

ASSESSMENT OF CONCERNS AND RECOMMENDATIONS

**SCHOOL
DISTRICT
27**

CARIBOO-CHILCOTIN

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DATE: February 22, 2018

PREPARED FOR: Honourable Rob Fleming, Minister of Education, for **Information** at the request of Deputy Minister, Scott MacDonald

SUBJECT: School District 27 Cariboo-Chilcotin – Cariboo-Chilcotin Teachers Association (CCTA) Non-Confidence Vote

PURPOSE: Update on the requested assessment of the issues within the school district, which were provided by the CCTA.

BACKGROUND

School District 27 is a geographically dispersed district. It has 23 schools and a student population of approximately 4,700 FTE.

A vote on a motion of non-confidence was conducted by the CCTA in the Fall, prior to November 26, 2017. The vote of non-confidence included the Board, the Superintendent, and the Secretary-Treasurer. The Areas of Concern stated in the CCTA document, and circulated in a press release, identify three main areas of concern:

1. Personnel Practices
2. Contract Compliance
3. Financial Budgeting

ASSESSMENT PROCESS

Conducted an assessment of the concerns expressed in the vote of non-confidence by the CCTA. This was the second vote of non-confidence by the CCTA in the past 12-14 months.

- Met with the Superintendent at the BC School Trustees Association (BCSTA) Academy, November 23 and 24, 2017 – to discuss the CCTA non-confidence vote and to arrange a visit to SD27.

- Three visits to Williams Lake to meet and conduct interviews with the Superintendent, Secretary-Treasurer, Board Chair, Vice Chair, trustees, representatives from the CCTA, Cariboo-Chilcotin Principals'/Vice Principals' Association (CCPVPA), Directors of Instruction, parents, board office staff, IUOE President, former trustees, and Assistant Superintendent. (The visits took place November 28 and 29, December 7 and 8, and February 13 and 14).
- Additional meetings and phone calls with BCSSA Executive Director(s) and President, BCASBO Executive Director, BCPVPA Executive Director, as well as follow up phone calls and in-person meetings with the above-listed groups and individuals.
- Worked with the Ministry of Education, Finance Department to seek clarity on finance and budget issues within the district and analyze the previous audit process and budget.

DISCUSSION

Information gathered from interviews, phone calls, meetings and email

According to most interviewees, the school district is described as having problems for many years. The stories told during the interviews described poor relationships, and disrespectful behaviour of trustees, staff, and community members. Those poor relationships have persisted over long periods of time, and tensions from those problematic relationships remain.

Many interviewees described the district as being rudderless, without direction, and without a cohesive and coherent plan for improving student outcomes. Staff described frustration that they are not included in developing the district's direction, and do not feel respected as experts in the field or as members of the school district community.

SPECIFIC AREAS OF CONCERN

Governance

Several of those interviewed stated they feel the board, but more specifically the Board Chair, often engages in the operational work of the district. [REDACTED]

[REDACTED]. From observations and interviews, it appears that the board has appropriate processes in place and works carefully with policy reviews to ensure the work on the board has a good governance foundation.

The issue of communication appears to stem from what is described as a problem with relationships across the district, [REDACTED]

General observations of the board's governance work are that it is acting in accordance with appropriate board procedures. The board chair and most trustees feel that the complaints about the board are not as much about the procedural work of the board, but more about the relationship issues that exist between the board and the CCTA and the CCPVPA.

It has been expressed that current committee structures and processes are not meeting the needs of the community or stakeholders. Meeting agendas are developed or changed at the last minute without providing advanced notice to stakeholders. Furthermore, meetings are sometimes cancelled without adequate notice, leading to anger and frustration on the part of the participants who have made arrangements to attend the meetings.

The February Governance Committee was recently held and the CCTA and CCPVPA did not attend. When the president of the CCTA was contacted regarding the reason he was not in attendance, he said the meeting agenda contained questions that would require input from his executives before he would be able to answer them. When the senior staff was asked about the committee meeting agenda and the expectations of those in attendance, they stated that the budget process always began with a set of questions and that the stakeholders were not being asked to answer the questions that day. Instead, stakeholders were being asked to bring the questions back to their membership and then report back at the next Governance Committee meeting a month later. This is an example of ineffective communication and a lack of trust and respect that impacts relationships and functioning across the district.

The second concern about governance expressed by those interviewed centers around the dual CEO/CFO reporting roles of the Superintendent and Secretary-Treasurer. Stakeholders suggest that this dual CEO/CFO reporting model contravenes the district policy and the *School Act* and has led the school district community to mistrust the board.

The model of a dual CEO/CFO reporting to the board was intended to be a temporary measure, during the time an Acting Superintendent would be in place. Once the permanent Superintendent was hired the plan was to revert to the former organization structure of one CEO reporting to the board. The Superintendent has now been in place since April 2017. Many of those interviewed feel that the continuation of the dual CEO/CFO reporting signals that the board intends to continue with this model. Many have commented that they do not know who the leader is, therefore, it creates confusion about who has the ultimate decision-making authority.

Another concern frequently expressed was that this dual CEO/CFO reporting model seems to have led to a reduced focus on learning, student achievement, and the educational goals of the district. Some have expressed that the district has been far too focused on business operations in the district, which has tended to override the educational goals and objectives in the district.

Finance and Budget

According to those interviewed the budget and finance processes do not have adequate input from stakeholders and that communication about the budget and finance needs to be improved in order to build trust and gain respect from the field.

The district currently relies on utilizing the budget surplus midway in the year, rather than building it into the budget for the entire year, which would allow a much more efficient use of those funds. During a recent Ministry of Education Financial Audit, the recommendation was made that the district should change this practice, allowing the funds to be utilized more effectively.

There is a lack of trust in the district budget and finances, and this is viewed as a significant contributor to the district's low morale.

Leadership

In addition to the CCTA, school leaders, district leaders, and some parents have expressed mistrust and non-confidence in the [REDACTED]. They feel they have been left out of important decision-making. They also suggest that problems in the district have often been left for far too long, to the point of more serious issues arising as a result, creating dysfunction and burn-out in school and district leaders.

Interviewees have suggested that there is a 'power triangle' that all staff and community members must navigate in order to get anything done. This power triangle is described as consisting of the [REDACTED] and that this power triangle does not listen to other community members, making them feel under-valued and unimportant.

Concern has been expressed that the superintendent does not include the senior education staff in important educational decisions. There are three highly experienced Directors of Instruction and there is concern that they are not being included nor consulted about important decisions, such as Principal or Vice Principal transfers or hires. Leaders in schools and the district also expressed that

there is too little emphasis on student learning and instruction in the district, and far too much time and emphasis placed on the business and financial side of the district.

The relationship that the board and senior staff have with the CCTA and the CCPVPA is challenging. Comments have been made that indicate this has been the case for some time. While it is accepted that there will be disagreements and differences of opinion, members of the board have all suggested that the board has not been shown respect by the CCTA or the CCPVPA, and that this needs to be remedied. The CCTA and CCPVPA have similarly stated the concern that they do not feel they have been shown respect by the board or senior staff. Trust and respect among community members are critically essential to a healthy organizational culture and the issue of problematic relationships in the Cariboo-Chilcotin school district must be addressed.

Morale (*relationships, trust, respect*)

Morale has been expressed as being at an ‘all-time low’. The district has a few staff on leave and it has been suggested that more will be going on leave or will leave SD27 to work in other districts. Most of those interviewed discussed that the cause of low morale across the district stems from poor relationships, lack of respect, and a complete lack of trust.

The CCPVPA contract should have been settled many months ago, and although there was patience early on in the year because everyone understood the extreme stress level due to the fires and evacuations, that goodwill was said to no longer exist. The Superintendent, Secretary Treasurer and Board Chair initially insisted that the salary increases the Principals and Vice Principals receive must come from the resources within their existing contract. This led to a morale issue among principals and vice principals.

Note: On February 27, 2018, the contract was settled, with approval by the board at the February board meeting. In the end, the district did not insist that the cost of the salary increase come from the existing contract; however, recent communication suggests there is still tension as the CCPVPA feel that some of their expectations were not met, nor do they feel respected as a result of the entire protracted process.

Vision

Effective organizations often have a shared vision and/or a strategic plan that guides the direction of the organization, with most members of the organization having provided input into developing that shared vision. It has been over 12 years since SD27 has conducted a visioning exercise and those interviewed insist that it is absolutely essential to engage in a new process to give the district

direction. Many have stated that the district lacks direction and feels rudderless. The recently developed strategic plan has provided some guidance for district direction; however, it is missing key elements that a visioning process can provide, particularly related to culture and values.

Culture

As mentioned previously, the culture of the school district is not positive, nor is it described as a learning organization. It will take time to address this issue, through trust building, intentional actions, and focused attention on improving the culture. A shared plan to work toward improving the culture in the district will be required to keep a sustained focus on this issue.

Communication

It is a challenge to determine where the communications have gone wrong. Relationship issues have further exacerbated communication problems in SD27. Some of those involved do not appear to be accepting their role in creating these issues and are instead placing blame on others. This will require a sustained commitment from all parties, accepting the responsibility to make the necessary changes and contribute to improving the narrative about the school district.

CONCLUSIONS

Many of the concerns expressed in the CCTA vote of non-confidence stem from issues of respect, relationships, and trust. To address these concerns, long-term measures and actions will be required. Specifically, it will require a sustained focus on improving the culture in the district and building a sense of a community on behalf of the learners and staff in SD27.

It is imperative that the relationship, trust, and respect issues be dealt with to shift the focus and attention to creating an improved district culture through a shared vision, mission and values, leading to sustained improvement through short and long-term goals. In order to achieve long-term improvement for students and staff in the district, a commitment must be made by all members of the school district community to do what is necessary to address the areas of concern expressed during the interviews.

The following 12 recommendations will each require the district to develop a plan and create a process for implementation. As stated above, there must be a serious and sustained commitment by all members of the school district community to do what is necessary to address the issues identified,

and the plan to implement these recommendations will require input from the board, senior staff, school district leaders, and stakeholders.

Recommendations

1. Conduct a governance and policy review to clarify and delineate the operational and governance roles and responsibilities of the board and the staff. This would include the terms of reference, processes, and functions of committees.
2. Review and analyze the function and effectiveness of the dual CEO/CFO reporting roles in the district leadership organization.
3. Assess the work of the Superintendent including knowledge of the role of superintendent and building relationships with the field. Develop a Performance Review and Evaluation Plan with the Superintendent.
4. Assess the work of the Secretary-Treasurer, including knowledge of the role of Secretary-Treasurer, and knowledge of how to build positive working relationships with the field.
[REDACTED]
[REDACTED]
[REDACTED]. Develop a Performance Review and Evaluation Plan with the Secretary-Treasurer.
5. Engage in a visioning process, to create a shared vision, mission, and values. Include all district leaders, staff and school communities in the process. Align the district goals, resource allocation, and professional learning, with the goals that arise from the shared vision.
6. Develop a revised budget process that thoroughly engages the community, ensuring that when questions arise during the process they receive timely and respectful responses.
7. Conclude the contract with the CCPVPA, and do not include the LSR as part of the settlement of the contract. (As of February 27, 2018, the contract was settled, however, a debrief will be required to discuss the issues that arose during the process).
8. Develop and implement a leadership program to build leadership capacity in the district and engage the school and district leadership team in learning together as a community.

9. Engage an expert in culture building and restorative relationship building to do a thorough analysis of what can be done to address the issues that came from the CCTA vote of non-confidence as well as the feedback provided during interviews, to improve what those interviewed described as a district engulfed in mistrust, disrespect and low morale and to begin the hard work of creating a healthy organizational culture.
10. Engage the culture building and restorative relationship building expert to work on developing a respectful, professional relationship between the CCTA, senior staff, and the Board.
11. Engage a communications expert to assist the district with changing the narrative about SD27, and provide workshops for staff and trustees on effective and transparent communications within the district.
12. Analyze and address the concerns expressed about the ‘power triangle’.

Implementation of the Recommendations

The Cariboo-Chilcotin School District Board of Education has expressed the desire to work toward improving the issues identified, and should be afforded every opportunity to lead this change directly. To effectively implement the 12 recommendations a thorough plan will need to be developed. It is suggested that the district engage professional support to provide expertise with the overall plan, and within specific areas of the recommendations. Enlisting this type of support will provide both the expertise that is required immediately and it will create an opportunity for longer-term capacity building among district staff and the board. Ideally, the Board and senior district staff will fully embrace the need for improvement and be successful in this regard without further Ministry and/or external support.

Work should begin on the planning process immediately, recognizing that the implementation of some of the recommendations could begin during this school year, while others would begin early in the next school year.

Expert support identified in the recommendations:

- Organizational Culture Building and Restorative Mediation
- Governance and Policy Analysis
- Shared Vision Process
- Leadership Development
- Communications
- Budget Process – Engagement and Communication
- Leadership Assessment

In the event the Ministry considers escalating engagement with the district to successfully address all of the recommendations the following actions may be considered.

Ministry Assigned Plan

The Ministry of Education may direct specific actions to be taken, noting this could be done informally via correspondence or formally via an Administrative Directive exercised under the *School Act*. Ministry action could also include assigning people to work with the district to implement the recommendations. This could also include a more thorough analysis of the issues and continued follow up within the district to ensure that the plan and implementation occur.

The capacity to make the changes described in the recommendations may not exist to the degree necessary across the district; therefore, assigned experts would provide the opportunity for district staff and trustees to develop the capacity to address the issues, and to help the district establish practices that will make improvements regarding the concerns described in this report.

Capacity building would require all district leaders to be engaged in the process of district-wide improvement, on behalf of the learners in SD27, and would require a long-term commitment from the entire community to the process of improvement.

Special Advisor

At a later date, and only if needed, the Minister of Education could assign a Special Advisor if the district requires additional support and/or is not able to develop an effective plan to address the concerns and implement the 12 recommendations, or if the contracted or assigned experts are not able to assist the district with all of the recommendations.

The role of the Special Advisor would include overseeing the progress being made with respect to the recommendations within this report. The Special Advisor would report to the Minister of Education at regular intervals regarding that progress.