

Ministry of Education

**District School Board Ontario North
East
Follow-up Report to the Operational
Review**

December 2011

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1. Introduction

The Ministry has conducted Operational Reviews of the 72 district school boards across the province. The Ministry's goal is to enhance management capacity within school boards by encouraging good stewardship of public resources and by the leveraging and sharing of best practices. By identifying opportunities for continual improvement, school board administration and operations will be aligned to support the government's highest priority: student achievement.

In accordance with the stated objectives of the Operational Reviews, the Ministry has also engaged school boards to participate in a status and implementation update as part of the Operational Review cycle. Occurring approximately 12 months after the issuance of the final Operational Review report, the purpose of the update is to discuss with each school board the progress made in implementing the recommendations contained in the final report. It will also provide school boards with an opportunity to communicate to the Ministry their thoughts on the process, benefits that have been derived, and areas where some adjustments to the process would be beneficial.

As the recommendations vary between school boards, both in terms of quantity and scope, the following criteria were developed to help focus the review team, and the school board, on specific recommendations:

- Is the recommendation linked to the 12 Areas of Opportunity identified in the 2008 Sector Summary Report (seven) and the 2009 Sector Summary Report (five)?
- Does the recommendation represent a move toward more Strategic Planning on the part of Boards?
 - The departments that are responsible for the business functions perform significant activities in support of Student Success. The update should profile whether or not the school board is establishing links between the academic and non-academic functions through its strategic goals and priorities.
- Does the recommendation represent an area of potential risk to the board?
 - As an example, financial systems that are antiquated and require staff with very specialized knowledge could potentially disrupt the operations of the school board should those business skills be lost.
- Is the recommendation deemed to have positive Return on Investment?

- For example, implementation of an attendance management system may have greater potential for savings to the school board than introducing an electronic funds transfer system.
- Does the recommendation reflect updates to the Leading Practices?

For each of the selected recommendations, the school board was asked to provide the following information to the Operational Review team:

- Description of action(s) taken/not taken by the board to address recommendation(s).
- Supporting documentation
- If implemented, describe benefits derived, if possible, and date of implementation.

Details of the prioritization of the recommendations can be found in Appendix A of this report.

The scope of the follow up review also includes high-level consideration of whether the school board demonstrates adoption of those leading practices that were added to the fourth edition of the Operational Review Guide, released to the sector in September 2010. These were not part of the original review process.

2. Status and Implementation Update

Introduction

The District School Board Ontario North East Operational Review follow-up review took place on October 17, 2011, approximately 12 months after the release of the initial Operational Review report. The PricewaterhouseCoopers Operational Review team conducted a teleconference with senior administrators of the school board. In advance of the teleconference, the PricewaterhouseCoopers team selected several key recommendations from the Operational Review report and asked the board to provide an implementation status along with any related supporting material.

Summary of Recommendation Status

The school board has made some progress in implementing the recommendations since the completion of its original Operational Review in September 2010. Of particular note are the steps taken to implement an attendance support program, enhance the interim financial reporting processes and implement an automated work order management system.

There were 35 recommendations made in the original report. The Operational Review team focused on 17 of the recommendations in the follow-up review. The opportunities presented a cross section of strategic planning initiatives, some from 12 areas of opportunity identified in the sector reports as well as those that were of specific risks to the District School Board Ontario North East. The selected recommendations and the corresponding criteria are listed in Appendix A.

Overall, senior administration has fully implemented or has made some progress on most of the recommendations chosen for follow-up.

3. Governance and School Board Administration

#1 Succession and Talent Development

Operational Review Recommendation	Implementation Update
The school board should continue to align its leadership development programs and activities with the Ministry leadership initiatives. It should develop a formal Succession and Talent Development Plan in line with the Leadership Succession Planning and <i>Talent Development Ministry Expectations and Implementation Continuum</i> .	In Progress

#1 Succession and Talent Development

The school board has continued a number of initiatives that align its leadership development programs and activities with the Ministry’s leadership initiatives. For example, principals are provided with various opportunities to develop leadership opportunities and participate in Ministry training sessions.

The school board recognizes the need to continually nurture staff to take on leadership positions and has a number of initiatives to develop staff, such as literacy and math coach positions. Administrative staff also participate in various leadership events including the annual summer retreat, and the development of the Board Improvement Plan.

For succession planning, the school board maintains a basic flow chart depicting the key roles and responsibilities for leadership positions, and how these are to be back-filled.

The school board acknowledges the benefits of establishing a documented Succession and Talent Development Plan, but has yet to be able to dedicate resources to creating such a documented plan. The school board is encouraged to continue its efforts to align its leadership programs with the Ministry leadership initiatives.

4. Human Resource Management and School Staffing/Allocations

#1 Annual Operating Plan

Operational Review Recommendation	Implementation Update
The HR department's annual planning should build on the key priorities identified in the school board's strategic plan to create an annual departmental operating plan. The plan should reflect specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Implemented

#2 Performance Appraisal

Operational Review Recommendation	Implementation Update
The HR department should continue developing formal procedures for performance appraisal of all staff groups at the school board.	In Progress

#3 Attendance Support

Operational Review Recommendation	Implementation Update
Management should continue implementing a comprehensive attendance support program and developing a way to assess and report on the effectiveness of the attendance support process/programs to senior administration and the Board.	Implemented

#4 Pay Equity

Operational Review Recommendation	Implementation Update
The school board should finalize the review of pay equity plans for all staff groups.	In Progress

#5 Benefits Management

Operational Review Recommendation	Implementation Update
Management should conduct independent compliance audits of the school board's insurance carrier for the CUPE benefits plan to ensure adherence to the plan's terms and conditions.	Not Implemented

#6 Annual Staffing Plan

Operational Review Recommendation	Implementation Update
Management should document policies and procedures which govern the development of an annual staffing plan and allocation process.	In Progress

#1 Annual Operating Plan

The HR department has created an annual department operating plan, the *HR Growth Plan*. The document summarizes the key initiatives to be implemented by the HR department for the current school year. The plan was developed after reviewing the school board's strategic plan, and includes specific goals and targets to be tracked periodically throughout the year.

#2 Performance Appraisal

The school board has already implemented ministry guidelines for performance appraisal for education assistants, teachers and school principals. Draft performance appraisal guidelines are in place for a number of staff groups including head custodians, executive assistants, head school secretary and others. The draft guidelines will be presented to the school board's administrative council for review and approval later in 2011. The school board has not yet developed performance appraisal guidelines drafted for the custodian and early childhood educator staff groups, but plans to do so in the future.

#3 Attendance Support

The school board made significant progress in the area of attendance support. A formal attendance support program was rolled out in January 2011.

Prior to the formal roll out, the school board conducted extensive consultations with all stakeholder groups to ensure a high level of communication and support. A change management program was also implemented to help staff transition to the new program. The school board conducted feedback sessions with a number of administrators and supervisors responsible for the attendance support program. These sessions provided an opportunity for administrators and supervisors to provide useful feedback on the program.

The school board has engaged the services of an external consultant to assist in analyzing the attendance data collected over the first year of the program's existence. As this was the first year of full implementation of the program, key measurable metrics such as sick leave usage data for the full year will not be available until completion of

the first year of implementation (January 2012). Senior administration indicated that data will be analyzed after the first year of data has been compiled.

#4 Pay Equity Plan

Negotiations are ongoing to finalize the pay equity plans for the Education Assistant group. The matter is currently before the Pay Equity Tribunal. The school board indicated that it will continue to work with all stakeholder groups to resolve the issue.

#5 Benefits Management

The school board has not conducted an independent compliance audit of the school board's insurance carrier for the CUPE benefits plan to ensure adherence to the plan's terms and conditions. Senior administrators indicated that the CUPE group constitutes only a small portion of total benefit payments. The majority of benefit costs for all other staff groups are under a fixed contribution arrangement. As such, the costs required to conduct the audit just for the CUPE group could not be justified in the view of the school board.

#6 Annual Staffing Plan

The school board is currently working on documenting its policies and procedures which govern the development of its annual staffing plan and allocation process. The work is expected to be complete by June 2012. Senior administration indicated that existing procedures are well established and function well. There are multiple parties involved in creating the annual staffing and allocation plan, and management indicated that it will document the complex interactions and interdependencies among these parties.

5. Financial Management

#1 Annual Operating Plan

Operational Review Recommendation	Implementation Update
The Finance department's annual planning should build on the key priorities identified in the school board's strategic plan to create an annual departmental operating plan. The plan should reflect specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Implemented

#2 Budget Risk Management

Operational Review Recommendation	Implementation Update
Management should consider enhancing the process of reporting on the school board's budget risks using the format suggested in section 4.2 of this report. A formal risk management plan/report, which is reviewed and updated periodically, would include strategies to mitigate the risks of spending beyond budgeted levels.	Implemented

#3 Financial Reporting

Operational Review Recommendation	Implementation Update
Management should review the recommendations of the Interim Financial Reporting Committee (IFRC) and establish interim financial reporting that incorporates IFRC guidelines on frequency and format of reports. Management should also communicate the IFRC recommendations to the board of trustees, and request trustees' feedback on the recommended format of interim financial reports.	Implemented

#4 Internal Audit

Operational Review Recommendation	Implementation Update
Management should proceed with its intention to establish an internal audit function, giving consideration to the emerging Ministry direction to establish regional models for internal audit across the school board sector.	Implemented

#5 Audit Committee

Operational Review Recommendation	Implementation Update
Management should consider establishing an audit committee that includes external advisors in accordance with emerging Ministry direction.	Implemented

#1 Annual Operating Plan

The Finance department established its first annual operating plan in April 2010 (for the 2010-11 school year). The document summarizes the key initiatives to be implemented by the Finance department for the current school year. The plan was developed after reviewing the school board's strategic plan. The annual operating plan includes specific goals and targets to be tracked periodically throughout the year.

#2 Budget Risk Management

The Finance department worked closely with the Internal Audit function to establish an internal audit plan. The draft internal audit plan identifies and documents all significant risks during the budget planning process. Senior administration expects to continue to report on the progress of the budget risk mitigation plan throughout the school year and in upcoming years.

#3 Interim Financial Reporting

The Finance department revised the format of the interim financial reports to be completely consistent with the recommendations provided by the Interim Financial Reporting Committee (IFRC). The revised interim financial report includes all of the features of the recommended IFRC format. The new format has been fully implemented since February 2011.

#4 Internal Audit

The Board has established an internal audit function through its participation in the regional internal audit initiative. An internal audit plan is currently being developed. For next steps, internal audit will complete an entity-level risk assessment and will also initiate the process risk assessment.

#5 Audit Committee

The Board formally established an Audit Committee comprised of trustees and two external members in January 2011. The newly established Audit Committee has selected its chairperson, formally described the duties of the Audit Committee, met with the Board's external auditor and the regional internal audit team. The school board

reported that three applications were received for the two available openings on the committee.

6. School Operations and Facilities Management

#1 Green Clean Program

Operational Review Recommendation	Implementation Update
The school board should review the Ministry's Green Clean Program Resource Guide and use the guide to develop a formal green clean program as part of its overarching Education Environmental Policy.	In Progress

#2 Multi-year Maintenance Plan

Operational Review Recommendation	Implementation Update
Using a consultative process, management should develop a multi-year plan for major maintenance and renewal projects. The plan should address the board's preventative and deferred maintenance priorities and optimize the use of available funding (Annual Renewal Grant and Good Places to Learn funding). The plan should be approved by the Board.	In Progress

#3 Work Order Management

Operational Review Recommendation	Implementation Update
Management should continue examining options to implement an automated work-order system. An automated work order system would help management process records, monitor and evaluate projects, ensuring the effective use of resources. It would also provide useful information for planning of preventative maintenance.	Implemented

#4 Energy Management Plan

Operational Review Recommendation	Implementation Update
Using the results of the energy audits, the school board should establish a multi-year energy management plan that incorporates quantifiable measures and the tools to monitor and manage the plan. In line with the <i>Green Energy Act, 2009</i> , energy management planning should include the development of policies, guidelines, goals (conservation targets), and priorities for energy management and resource conservation. The plan should include short-term and long-term opportunities with milestones, roles, responsibilities and budgets with a process for ensuring community support.	In Progress

#5 Consolidated Billing

Operational Review Recommendation	Implementation Update
The school board should continue identifying opportunities for consolidated billing from utilities.	In Progress

#1 Green Clean Program

Work on this recommendation is in progress. Since the Operational Review, the Board has set up a Green Clean Working Committee comprised of principals, teachers, custodians and vendors to implement a formal Green Clean program. The Green Clean

Working Committee has reviewed the Ministry’s Green Clean Program Resource Guide, updated cleaning procedures and custodial manuals, and also required new cleaning supplies contracts to mandate green-certified products.

The school board has been working with its supplies to increase the proportion of green- certified cleaning products used in the school board. Wherever possible, green-certified products are preferred over conventional cleaning products. If green-certified products are not available, the school board has requested vendors to notify the school board as soon as green-certified replacements are available. These measures have resulted in increased usage of green-certified products.

#2 Multi-Year Maintenance Plan

The school board has established an annual plan that describes the priorities for preventative and deferred maintenance projects for the upcoming year. The annual plan also optimizes the use of available funding (for renewal and GPL). The plan is presented to the Board of Trustees annually. The school board has not yet established a longer- term, multi-year plan for major maintenance and renewal projects. The school board plans to develop a capital plan for the next two years.

The school board is encouraged to establish a multi-year maintenance plan that addresses the board’s preventative and deferred maintenance priorities over a three to five year timeframe. This plan will enable stakeholders to have a more transparent view over the school board’s major maintenance and renewal priorities over a longer timeframe.

#3 Work Order Management

Since the Operational Review the Facilities department has examined options to implement an automated work-order management system. After due diligence, the Facilities department selected a vendor and proceeded to implement the solution. An

online work-order system was successfully implemented as of December 2010. Users are able to submit work-order requests from any computer with an internet connection. This has resulted in minimal costs for software installations or hardware upgrades. The Facilities department reported that the system has been positively received by staff and has resulted in enhanced efficiencies and effectiveness.

#4 Energy Management Plan

The school board is working to implement this recommendation. The Board has developed policies, guidelines, goals and priorities with respect to energy management. Staff have also identified short- and long-term opportunities with milestones, roles, responsibilities and budgets. There is also a process for ensuring community support for the school board's energy conservation initiatives.

The Ministry's Utility Consumption Database used for tracking utility consumption is in place and analysis of data has begun in order to facilitate future development of targets in conjunction with the implementation of site-based conservation initiatives.

The school board is encouraged to continue with the development and implementation of a multi-year energy management plan and their various energy management and conservation initiatives. The energy management plan should incorporate quantifiable measures and the tools to monitor and manage the plan. In line with the *Green Energy Act, 2009*, energy management planning should include the development of policies, guidelines, goals (conservation targets), and priorities for energy management and resource conservation. The plan should include short-term and long-term opportunities with milestones, roles, responsibilities and budgets and a process for ensuring community support. The plan should be approved by the Board of Trustees and annual progress of the plan should also be reported to the Board of Trustees as well.

#5 Consolidated Billing

The school board has worked with utilities suppliers to increase the proportion of bills that are invoiced electronically and in a consolidated fashion. While some progress has been made, the school board has been constrained by local utilities that are not able to provide consolidated electronic data. The school board indicated that it will continue to push for increased adoption of consolidated data from its suppliers.

7. School Board Adoption of New Leading Practices

The following leading practices were added to the fourth edition of the Operational Review Guide that was released to the sector. Some of these leading practices are a result of the observations and learning from earlier waves of reviews.

School boards that were reviewed prior to September 2010 were not assessed against the new leading practices identified below. During this follow-up review process, the Operational Review team asked those school boards to comment on the extent to which they demonstrate adoption of these practices.

Governance and School Board Administration

New Leading Practice	Adopted?
The governance model reflects the roles and responsibilities mandated by the <i>Student Achievement and School Board Governance Act, Bill 177</i> .	No

The Board has made some progress to adopt a governance model that fully reflects the roles and responsibilities mandated by Bill 177. At present, there is delineation of roles and responsibilities between the Board of Trustees and senior administration, although in practice the delineation of roles and responsibilities requires occasional clarification.

The Board is encouraged to formally document its governance model such that it fully reflects the roles and responsibilities mandated by Bill 177.

HR Management and School Staffing/Allocation

New Leading Practice	Adopted?
Trustees do not sit on hiring panels (exception hiring the director of education) but provide policies to govern staffing and recruitment.	No
Processes are in place to identify and remove discriminatory biases and systemic barriers in staff recruitment, selection, hiring, mentoring, promotion and succession planning processes. The school board conducts employment system reviews and works towards broadening the diversity of recruitment pools.	Yes
Trustees provide the school board's policy and priority framework within which bargaining takes place.	Yes

While trustees provide general policy direction to govern the staffing and recruitment for most of the administration and school board's staff, they do participate on the hiring panels for the recruitment of the Director of Education as well as the hiring of Supervisory Officers and school principals.

The practice of trustees sitting on hiring panels is a long-standing tradition. However, in line with Bill 177, trustees should provide strategic policies to govern staffing and recruitment. They should not sit on hiring panels, with the exception of the hiring of the Director of Education. The Director of Education should review existing practices and the composition of interview panels, and develop formal hiring policies and procedures to clarify the roles of trustees and school board staff in hiring and recruitment.

The board has informal processes in place to identify and remove discriminatory biases and systemic barriers in staffing decisions. There is training on this topic to identify and remove discriminatory biases and systemic barriers in staff recruitment, selection, hiring, mentoring, promotion and succession planning processes. The board's current hiring and recruitment policies and practices also adhere to these principles.

The Board of Trustees participate in collective bargaining and engage in negotiations with unions. The Board should provide policy and a priority framework within which bargaining takes place, but refrain from engaging in bargaining directly.

Financial Management

New Leading Practice	Adopted?
The established policies and procedures that govern all aspects of supply chain management, including both planned (recurring) and unplanned (non-recurring/emergency purchases, comply with the Supply Chain Guideline (SCG) v.1.0.	Yes
In line with the SCG, purchasing authorization levels are commensurate to job roles and responsibilities, and are monitored for compliance by a supervisor or department head.	No

The school board is in compliance with SCG v1.0 and is prepared to make further amendments to its supply chain policies, procedures and processes to ensure compliance to the new Broader Public Sector (BPS) Procurement Directive, released in April 2011. The Finance department is currently reviewing the areas of procurement, expenses and student fees.

Senior administration reported that purchasing authorization levels commensurate to job roles and responsibilities are used in practice. However, these purchasing authorization levels have not been formally documented. The school board is currently in the process of hiring a new purchasing manager. Once the purchasing manager role has been established, the school board will make it a priority to document its purchasing authorization levels commensurate to job roles and responsibilities.

Operations and Facilities Management

New Leading Practice	Adopted?
The school board has an approved facility partnership policy.	No
A Project Manager is appointed to oversee all aspects of the project including monitoring the budget and project timelines and ensuring management processes are in place for issues such as change orders and other internal approvals. This includes periodic project status updates and post-construction project evaluation.	Yes
An independent Cost Consultant is retained by the school board to review the design, provide objective costing analysis and advice, and report to the school board on options to ensure that the proposed capital expenditure is within the approved budget, prior to tendering a project.	Yes

The school board has not developed an approved facility partnership policy. In line with the Ministry’s guidelines, the school board is encouraged to work with community partners in order to share facilities to the benefit of students and the community, and to optimize the use of public assets owned by the school board. The school board is encouraged to consult the Ministry’s guideline on facility partnerships. This guideline is intended to assist boards in establishing more facility partnerships with community partners, specifically in new and existing school facilities where students are being taught. Boards are expected to revise or develop their own facility partnership policies that are consistent with the guideline.

The Facilities department has a dedicated project manager to oversee major construction and maintenance projects. The role of the project manager is to be the single point of contact for individual, large-scale construction and maintenance projects. This individual is responsible for overseeing and monitoring the progress of the project, working with the architect and general contractor to ensure the on-time and on-budget delivery of each project.

The school board has retained the services of an independent cost consultant for school construction projects in the past and current projects as well. The decision of whether a cost consultant is retained depends on the size and complexity of the project. For major construction projects, the school board has engaged the services of cost consultants to obtain a third-party perspective on the financial proposals from vendors, and to track and monitor developments in the market.

Appendix A – Selection of Recommendations

- **SP** - Strategic Planning (SP)
- **AR** - Areas of Risk Categories
 - AR 1 - Undue reliance on specific human and / or non-human resources
 - AR 2 - Reputational risk in the community from not acting on the recommendation
 - AR 3 - Financial risk impacting school board’s financial position
- **ROI** - Potential for material Return on Investment
- **TAO** - Twelve Areas of Opportunity from 2008 sector report (seven) and the 2009 sector report (five)
- **NLP** – New leading practices introduced in Wave 5 through the Fourth Edition of the Operational Review Guide.

Governance and School Board Administration

Ref.	Recommendation	Follow-up Yes/No	Criteria
1.	The school board should continue to align its leadership development programs and activities with the Ministry leadership initiatives. It should develop a formal Succession and Talent Development Plan in line with the Leadership Succession Planning and <i>Talent Development Ministry Expectations and Implementation Continuum</i> .	Y	TAO

HR Management and School Staffing/Allocation

Ref.	Recommendation	Follow-up Yes/No	Criteria
2.	The HR department’s annual planning should build on the key priorities identified in the school board’s strategic plan to create an annual departmental operating plan. The plan should reflect specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Y	SP
3.	The HR department should continue developing formal procedures for performance appraisal of all staff groups at the school board.	Y	TAO

Ref.	Recommendation	Follow-up Yes/No	Criteria
4.	Management should continue implementing a comprehensive attendance support program and developing a way to assess and report on the effectiveness of the attendance support process/programs to senior administration and the Board.	Y	TAO
5.	The school board should finalize the review of pay equity plans for all staff groups.	Y	AR3
6.	Management should conduct independent compliance audits of the school board's insurance carrier for the CUPE benefits plan to ensure adherence to the plan's terms and conditions.	Y	TAO
7.	Management should document policies and procedures which govern the development of an annual staffing plan and allocation process.	Y	NLP

Financial Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
8.	The Finance department's annual planning should build on the key priorities identified in the school board's strategic plan to create an annual departmental operating plan. The plan should reflect specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Y	SP
9.	Management should consider enhancing the process of reporting on the school board's budget risks using the format suggested in section 4.2 of this report. A formal risk management plan/report, which is reviewed and updated periodically, would include strategies to mitigate the risks of spending beyond budgeted levels.	Y	TAO
10.	Management should review the recommendations of the Interim Financial Reporting Committee (IFRC) and establish interim financial reporting that incorporates IFRC guidelines on frequency and format of reports. Management should also communicate the IFRC recommendations to the board of trustees, and request trustees' feedback on the recommended format of interim financial reports.	Y	TAO
11.	Management should proceed with its intention to establish an internal audit function, giving consideration to the emerging Ministry direction to establish regional models for internal audit across the school board sector.	Y	TAO
12.	Management should consider establishing an audit committee that includes external advisors in accordance with emerging Ministry direction.	Y	TAO

School Operations and Facilities Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
13.	The school board should review the Ministry's Green Clean Program Resource Guide and use the guide to develop a formal green clean program as part of its overarching Education Environmental Policy.	Y	NLP
14.	Using a consultative process, management should develop a multi- year plan for major maintenance and renewal projects. The plan should address the board's preventative and deferred maintenance priorities and optimize the use of available funding (Annual Renewal Grant and Good Places to Learn funding). The plan should be approved by the Board.	Y	TAO
15.	Management should continue examining options to implement an automated work-order system. An automated work-order system would help management process records, monitor and evaluate projects, ensuring the effective use of resources. It would also provide useful information for planning of preventative maintenance.	Y	ROI
16.	Using the results of the energy audits, the school board should establish a multi-year energy management plan that incorporates quantifiable measures and the tools to monitor and manage the plan. In line with the <i>Green Energy Act, 2009</i> , energy management planning should include the development of policies, guidelines, goals (conservation targets), and priorities for energy management and resource conservation. The plan should include short-term and long- term opportunities with milestones, roles, responsibilities and budgets with a process for ensuring community support.	Y	TAO
17.	The school board should continue identifying opportunities for consolidated billing from utilities.	Y	NLP