of education in New Brunswick. There are some excellent officers in the Department, but it remains to co-ordinate and integrate their work -- not a small task. If the new organizational structure does not solve this problem adequately, and if planning continues to be fragmented as a result, the future will not be as bright as it could be.

There are no effective continuing links between Department of Education planning and that of the province, since neither is integrated. Even the "Deputy Ministers' Association", which once served an informal co-ordination function among the various departments, has degenerated in recent years into a social gathering that meets only rarely -- usually to honour a retiring colleague.

This province has one of the most-centralized control structures for education in Canada. On balance, the results are an improvement over the run-away chaos that existed earlier. Only time will tell if the extreme centralization achieved so suddenly constitutes "over-kill" -- and this is likely to be revealed in the extent to which successive governments see a need to restore at least some measure of decentralized planning and control in the next few years.

(a) Special Planning Unit

The only special planning unit in the Department of Education is the "School Planning Branch". This unit deals exclusively with facilities, and has no part in other aspects of educational planning. At one time it had a large staff, including engineers and architects. More recently, the Department of Public Works (now Supply and Services) took over all actual project management, and the technical staff was released. As of May 1, 1972, all responsibility for educational buildings (planning, construction and maintenance) was returned to the Department of Education, but a new "Buildings Branch" was added to the Department of Education to handle the project management of facilities, and the School Planning Branch is left with its previously-reduced role. Terms of reference and relationship between these two branches were not defined at the time of this survey.

Present personnel of the School Planning Branch consist of a Director, and Assistant Director, and clerical staff. Some of the more

senior clerical staff perform some low-level technical work. The Director and Assistant Director have considerable experience in the Department but have little or no specialized training, although they may well be performing at a high level of competence. Incongruously, the Assistant Director also carries responsibility for co-ordinating all municipal bonds in the province! Apparently, this stems from the old, decentralized days when many of these bonds were related to school building programs. He co-ordinated these so well that, although they have disappeared, the Department of Municipal Affairs asked him to do the same job for all municipal bonds -- and thus it stands.

(Further details about planning educational buildings will be found in the following section.)

(b) Division of Planning Responsibilities

Primary planning responsibilities conform to the general pattern of operational responsibilities. We thought at times during the interviews that we detected an inclination on the part of senior officials to view planning as a function that should be separated from other aspects of management and, if this is true and is realized in the new organizational structure, it would be unfortunate. Present thinking does seem to run towards setting up some kind of educational planning unit in the Department, but the relationship such a unit would hold to the School Planning Branch and the Buildings Branch is not at all clear. It could be a line unit,

although there is a chance that it will be a staff unit with support and co-ordinating functions vis-a-vis the various divisions.

With the change in organizational structure imminent, there is little point in providing segments of the present non-existent organizational chart, as has been done for the other provinces. The approximation of the present structure outlined on page 72 may be useful for reference. Information on initial planning responsibilities is mentioned below, insofar as these were made clear to us.

(i) Elementary and Secondary Academic Programs

The Director of Curriculum and Research, with his staff of eight special consultants, bears responsibility for planning the instructional program in elementary, junior high, and senior high schools. There are about 42 curriculum committees advising them on a continuous basis, with some concentrating on English-language programs and some on French-language programs. The work of these individual curriculum committees is co-ordinated by the Provincial Curriculum Committee. There was no opportunity to check on the effectiveness of this procedure for true involvement of those in the schools in curriculum planning. In addition to the standing curriculum committees, ad hoc committees are formed from time to time to concentrate on specific matters. For example, two current committees of concern to this Branch are studying the possibility of kindergartens and the question of drug education.

As in the other Atlantic Provinces, New Brunswick has a basic, province-wide curriculum and it is said that there is leeway for local boards to vary and broaden this program to at least some extent. One indication that this is probably so lies in the provision for "pilot projects and special programs". Some of these, of course, are pilot stages of new curricula being considered by the Provincial Curriculum Committee. Others, however, originate in the local school systems, are submitted to the Department's Provincial Curriculum Committee and, if approved, are authorized. The latest collective negotiations between the Department and the teachers' organizations resulted in a fund of \$72,000 being allocated to fund these pilot and special projects in the current year. Distribution of this money is delegated to the Director of Curriculum and Research in consultation with the Provincial Curriculum Committee, which meets two or three times a year to consider applications.

This encouragement of local experimentation is a commendable, forward-looking step and is specially important in such a centralized system. Without meaning to carp, we would only point out the unfortunate possibility that local systems making application may have to wait a number of months for approval and are unlikely to be able to launch their project until the following school year. Such a delay can take a lot of steam out of local initiative. Nonetheless, at the time of our visit, 18 pilot and special projects (both provincially and locally initiated) were in progress in high schools, alone, throughout the province. Much of

the ultimate value of such a program will depend on the provisions for evaluation and feedback into the planning process, but the potential is obviously present and great.

At the elementary and secondary level, New Brunswick has also broken some rather new ground in respect to evaluation of schools, which is another (at the moment isolated) piece of the puzzle which could have a great importance for future educational planning in the province. Over the last three years, special committees set up by the Director of Curriculum and Research produced a manual for "self-evaluation of instructional programs" for the elementary schools, and one for the secondary schools. Evaluations were then offered to any schools that wished to apply for them. Those that accept are provided with the manuals and are visited by an evaluation team made up of department officials and some teachers. However, the greatest promise of success in the method lies in its heavy involvement in the evaluation of those actually working in the school. With the guidance and assistance of the visiting team, they follow the manual through a procedure that begins with a review (or definition) of the philosophy and objectives of the school, and moves into some very specific assessment of many aspects of the school program. Attention is given to staffing, facilities, methods and courses -- to mention only a few examples.

For understandable reasons (one of which is the teachers' conditioned reaction against anything they suspect of being a cloak for

merit rating) many schools have hesitated to apply for evaluation. And thus far, there is no clear provision for systematic use of the results in the planning process, although they have been useful for in-service training by the staff of any school that has participated. However, such weaknesses are understandable in this early stage of the program's development, and the Department is wise not to force participation but to let it grow naturally. The evaluation project is a noteworthy beginning in an aspect of planning that too many educators believe cannot be achieved.

All of the above refers only to academic instruction. Vocational instruction in junior and senior secondary schools does not fall within the terms of reference of this Branch, and physical education also seems to be split off. (See page 72.) The resultant problems of dislocation in planning program will be obvious, especially in view of the lack of integration of planning by individual branches in the Department. Hopefully, the revised organizational structure will rectify this.

(ii) Vocational Programs, and Adult Education

Planning and implementation of all vocational programs, of whatever type and level, are at present the responsibility of the Director of Vocational Education and his Branch. (We assume that the Department of Labour has a decided influence on programs related to apprenticeship training.) This Branch also carries responsibility for adult education generally, although we gather that there is very little non-vocational adult activity under the auspices of the Department of Education. The

Correspondence School, which might be expected to fall under this heading, reports directly to one of the Deputy Ministers, as shown on the chart on page 72. This "school" now mainly serves the inmates of penal institutions in New Brunswick, and there is growing pressure from the Department of Education to have it shifted to some other government department because of this fact.

Until May 1, 1972, the Vocational Education Branch also handled the program management of vocational education facilities, with the project management falling to what was then the Department of Public Works. As of that date, this program management was transferred to the School Planning Branch of the Department of Education, and project management was assigned to the new Buildings Branch of the Department. Understandably, terms of reference and future relationships were not at all clear at the time of our visit about three weeks later.

Specifically, the Vocational Education Branch is responsible for all industrial arts, home economics and business education programs at the junior and senior high school levels, and for all manpower training and retraining programs including those offered at the two provincial technical institutes. The latter consist of the New Brunswick Technical Institute in Moncton, and the Saint John Technical Institute. The first offers programs in both French and English, the second in English only. Programs in both institutions are structured along the lines of industrial training (as distinct from the general stream of pedagogical training) and prepare students at all levels of trades up to technician-level.

(iii) Buildings

To summarize the points already made on pages 78 and 83: as of May 1, 1972, the School Planning Branch of the Department of Education is responsible for the program management of all buildings in which instructional responsibility comes under the Department. Unlike the situation in the other Atlantic provinces, this includes the two institutes of technology and the two teachers' colleges (not the universities). Project management, including both construction and maintenance, now falls to the new Buildings Branch of the Department. This Branch is not yet staffed, and the relationship between the two branches has thus far been defined only very generally. (One gathers that some of these developments were unexpected by officials at various levels of the Department.)

The School Planning Branch was largely responsible for creating the present Master Plan of school construction, which looks five years ahead. (The Branch says ten; the Deputy Minister says the term has just been reduced to five.) This Master Plan is up-dated annually. It covers almost all areas of the province, with the exception of major development areas such as Moncton and St. John. School facilities plans for major development areas have to be filled in as needs become clear and are defined with the assistance of the Community Planning Branch of the Department of Municipal Affairs (about which, more later). The district school boards are fully acquainted with the Master Plan. They up-date

the School Planning Branch's information or suggest changes in the Plan's future provisions as they become aware of what they feel to be shifts in local needs or priorities. Such reports are made at least annually or more frequently as the local situation dictates.

The district board concerned is contacted by the School Planning Branch a year in advance of any planned construction under the Master Plan, wherever possible, and asked to provide educational specifications for the project. In preparing these, the board has the benefit of 14 pages of general guidelines on "Facilities", included in the publication: The Organization of Instruction for New Brunswick Public Schools (And Other Related Information) referred to on page 77. For each project, the board is requested to set up a local committee representing all special teaching sectors to be included in the school and sub-committees of teachers in each sector, each sub-committee to be chaired by a member of the main committee. Thus, considerable local involvement (and responsibility for the results) is sought. The board recommends the site unless, as in the major development areas, it has already been reserved under the Master Plan in consultation with the Department of Municipal Affairs.

During its consideration of the board's educational specifications and recommended site (with revision through discussion with the board as required), the School Planning Branch consults special curriculum advisors in the Department and (in future) the Department's Building

Branch. On approval, the School Planning Branch commissions space studies and preliminary sketches from a private architect, who must ensure that his work will meet the specifications of the Fire Marshal, the Department of Health, and (in rural areas) the local Water Authority (for sewage, etc.). Approved sites are purchased by the Department of Public Works (this may become a responsibility of the Building Branch) on the recommendation of the School Planning Branch, in consultation with the Community Planning Branch of the Department of Municipal Affairs. When the architect's preliminary work is approved, he completes it and tenders are called for construction. (Presumably, when it begins to function, the Buildings Branch will be increasingly involved as project manager from the stage of the architect's preliminary sketches, at least.) The district board concerned is kept fully informed and consulted at each stage of the procedure.

There are no school building standards in New Brunswick, in the complete and detailed form that one finds them in some provinces to the west. The School Planning Branch is opposed to such a practice and feels that periodic revision of the guidelines referred to on page 86 will be sufficient, and that it is desirable to permit at least some flexibility to meet unforeseen needs. We have a certain amount of sympathy for this point of view, but doubt that the more-technical Buildings Branch will feel the same. The guidelines may be adequate for writing educational requirements, but may not fill the need for construction standards.

The involvement of the Community Planning Branch of the Department of Municipal Affairs in construction planning within the Master Plan has been indicated above. In the case of the major development areas such as Moncton, where total community planning is being undertaken with DREE's assistance, the Community Planning Branch integrates schools with the total community development plan from the beginning -- and this is then transferred to the Department of Education's evolving Master Plan for school construction. Outside consultants usually prepare the educational requirements reports on which the school component of the community development plan is based, these reports being prepared in consultation with the Department of Education. The Community Planning Branch reports some difficulty in getting definitions of policy from the Department of Education (e.g. small high schools vs. large high schools). However, it recognizes that this is due not only to certain gaps in policy definition, but also to sudden shifts in policy because of purely political considerations at cabinet level. It is worth noting that the capacity of this Branch (and DREE) to have an effect on integrating schools into the total community development plan has come about largely because of the shift to virtually-complete provincial funding of school construction.

Trends in instructional programs and methodology have had a pronounced effect on school design in New Brunswick. Because there has been increasing interest in educational patterns that require open-space schools, present designs attempt to make provision for such use if and

as the teachers are ready for it. Thus interior walls are made non-bearing wherever feasible, and interior classrooms (in "clusters") are provided. Teaching theatres are provided in most secondary schools. Generally speaking, elementary teachers seem more adventurous in terms of new methods than do secondary teachers (this is common in most parts of Canada and elsewhere) -- and technical programs seem most rigid of all at the moment.

Some flexible partitions are provided in many elementary schools but, insofar as possible, only where teachers have agreed in advance to take the in-service programs necessary to enable them to make effective use of open space. Because of non-bearing partitions, closed-space schools can be converted when appropriate. (In the meantime, flexible partitions can be noisy and a nuisance, as well as expensive.) Conversely, the Department has on occasion replaced flexible partitions with solid walls where teachers did not fulfill their earlier in-service commitment. The most noticeable effect on design in the vocational facilities has been the uniform conversion to under-floor electrical ducts in the case of business education areas on the premise that, if anything, the electrification of business equipment will increase in the future.

(iv) Teacher Education Programs and Buildings

The Branch of the Department of Education which is most concerned with on-going matters related to teacher education is the one which really consists of the Registrar's office. Because of his influence and that of

his superiors on certification requirements, he has at least a potential effect on teacher education programs and their planning. He is assisted by an Advisory Committee on Teacher Certification composed of representatives of the teachers' organizations, the superintendents, the Vocational Branch, and senior Department officials.

At present, non-degree academic teacher education is offered at the Teachers' College in Fredericton (English only) and l'Ecole Normale in Moncton (French only). Degree-level teacher training is offered by the Faculty of Education at the University of New Brunswick, by the Education Departments of Mount Allison University in Sackville and St. Thomas University in Fredericton, and l'Ecole de psychologie et d'éducation of the Université de Moncton. (Only the last of these conducts training in French.) The Teachers' College and l'Ecole Normale report to the Department directly through the Deputy Minister. The degree-granting faculties and departments are responsible to the governing bodies of their respective institutions, which report through the Commission on Higher Education directly to the Minister of Education. Thus, there is a blur of lines of responsibility in this sector of educational planning.

Vocational teacher training is just as dislocated, if not more so. Home economics teachers for English-language schools are trained at the Teachers' College in non-degree courses. Those for French-language schools are trained at l'Université de Moncton through degree courses. All business education teachers and industrial trades teachers (as we

understand it, for both secondary and post-secondary levels) are trained in the New Brunswick Technical Institute in Moncton.

Planning of facilities for those institutions responsible directly to one or another level of the Department of Education (i. e. the non-degree institutions) is the responsibility of the Department's School Planning Branch in conjunction with the new Buildings Branch. Facilities planning for the degree-granting institutions is the responsibility of their governing bodies.

The entire teacher education picture is under review at the moment by a U.N.B. professor who is preparing a report for the Minister, in consultation with the many individuals and institutions who have vested interests in whatever recommendations he may make.

3. Other Bodies Involved

Roles of government departments and agencies that play a role in what educational planning is now carried out in New Brunswick have been mentioned in earlier sections of this account. If the newly-announced Development Policy Secretariat performs a co-ordinating and clearing-house function it, too, will obviously have an important effect on educational planning and plans.

Planning of the programs of the institutions that fall outside the direct jurisdiction of the Department (notably the universities and their faculties or departments of education) does not appear to be linked effectively with the planning of those for which the Department is responsible.

4. Local Planning -- And Links With the Department

Planning by local (district) school boards appears to be more closely linked with Department of Education planning than is the case in some other provinces, largely because of the extremely centralized control of education in New Brunswick. Local budgeting proceeds along lines and within limits compatible with the formal and increasingly-structured system decreed for the Department by Treasury Board, and every district board receives a manual on budgeting to assist it with this exercise. The links in facilities planning have already been described on pages 85-88. Within the provincial curriculum, there is at least some leeway for local initiative, as shown by the recent provisions for special projects. It is true that in all of these the local board's role is primarily responsive or advisory, but if one is looking just at links it can be said that the planning links themselves are quite clear and strong.

In the light of the above facts, it was surprising to be told frankly by senior Department officials that they have little confidence that all those directly concerned at the local level have a clear picture of what planning mechanisms exist at present, or even of the plans that are now in effect. Despite the rather clear network provided by the Chief Superintendent of Schools through his seven Regional Superintendents to the locally-employed District Superintendents, the senior officials feel that communication is a greater problem here than in other provinces.

Clarification of this point would likely require, among other things, a complete study of what communications sub-systems do exist

at present. Some of the concern may be due to the closeness of those who voiced it to the situation in their own province and their keen awareness of the weaknesses in their own system, compared with the descriptions they are given by those from other provinces. Some of their concern may also be due to their awareness of the inevitable disorientation of school personnel who have been under a continuing bombardment of successive changes and revisions in all aspects of the school system since 1967. But some of their concern may also rest on the fact that, given the present inadequate and fragmented state of educational planning in New Brunswick, it is impossible to communicate a clear and unfragmented picture to those in the schools.

PART III -- THE DATA SITUATION IN THE FOUR PROVINCES

As indicated in Part II, the starting point for the collection of information on the data situation in each province was the completion of Data Sheets B and C (see Appendix) by one or more officials of the Department of Education designated by the Deputy Minister. These initial responses were then adjusted or augmented as seemed appropriate in the light of information gathered through interviews with other Department officials, or with other sectors of the government that we had an opportunity to contact.

It is significant that Statistics Canada information is generally considered somewhat inaccurate, and that Department of Education officials do not seem to be familiar with manpower data prepared by the various federal agencies. In New Brunswick, the designated official who completed Data Sheets B and C did not appear to be aware of data that were available in some Branches of the Department of Education. (This is consistent with our observations in Part II about the extent of dislocation that appears to exist at present in the planning process in that Department.)

Descriptive Data

Data Sheet B was used to collect information about the availability and adequacy of current descriptive data for educational planning. For each item, up to four symbols are used to indicate the present situation.

Deficiencies are indicated by the omission of one or more of the symbols.

The meaning of the four symbols is as follows:

<u>Data Situation</u>	<u>Code Symbol</u>
Regular or continuing flow	R
Reasonably current or recent	C
Reasonably accurate	A
No serious gaps	N

The following summary indicates the present situation as nearly as we have been able to define it in this preliminary study. Information from all four provinces has been placed in parallel columns to facilitate comparison.

DATA	PROVINCE			
	NS	Nfld	PEI	NB
1. <u>Students</u>				
(a) distribution of total population by area, age, sex	RCAN	RCAN	RCAN	-CAN
(b) demographic trends	--CAN	RCAN	--CAN	---N
(c) enrolment and distribution of students by levels and types of education	RCAN	---N	RCAN	RCAN
(d) student flow and outputs, by levels and types of education	RCAN	--A-	RCAN	RCAN
(e) class-size and grouping patterns (e. g. multi-grade)	RCAN	----	RCAN	RCAN
(Other: Language of instruction)	----	----	----	RCAN

2. Teachers

- (a) number and distribution of teachers by educational sector and level, by age, by sex, by qualifications -- i. e. "stocks of teachers".
- (b) rates of loss and return of trained teachers (gross and net)
- (c) student/teacher ratios

3. Other Personnel

- (a) number and distribution of administrators and other supervisory personnel
 - (b) number and distribution of para-professional staff in schools
 - (c) number and distribution of non-teaching staff in schools
 - (d) ratio of each -- and all -- of above to teaching staff
- (Other: School bus drivers, age and experience)

4. Student Places in Buildings

- (a) current space standards for educational buildings, by type and level of education
- (b) present space provisions in educational buildings, by type and level of education (sq. ft. for standard areas, sq. ft. per student, etc.)
- (c) number and distribution of student places available according to standards
- (d) rating of condition of pupil places

NS	Nfld	PEI	NB
RCAN	-CAN	--CAN	RCAN
RCAN	-C--	---N	RCAN
RCAN	-CA-	RCAN	RCAN
RCAN	RCAN	RCAN	RCAN
(none)	(none)	(none)	RCAN
RCAN	----	---N	RCAN
---N	----	----	RCAN
----	----	-CAN	----
----	----	RCAN	-CA-
--A-	RCAN	---N	----
----	----	RCAN	----
----	-C--	-CAN	----

5. Program

- (a) distribution of course offerings and objectives or standards, by type and level of education
- (b) evaluative data on achievement of objectives or standards

6. Finance

- (a) recurrent expenditures: showing source of funds; allocations; and disbursements
- (b) capital expenditures: showing source of funds; allocations; and disbursements
- (c) educational expenditures in relation to other expenditures and by type and level of education
- (d) distribution of total provincial capital educational expenditures by type and level of education
- (e) comparison of recurrent and capital expenditures
- (f) educational unit costs -- recurrent and capital

7. Manpower

- (a) manpower requirements
- (b) distribution of labour force by level and type of occupation, age, sex and qualifications
- (c) comparison of labour force with manpower requirements

NS	Nfld	PEI	NB
-C--	-C--	---N	RCAN
RCA-	----	----	-CA-
RCAN	-C--	RCAN	RCAN
RCAN	----	RCAN	RCAN
-CAN	-C-N	-CA-	-CA-
-CAN	-C-N	----	RCAN
----	-C-N	----	----
----	-C-N	-CA-	----
----	----	----	----
----	----	-C--	----
----	----	----	----

8. Policy

- (a) current relevant policy or educational objectives of the government
- (b) current policy or objectives of the education system, itself

NS	Nfld	PEI	NB
----	----	R---	----
-C--	----	R---	-C--

With respect to financial data, PEI notes that there is a serious lack of data on even the recent past. There are plans to develop a reporting system and data storage that will rectify this situation in the future. In the same province, data on certain unit costs (e. g. teachers' salaries) and total capital expenditures are reasonably current and accurate. Others, such as transportation costs remain inadequate, mainly due to the poor reporting system of the old local school boards.

Newfoundland reports that a manpower study has recently been completed by the Department of Community and Social Development.

Data Projections

Information on the present availability of data projections that have been found useful for educational planning was collected initially by completion of Data Sheet C. For each item, one or more of the five code symbols have been used to describe availability of projections or the present practice in regard to their preparation. The meaning of the five symbols is as follows:

<u>Projections Prepared</u>	<u>Code Symbol</u>
Seldom, or never	1
Only when requested	2
Regularly (every year)	3
Regularly (every 2 or 3 years)	4
Regularly (in advance of each planning period)	5

PROJECTIONS	PROVINCE			
	NS	Nfld	PEI	NB
<u>1. Student Projections</u>				
(a) population distribution	--3--	1----	--3-5	-2---
(b) enrolment distribution	--3--	1----	--3-5	--3--
(c) flow and outputs	--3--	1----	-2--5	1----
<u>2. Teacher Projections</u>				
(a) stocks and distribution of teachers	--3--	-2---	---4-	--3--
(b) student/teacher ratios	--3--	-2---	--3--	--3--
<u>3. Other Personnel Projections</u>				
(a) stocks and distribution of administrative and other supervisory personnel	--3--	1----	----5	1----
(b) stocks and distribution of para-professional staff in schools	(none)	(none)	1----	(none)
(c) stocks and distribution of non-teaching staff in schools	--3--	1----	----5	1----
(d) ratios of each -- and all -- of the above to teaching staff	-2---	1----	----5	1----
<u>4. Student Place (and Building) Projections</u>				
(a) student places required, by type and level	-2---	1----	----5	----5
(b) space provisions in educational buildings, by type and level, compared with need according to predicted space standards	-2---	1----	----5	----5
(c) rating of condition of pupil places	1----	1----	---4-	1----

5. Program Projections

- (a) elementary and secondary
- (b) vocational and adult education
- (c) youth
- (d) school libraries
- (e) driver education
- (f) (through Annual Program Review)

6. Financial Projections

- (a) recurrent expenditures
- (b) capital expenditures
- (c) comparison of recurrent and capital expenditures
- (d) educational unit costs -- recurrent and capital

7. Manpower Projections

- (a) manpower requirements
- (b) labour force, and its distribution
- (c) comparison of labour force with manpower requirements

8. Policy Projections

	NS	Nfld	PEI	NB
	↓	↓	---	↓
	---	---	5	---
	---	---	5	---
	---	---	5	---
	---	---	5	---
	↓	↓	---	↓
	-3--	1----	---	-3--
	---	---	---	---
	-3--	1----	5	1----
	-3--	1----	5	5
	-2---	1----	5	1----
	-2---	1----	5	1----
	(not made in Dept. of Education)	(not made in Dept. of Education)	1----	----
	---	---	-2---	----
	---	---	1----	----

The situation in regard to "Policy Projections" proved difficult to code. In Nova Scotia, the matter seems to rest with the Premier and members of his cabinet -- especially the Minister of Education -- who make ad hoc pronouncements which may, or may not, arise out of the

Department's annual program review. In PEI, the government's educational policy has been established in broad terms for the next five years, under the education sector of the Comprehensive Development Plan. In the other two provinces, the situation appears to be much like that in Nova Scotia except that their Departments' internal provisions for program review, on which even-ad-hoc political decisions may be based, seem to be less formal and systematic.

PART IV -- COMPARISONS AMONG THE FOUR PROVINCES

In comparing the present state of educational planning in the four Atlantic Provinces, we have limited our observations to the salient features. More-detailed information on each topic will be found in Parts II and III.

PROVISIONS AND MECHANISMS FOR EDUCATIONAL PLANNING

Over-all Provincial Planning

At present, integrated over-all provincial planning is being carried out only in Prince Edward Island where the Comprehensive Development Plan is being co-ordinated by the Office of Planning (previously called the Department of Development) and the Planning Board. This integrated plan is described as "a co-ordinated series of related but separate programs" rather than a total systems approach, as no comprehensive goals have thus far been set. PEI's provincial planning encompasses a fifteen-year term, with the first six-year stage due to be completed in 1976.

None of the other three provinces has any present provision for integrated provincial planning, but all of them are making moves which could result in such provisions. Nova Scotia has a new Department of Development; Newfoundland has a new Department of Economic Planning; and New Brunswick is to have a new Development Policy Secretariat as of June 1, 1972. The terms of reference of each of these new provincial agencies are said to include the co-ordination of all government plans and programs.

Links Between Educational Planning and Provincial Planning

Planning by the Department of Education is linked with over-all provincial plans only in PEI. Details of the ways in which these links are achieved will be found in the appropriate section of Part II. In the other three provinces, what planning links exist between the Department of Education and the province generally are related chiefly to finances and the budgeting process. Even these limited links are often unsystematic and after the fact. They arise almost exclusively out of the budgeting process and follow the schedule set by the fiscal year, which is unfortunately-timed for implementation in the school year.

Educational Planning in the Departments of Education

Only in Nova Scotia has the Department of Education a reasonably-adequate organizational structure at present. The Departments in PEI and New Brunswick have plans for early revision of their structures, but we know of no such plans in Newfoundland.

Nova Scotia's approach to educational planning is along the general lines of PPBS, but is being adapted as it progresses. Present planning is heavily finance-oriented and covers a three-year term, only the first year of which is considered firm. Educational plans are formally reviewed under an annual program-review procedure, but they also receive informal attention on a week-to-week basis from a Management Committee consisting of the Deputy Minister and his three Assistant Chief Directors of Education. Objectives of the Nova Scotia Department of Education and the provincial

system of public education have been defined recently. These objectives and related policies are reviewed only indirectly as they arise incidentally in the course of formal and informal reviews of program, etc.

Newfoundland's present approach to educational planning is informal and ad hoc. Certain specific procedures are defined, but not inter-related. No specific planning term is in effect, but the Minister appears to be inclined to move toward a four-year term at some time in the future. Educational plans, relevant policies and objectives are reviewed and revised as seems necessary on the basis of continuing informal scrutiny by weekly meetings of the Department's Directors of Divisions, but there does not appear to be any routine or system to this scrutiny.

The Department of Education in PEI is in the very early stages of introducing PPBS. At this point, the system appears to concentrate almost exclusively on finances. Planning terms for components of the total education program vary to some extent. Finances and buildings are planned on a five-year term, and isolated features of the educational program on a three-year term. Aside from plans related to conversion and restructuring under the Comprehensive Development Plan, educational programs and relevant policies and objectives appear to be reviewed and revised only as considered necessary by individual Divisions within the Department.

In New Brunswick the Department of Education's planning of finances appears to be increasingly systematic, although not as structured as under

a PPB system. In this province, too, educational planning terms vary -- from one year for finances, to five-ten years for buildings. Planning of instructional programs follows no fixed schedule. There is no provision for periodic review and revision of educational program, aside from continuing informal scrutiny by individual Divisions of the Department. Objectives, however, are reviewed and revised at irregular, but reasonably-frequent, intervals.

Generally speaking, the line Divisions or Branches within each Department of Education have the initial planning responsibility in every province, with the sole exception in PEI of plans for the change-over to the Comprehensive Development Plan. Planning related to universities -- including their faculties of education -- is outside the purview of the Department of Education in every province, although the Department has a residual influence on the latter because of its control of teacher certification. The situation with respect to technical institutes varies. In New Brunswick the technical institutes are responsible to the Department of Education, but in the other three provinces they have the same kind of institutional independence as the universities.

Details of the varied and complex picture of the distribution of initial planning responsibilities will be found in the appropriate sections of Part II, but it may be useful to highlight one feature of the situation with respect to planning facilities. PEI is the only one of the four provinces that has developed detailed standards for educational buildings.

These are contained in a recently-published document which is already being up-dated and supplemented. Nova Scotia and Newfoundland have neither standards nor guidelines for the construction of educational facilities, and both have extremely complicated procedures for proposal, approval and implementation. (At least some of the complexity in the Newfoundland situation is due to the distinctive role of the Denominational Educational Committees in that province.) New Brunswick has a set of guidelines, but we feel that their chief usefulness will be to assist school boards in the specification of educational requirements. There are no explicit standards for educational facilities in this province and the School Planning Branch of the Department appears, at this time at least, to be opposed to setting them.

Special Department of Education Planning Units

All four provinces have special planning units in their Departments of Education. However, the nature, quality, and terms of reference of these units differ markedly.

The Nova Scotia Department of Education has a small support and resource unit which is almost entirely finance-oriented. The qualifications of its Director are high, and the other staff members appear to be developing competence through experience. Newfoundland's educational planning unit has the largest and most highly-qualified staff, but the scope of its activities and its influence are very restricted. It seems most appropriate to consider it a staff rather than a line unit, but no definitive statement can

be made because of the uncertain terms of reference under which it functions. The special planning unit in the PEI Department of Education has a small staff which is not highly qualified, but which appears to be competent and well-accepted, and thus quite effective. It is a temporary unit set up to co-ordinate the planning of all educational aspects of the change-over to the Comprehensive Development Plan. However, it is having considerable influence meanwhile on almost every sector of education in PEI. In New Brunswick, the only special planning unit in the Department of Education at present is the School Planning Branch, which deals only with program management aspects of facility planning. There is some talk of a special educational planning body being included in the forthcoming revision of the Department's organizational structure, but the terms of reference and relationships of such a unit -- if it is, in fact, included -- are not at all clear at the present time.

Local Educational Planning -- And Links With the Department of Education

There is a province-wide curriculum in each of the four Atlantic Provinces. Although in each case it was said that there is considerable leeway for local boards to vary the pattern laid down by the province, they require prior permission from the Department to do so. We had no opportunity to investigate the degree to which local boards are actually availing themselves of the opportunities that are said to exist for local programming. New Brunswick has recently made provision for funding some local innovations, and is likely the most active of these provinces in seeking to encourage local initiative -- at least at the present time.

Nova Scotia Department of Education officials classified local educational planning as ad hoc for the most part. At the same time, there are increasingly-firm links with provincial planning in respect to finances and school buildings. Local educational planning in Newfoundland is also described as ad hoc and informal, although budget pressures are creating links that are primarily financial in purpose. Local educational planning in PEI is as yet an unknown quantity, since the new regional boards will not take office until July 1, 1972. Local planning by New Brunswick boards may be said to be reasonably systematic in respect to finances (the boards are provided with a manual on budgeting) and buildings.

Only officials in the Newfoundland and PEI Departments of Education felt that personnel at all levels of the school system are aware of what mechanisms exist for educational planning, and know the plans that are now in effect. Newfoundland attributes this situation to good communications through the supervisory network headed by the Department's Chief Superintendent. In PEI, the present good communication is a result of heavy involvement of virtually all sectors in recent years. New Brunswick feels that, although channels that should be able to communicate well exist, they are not working satisfactorily at present. Nova Scotia acknowledges a problem of bad communications generally. A current study being done on the role of the school inspector in Nova Scotia may shed further light on the situation, and provide clues to ways in which it might be improved.

Other Bodies Involved

For obvious reasons, the Treasury Board in each of the four provinces is the most noticeable agency (outside of the Department of Education) which has an impact on educational planning. In Nova Scotia, there appears to be no effective dialogue between the Treasury Board and the Department and, in the eyes of the latter, Nova Scotia's Treasury Board appears to be auditor-oriented and arbitrary in its decisions. PEI and New Brunswick also complain of a lack of consultation by their Treasury Boards when the time comes to make adjustments in Department estimates, although New Brunswick reports some signs of improvement. Only in Newfoundland was there reported to be reasonably good dialogue with the Treasury Board in the course of its consideration of Department of Education estimates.

Involvement of other government departments such as Public Works and the Department of Municipal Affairs in school building planning seems to be common in all four provinces. Also common is the usual range of provincial curriculum committees and advisory bodies concerned with specific sectors, such as teacher education or certification. In addition, Nova Scotia has a Foundation Program Committee and an Educational Assistance Committee, neither of which appear to be effective mechanisms for widespread involvement in planning. The most prominent non-departmental agencies involved in Newfoundland's educational planning are, of course, the Denominational Education Committees. New Brunswick's educational planning requires liaison at certain stages with the Community

Development Branch of the Department of Municipal Affairs, which has an input in facilities planning for designated major development areas in the province. PEI shows evidence of the most complete and effective involvement of all conceivable sectors in the province, through myriad committees and councils. It is difficult to predict, at this point, whether or not this pattern of intensive involvement will continue once the major change-over to the Comprehensive Development Plan has been achieved. Regardless of the fate of this wide-spread involvement, however, the decisive roles played by the Office of Planning and the Planning Board appear to be firm fixtures.

THE DATA SITUATION

The parallel columns in Part III permit detailed comparison of the data situations in the four provinces. The following brief observations may help to highlight certain main features.

Descriptive Data

Taken as a whole, the data situations in Nova Scotia and New Brunswick appear to be more satisfactory than in the other two provinces. Newfoundland's descriptive data are the most inadequate.

However, the profile of adequacy is somewhat different for each province. For example, New Brunswick seems to have the best data on non-teaching personnel. PEI has the best descriptive data on school places, and seems to have the beginnings of a flow of reference information on policy. Just as this report was being completed we learned that

Newfoundland recently compiled an inventory of school buildings, but we have no information on the scope or contents of that inventory.

Those we contacted in all four provinces indicated an almost-complete lack of manpower data. However, as already mentioned in the introductory paragraphs to Part III, we suspect that manpower data exist in at least some of the provinces but are not known to those responsible for educational planning.

Data Projections

Probably because its PPB system is farthest advanced, Nova Scotia appears to be more active in preparing or utilizing data projections related to educational planning. Newfoundland is farthest behind in this respect, a fact which Department of Education officials not-illogically attribute to the scarcity of past and current data required for projections.

We do not consider the response to the item on manpower projections satisfactory or very reliable, for reasons already indicated in the above section.

PART V -- SUMMARY, AND CONCLUDING REMARKS

This preliminary investigation indicates that a measure of integrated planning for the province as a whole exists only in PEI, at present. However, each of the other Atlantic Provinces is aware of this need, as shown by their recent decisions to set up special departments or secretariats for this purpose.

Educational planning in all four provinces is in varying stages and forms of early development. The Nova Scotia Department of Education is struggling to take a very systematic approach in the face of a complete lack of integrated planning in the surrounding provincial context. There is considerable evidence of effective educational planning in PEI, but it is focussed almost exclusively on the major transitions required under the Comprehensive Development Plan. While the on-going educational program is at present benefiting from "fallout" from this intensive planning, there is no guarantee that there will be provision for sound, on-going planning of education after the major changes are completed. New Brunswick's educational planning is disjointed and uneven at the moment, but there is an awareness of the need to improve the situation and at least some hope that a more-systematic approach will begin to be developed reasonably soon. Newfoundland's Department of Education has evolved some promising but isolated planning components in one form or another, almost by trial and error. However, the over-all educational planning picture is primitive, despite the availability of considerable technical planning expertise (at present largely unused) within the Department.

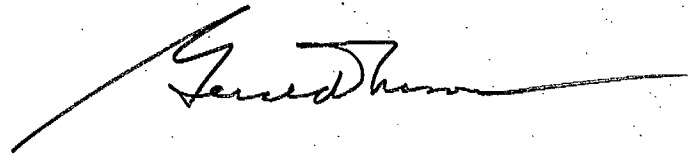
Some of the present inadequacies in educational planning in the Atlantic Provinces are due to deficient organizational structures and lack of expertise. However, the unsatisfactory data situation must also be recognized as a major factor. As will be seen in Part III of this Report, even the flow of current descriptive data essential to sound educational planning (e. g. policy, manpower, student places, educational unit costs) is far from satisfactory at present. The soundest organizational provisions for planning would be "flying blind" unless the data situation were improved greatly, as may be seen from the data descriptions for Newfoundland in Part III.

There is obviously a great deal of room for more-intensive study to validate and clarify the data recorded in this Report. Periodic up-dating is another provision that needs to be made, since it is evident that the situation will change in the near future in directions that are not altogether predictable at the present time.

We have no doubt that, left to themselves, these provinces will gradually improve their educational planning mechanisms and the data required to feed them. However, a major function of outside assistance agencies is to accelerate development beyond its normal pace of evolution. With this in mind, DREE may wish to consider what forms of assistance could acceptably be provided to educational planning in the Atlantic Provinces so as to ensure that specific DREE provisions, such as educational buildings, would fit into a dynamic and organic plan.

Possible avenues of assistance to educational planning that would at least warrant DREE's consideration could range from consultation to accelerate the development of suitable organizational structures, to assistance in developing mechanisms (for example, those needed to provide a continuing flow of planning data). Adequate definition of the key needs in each province -- and of acceptable forms and methods of assistance -- would require separate in-depth investigation, using this preliminary survey as a starting point.

Respectfully submitted,

A handwritten signature in cursive script, appearing to read "Gerald Nason", written in dark ink. The signature is fluid and extends across the width of the page.

Gerald Nason,
President.

June 5, 1972.

APPENDIX I

DATA COLLECTION INSTRUMENTS

PREPARED FOR THIS STUDY

DATA SHEET FOR DREE SURVEY
ON
THE STATE OF EDUCATIONAL PLANNING

Note: For the purpose of this study, educational planning is interpreted as including the planning of all levels and types of educational provisions -- finances, personnel, program, buildings, etc. -- that fall directly or indirectly under the control of the provincial department of education.

A -- GENERAL INFORMATION

1. (a) Is total, over-all planning carried out at present in your province?

(b) If so:

(i) How would you classify it? (formal PPBS, etc.)

(ii) What planning term is now in effect?

(iii) What bodies play a part in it -- and what general role does each play?

2. (a) Is your Department's planning linked with the over-all provincial planning?

(b) If so:

(i) At what stages and levels?

(ii) What kinds of links? Personal? Two-way consultation?
One-way flow of "guidelines"?

(iii) Are the links regular or irregular? Frequent or infrequent?

(iv) What input is expected from the educational system's reporting network into the total provincial planning? What is done with this input when received?

- 3 -

3. How would you classify your Department's present approach to educational planning? (formal PPBS? some other formal method? informal or ad hoc? logical, etc.?) (Please explain.)

4. What educational planning term is now in effect? (1, 2 or 5 years? longer? a combination?)

5. (a) Is there specific provision for periodic review and revision of:
 - (i) Educational plans?

 - (ii) Relevant policies, objectives, etc.?

- (b) If so:
 - (i) Regular or irregular?

 - (ii) At what intervals of time?

 - (iii) How is it done, and by whom?

6. (a) Is there a special planning unit in the Department?

(b) If so:

(i) Where does it fit in the organizational structure?

(ii) Please list personnel, status, qualifications and roles.

(c) If not:

(i) Who, within the Department or the school system are responsible for total planning? What is the status and function of each?

7. (a) What other bodies (departments, boards, committees, cabinet, etc.) play a part in educational planning -- and what general role does each play?

(b) Who has authority to give final approval to total educational plans?

8. (a) Within the general picture, which individual or body (department, division, committee, etc.) is responsible for planning the following:

- elementary and secondary - academic?

- technical/vocational?

- post-secondary?

- adult education?

- adult training and re-training?

- buildings?

- (other)

(b) If responsibility for any of the above is not within the Department of Education, what planning links are there, and how do they operate?

9. After educational plans are approved, what is the mechanism for implementation?

10. What means are used to keep those at all levels of the school system informed about the mechanism for educational planning? About the plans that are now in effect?

11. (a) Is local board planning linked with Department planning?

(b) If so, how?

(c) How would you classify educational planning at the local level?
(formal PPBS, etc.)

12. What future changes, if any, in the picture described above are already known or expected? (Please indicate approximate timing, if known.)

Professional Development Associates
May 1, 1972

DREE SURVEY DATA SHEET

B -- CHECK-LIST OF DESCRIPTIVE DATA

The following is a list of some of the major kinds of current descriptive data which have been found useful to educational planners. Please code the items in the right-hand margin so as to indicate the present situation in your province, using the symbols shown below.

Use more than one symbol, where appropriate. Simply omit a symbol where you feel the relevant feature of the situation is not yet satisfactory for educational planning purposes.

<u>Data Situation</u>	<u>Code Symbol</u>
Regular or continuing flow	R
Reasonably current or recent	C
Reasonably accurate	A
No serious gaps	N

Current Descriptive DataCode1. Students

- distribution of total population by area, age, sex _____
- demographic trends _____
- enrolment and distribution of students by levels and types of education _____
- student flow and outputs, by levels and types of education _____
- class-size and grouping patterns (e. g. multi-grade) _____
- other data on students (please write in and code): _____

Code

2. Teachers

- number and distribution of teachers by educational sector and level, by age, by sex, by qualifications -- i.e. "stocks of teachers".

- rates of loss and return of trained teachers (gross and net)

- student/teacher ratios

- other data on teachers (please write in and code):

3. Other Personnel

- number and distribution of administrators and other supervisory personnel

- number and distribution of para-professional staff in schools

- number and distribution of non-teaching staff in schools

- ratio of each -- and all -- of above to teaching staff

- other data on non-teacher personnel (please write in and code):

4. Student Places in Buildings

- current space standards for educational buildings, by type and level of education

- present space provisions in educational buildings, by type and level of education (sq. ft. for standard areas, sq.ft. per student, etc.)

Code

- number and distribution of student places available according to standards

- rating of condition of pupil places

- other data on student places (please write in and code):

5. Program

- distribution of course offerings and objectives or standards, by type and level of education

- evaluative data on achievement of objectives or standards

- other data on program (please write in and code):

6. Finance

- recurrent expenditures: showing source of funds; allocations; and disbursements

- capital expenditures: showing source of funds; allocations; and disbursements.

- educational expenditures in relation to other expenditures and by type and level of education

- distribution of total provincial capital educational expenditures by type and level of education

- comparison of recurrent and capital expenditures

- educational unit costs -- recurrent and capital

- other data on finance (please write in and code):

Code

7. Manpower

- manpower requirements _____
- distribution of labour force by level and type of occupation, age, sex and qualifications _____
- comparison of labour force with manpower requirements _____
- other data on manpower (please write in and code): _____

8. Policy

- current relevant policy or educational objectives of the government _____
- current policy or objectives of the education system, itself _____
- other data on policy and objectives (please write in and code): _____

C -- CHECK-LIST OF PROJECTIONS

Not all of the projections used by educational planners are produced by the Department of Education, but some which are often found useful are listed below.

Please code the items in the right-hand margin to indicate how available each kind of projection is in your province, using the symbols shown below. Once again, use more than one symbol, if appropriate.

<u>Projections Prepared</u>	<u>Code Symbol</u>
Seldom, or never	1
Only when requested	2
Regularly (every year)	3
Regularly (every 2 or 3 years)	4
Regularly (in advance of each planning period)	5

Projections Available

Code

1. Student Projections

- population distribution

- enrolment distribution

- flow and outputs

- other projections of student data (please write in and code):

Code2. Teacher Projections

- stocks and distribution of teachers _____
- student/teacher ratios _____
- other projections of teacher data (please write in
and code):

3. Other Personnel Projections

- stocks and distribution of administrative and other
supervisory personnel _____
- stocks and distribution of para-professional staff
in schools _____
- stocks and distribution of non-teaching staff in schools _____
- (ratios of each -- and all -- of the above to teaching
staff) _____
- other projections of non-teacher personnel data
(please write in and code):

4. Student Place (and Building) Projections

- student places required, by type and level _____
- space provisions in educational buildings, by type
and level, compared with need according to predicted
space standards _____
- rating of condition of pupil places _____

Code

- other projections of student place data (please write in and code):

5. Program Projections

- (please write in and code, if any):

6. Financial Projections

- recurrent expenditures

- capital expenditures

- comparison of recurrent and capital expenditures

- educational unit costs -- recurrent and capital

- other projections of financial data (please write in and code):

7. Manpower Projections

- manpower requirements

- labour force, and its distribution

- comparison of labour force with manpower requirements

- other projects of manpower data (please write in and code):

Code

8. Policy Projections

- known government and education system policy for the period of the projections
 - other projections of data on policy or objectives (please write in and code):
-

Professional Development Associates,
May 1, 1972.

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