

# **Guide for Education Planning and Results Reporting**

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Requirements for Alberta school jurisdictions (public, separate and Francophone school authorities) and their schools

February 2008



Guide for Education Planning 2008-2011 and Results Reporting November 2008<sup>©</sup>

*Requirements for Alberta school boards and francophone school authorities and their schools.*

***This document is online at <http://education.alberta.ca/admin/resources/planning.aspx> and provides the requirements for:***

- Jurisdiction and school three-year education plans for 2008-2011. These plans cover the 2008/09, 2009/10 and 2010/11 school years. [The due date for jurisdiction plans has been extended to June 20, 2008.](#)
- Jurisdiction and school Annual Education Results Reports on the 2007/08 school year, based on the three-year education plans for 2007-2010. Jurisdiction reports are due on November 30, 2008.

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# **Education Planning 2008-2011 and Results Reporting November 2008**

Requirements for Alberta school boards and Francophone school authorities and their schools

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## What's changed?

	Page
Some text has been reformatted in bullet form for readability. Key changes and clarifications are highlighted in the text.	
<ul style="list-style-type: none"><li>• Jurisdiction three-year education plans for 2008/09 to 2010/11 are due June 20, 2008.</li></ul>	2-3 & 2-7
<ul style="list-style-type: none"><li>• School boards are to indicate in their three-year plans and AERRs how they have addressed their obligations under Section 13 of the School Councils Regulation (updated 2007).</li></ul>	2-7, 3-2 & 3-6
<ul style="list-style-type: none"><li>• Clarified that jurisdiction and school three-year education plans are updated each year by adjusting strategies and targets, rolling the plan forward a year. A completely new three-year plan is not expected each year.</li></ul>	2-1 & 2-7
<ul style="list-style-type: none"><li>• Simplified the presentation of measures in the Education Plan section.</li></ul>	2-4
<ul style="list-style-type: none"><li>• Clarified that additional measurement information may be provided in the education plan at the jurisdiction's discretion.</li></ul>	2-4 to 2-5
<ul style="list-style-type: none"><li>• As a result of discussions with stakeholders over the last year, the Accountability Pillar post-secondary transition measure has been changed to the six-year rate from the four-year rate. This change will be reflected in the May 2008 Accountability Pillar evaluations.</li></ul>	2-6, 3-5
<ul style="list-style-type: none"><li>• A note has been added to the measures table in the Education Plan section to clarify that additional information on some measures is required to be reported in the AERR.</li></ul>	2-6
<ul style="list-style-type: none"><li>• Include the web address of the three-year education plan and the AERR within the document (both print and posted versions) for ease of reference.</li></ul>	2-7 & 3-6
<ul style="list-style-type: none"><li>• School plans and reports are to include overall parent, student and teacher aggregated results on Accountability Pillar survey measures</li></ul>	2-7 & 3-7
<ul style="list-style-type: none"><li>• Clarified that the reference to information on school generated funds is found in Schedules as well as the jurisdiction's Audited Financial Statements.</li></ul>	3-5
<ul style="list-style-type: none"><li>• Added an alternate sample plan format to Appendix A that simplifies the presentation of measures information.</li></ul>	Sample 2, pages 12-22

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## Background

Section 16(2) of the *Government Accountability Act* requires organizations under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year “in the form and at a time acceptable to the Minister.” Section 78 of the *School Act* requires school boards to use accountability information and report it to students, parents and electors in a manner the Minister prescribes.

School jurisdiction plans and reports align with and build on Alberta Education’s vision, mission, goals and outcomes for the basic education system. In this way, these documents help ensure that the Kindergarten to Grade 12 education system is focused on a common purpose and direction to meet the educational needs of Alberta students. At the same time, jurisdiction plans and reports incorporate local goals, priorities and outcomes that reflect the unique characteristics and circumstances of their communities. In short, they reflect local needs and priorities within the context of a province-wide framework.

### Accountability Framework for the K-12 Education System

Accountability in the basic education system involves an ongoing performance management cycle that enables continuous improvement and critical reflection. Key components are measuring progress and using results to inform decision making. For school jurisdictions and their schools, the cycle consists of:

- developing/updating plans that are aligned with provincial goals and outcomes and incorporating community input
- preparing budgets that allocate resources to achieve goals and improve results
- implementing strategies to improve student learning,
- monitoring and adjusting as needed

- measuring, analyzing and reporting results
- using results to identify areas for improvement and develop strategies for the next plan, i.e., evidence-based decision making
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, and Alberta Education) about school jurisdiction and school plans and results.

### Performance Management Cycle for School Authority Accountability



### Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework for school jurisdictions, which is based on three Pillars: Flexibility, Accountability and Funding, and has the following fundamental characteristics:

- equitable distribution of funds
- increased flexibility in use of funds to facilitate local decision making
- public accountability for use of resources and results achieved.

The Accountability Pillar places increased emphasis on achieving outcomes, reporting results and using results for informed decision making for the purpose of improving programs and student results in subsequent years. School jurisdiction performance is measured, evaluated and reported by comparing current results against both past performance and provincial standards on a common set of measures for all jurisdictions, using a common evaluation methodology.

School boards continue to be accountable for meeting the learning needs of all students and ensuring that provincial legislation, regulations, policies and standards are met.

The Accountability Pillar enhances the use of measurement in performance management of school jurisdictions. It includes:

- a concise set of performance measures that addresses outcomes of importance to parents and the public (see page 2-6 for a complete list of performance measures, organized by goal, outcome and category)
- results of consistent surveys of parents, students and teachers, administered annually by Alberta Education
- standard methodology to evaluate results
- consistent, accessible data reports to jurisdictions for use in jurisdiction and school planning and reporting.

### Accountability Pillar Evaluation Methodology

Each measure within the set of Accountability Pillar measures is evaluated on two bases: achievement and improvement, then given an overall evaluation that combines the achievement and improvement evaluations. Four years of results are used to evaluate a measure.

The **achievement** evaluation compares the current jurisdiction result against fixed standards for each measure, which are set by selecting the 5th, 25th, 75th and 95th percentiles on the distribution of all jurisdictions' baseline three-year average results. These standards are held constant for seven to ten years. The comparison of the current result to the standards results in one of the following achievement levels:

- Very high (blue) for results at or above the 95th percentile
- High (green) for results between the 75th and 95th percentiles

- Intermediate (yellow) for results between the 25th and 75th percentiles
- Low (orange) for results between the 5th and 25th percentiles
- Very low (red) for results below the 5th percentile.

**Note:** The Achievement Evaluation Table in the Measure Evaluation Reference section of the jurisdiction’s Accountability Pillar Overall Summary report contains the range of values for each standard for each measure.

The **improvement** evaluation compares the current jurisdiction result with the jurisdiction prior three-year average result for each measure, using a statistical test to determine the extent of change. This results in one of the following improvement levels:

- Improved significantly (blue)
- Improved (green)
- Maintained (yellow)
- Declined (orange)
- Declined significantly (red)

The evaluations of improvement and achievement are combined for the **overall** evaluation for the measure, resulting in one of the following overall evaluations for the measure:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

The table below indicates how the achievement and improvement evaluations are combined to arrive at an overall evaluation for each measure.

Improvement	Achievement				
	Very High	High	Intermediate	Low	Very Low
Improved Significantly	Excellent	Good	Good	Good	Acceptable
Improved	Excellent	Good	Good	Acceptable	Issue
Maintained	Excellent	Good	Acceptable	Issue	Issue
Declined	Good	Acceptable	Issue	Issue	Concern
Declined Significantly	Acceptable	Issue	Issue	Concern	Concern

Similarly, each of the seven categories of measures is given an evaluation that is based on an average of the overall evaluation for each measure within the category. This results in one of the following category evaluations:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

Example of measure and category evaluations:

Category	Measure	Evaluations			Category
		Achievement	Improvement	Overall	
Student Learning Achievement (Grades 10 – 12)	Diploma: Acceptable	High	Maintained	Good	Acceptable
	Diploma: Excellence	Intermediate	Declined	Issue	
	Diploma Exam Participation Rate (4+ Exams)	Intermediate	Maintained	Acceptable	
	Rutherford Scholarship Eligibility Rate	High	Improved	Good	

## Accountability Pillar Results and Evaluations for Jurisdictions

Alberta Education collects data, calculates and provides five years of results, prior three-year averages and evaluations for the Accountability Pillar measures and categories to school jurisdictions twice a year. The early May results are provided for jurisdictions to use in preparing the three-year plan. The update is provided in early October, when the new year of achievement test and diploma exam results are available, for reporting in the AERR.

A complete set of evaluations for all Accountability Pillar measures and categories was provided for the first time to each school jurisdiction in May 2007 when four years of survey results became available.

School-level evaluations were calculated and provided to school jurisdictions for the first time in June 2007. These provide additional information to assist jurisdictions and schools address results and improve programs for students.

## Jurisdiction and Alberta Education Review and Follow-up

The evaluation of the Accountability Pillar measures provides a consistent and transparent framework for interpreting results and helps jurisdictions identify areas needing improvement.

The results and evaluations of Accountability Pillar measures provide information on jurisdiction performance and trends over time. Jurisdictions are responsible for:

- applying their expertise in data and program analysis as well as their knowledge of local conditions (context) to develop an understanding of the results
- working with their schools to determine how best to bring about improvement.

All jurisdictions are required to address Accountability Pillar results in their three-year education plans by including improvement strategies. For any measure with an overall evaluation of “Issue” or “Concern,” jurisdictions are required to:

- include and clearly identify (e.g., highlight) strategies in their three-year education plans that will improve results over time, taking into account the factors affecting performance based on data and contextual analysis
- set incremental targets for each year of the plan for measures that have an overall evaluation of “Issue” or “Concern.”

For any measure with two or more years of low or declining results based on the May Accountability Pillar evaluations (i.e., those with a current evaluation of “Concern” in May 2008 and an evaluation of “Issue” or “Concern” in May 2007), jurisdictions also must:

- develop specific Action Plans designed to improve these results and achieve targets
- have these Action Plans ready for implementation by the start of the next school year.

Alberta Education staff continue to meet with jurisdiction staff twice a year – in the fall to review jurisdiction three-year education plans and in the winter to review AERRs. These reviews include:

- looking at Accountability Pillar measure results and evaluations
- discussing the jurisdiction’s efforts to maintain good results and to improve results where needed, with priority on measures that drop to or remain at the “Issue” or “Concern” level based on the May Accountability Pillar evaluations.

See Appendix D for information on the development of the Accountability Pillar.

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# Education Plans for School Jurisdictions, 2008 – 2011

## An Overview of the Process

### Preparing/Updating Education Plans

The planning component of the performance management cycle involves:

- updating three-year education plans annually in keeping with provincial direction for the K – 12 education system
- developing the budget to support the plan.

Updated jurisdiction plans maintain a three-year time frame – as one year is completed another is added, rolling the plan forward. At the same time:

- strategies and targets are adjusted based on performance over time, the Accountability Pillar evaluation, and local factors such as changes in jurisdiction priorities and the operating environment (context)
- the budget is developed to implement the first year of the plan and to position the jurisdiction for future years.

This approach to planning allows jurisdictions to be responsive to student and community needs and to focus on continuous improvement while maintaining continuity from year to year and consistency with provincial direction.

The school board is ultimately accountable for and approves the jurisdiction three-year education plan. The elected board provides overall direction for the education plan. In consultation with parents, jurisdiction and school staff and other stakeholders in their community, the jurisdiction administration develops a planning and budgeting process that meets jurisdiction needs and is responsible for preparing the content of the plan and the budget to resource the plan for approval by the board.

In response to jurisdiction requests, two **optional** formats are provided in Appendix A that includes all the required elements of the jurisdiction plan.

These formats also are posted on the Internet in Word for school jurisdictions to download and use if they wish. If the jurisdiction chooses to use a format of its own design, the sample formats can be used as a checklist to ensure all requirements are included.

Schools develop and implement three-year education plans aligned with jurisdiction and provincial direction. Education plans for schools are developed/updated by school administrators and teaching staff, in consultation with school councils and jurisdiction staff.

## Considerations in Updating Education Plans

School jurisdictions and schools update their three-year education plans each year. Annual updates take the following considerations into account:

- Jurisdiction and school results and evaluations of Accountability Pillar measures and categories
- Input from stakeholders such as school councils, students, parents and the public
- Available resources
- Alberta Education's three-year business plan and provincial performance results and trends
- Feedback from Alberta Education.

Entirely new plans are prepared infrequently. However, components such as strategies and targets are reviewed each year, while components such as the vision, mission and beliefs (foundation statements) are revisited and refreshed on an occasional basis. Such reviews are particularly appropriate when a new board begins its term.

## Communicating Education Plans

**Three-year education plans are public documents.** School jurisdictions are required to post their plans on their websites, including subsequent amendments or updates. They are also encouraged to use a variety of methods to communicate their plans and their achievements to the broader community, such as newspaper inserts, brochures and community meetings.

## Education Plan Due Date

Three-year education plans for school jurisdictions are due by May 31 each year **(extended to June 20, 2008 for the 2008 – 2011 plan)**. School jurisdictions post their updated three-year plans on their websites by the due date and send an email to the respective Zone Director

advising that the plan has been posted to the jurisdiction's website along with the web link to the plan. If plans are revised after the initial notification, advise the Zone Director by email of the changes and the posting of the revised plan.

## Reviewing Education Plans

Alberta Education staff review three-year education plans and discuss them with superintendents to:

- enhance the department's understanding of the jurisdiction's context
- encourage jurisdiction improvement efforts
- monitor compliance with provincial requirements
- identify implications for provincial planning.

## Components and Requirements of Three-Year Education Plans 2008 – 2011

[Components are required unless identified as optional. Components are defined in Appendix C, pages 27-28. **Two optional formats** are provided in Appendix A and posted as Word documents on the Ministry's website that jurisdictions can use in preparing their three-year plans.]

- Message from board chair** (optional)
- An **accountability statement**, worded as follows:

The Education Plan for (name of jurisdiction) for the three years commencing September 1, (year) was prepared under the direction of the Board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. This Education Plan was developed in the context of the provincial government's business and fiscal plans. The Board is committed to achieving the results laid out in this plan.
- Foundation Statements** (optional). Vision, mission, principles and beliefs.
- A Profile of the Jurisdiction** (optional).
- Trends and issues** (optional).
- Provincial goals, related outcomes, performance measures, targets and strategies**. Include:
  - the one-page evaluation of jurisdiction results from the May 2008 Accountability Pillar Overall Summary report provided by Alberta

Education, which contains the evaluation for each measure and category, and the required goals, outcomes and performance measures (see list on page 2-6).

For each required outcome, include:

- the measures used to assess progress and achievement of the outcome (see list on page 2-6)
- reference to the results and evaluation for the measures on the summary sheet
- jurisdiction targets for each year of the plan for measures with an overall evaluation of “Issue” or “Concern.”

These targets must reflect reasonable progress toward or moving into the next higher achievement standard, as defined by the evaluation methodology, over the plan period. For example, if the jurisdiction result is more than 10 percentage points below the next higher achievement standard, it may not be possible to move into that higher standard in three years, but it would be possible to achieve results that are closer to the next standard. Refer to the Achievement Evaluation Table included in the Accountability Pillar Overall Summary report on the Extranet for the range of results that are included in each achievement of standard.

**Notes:**

- As gains are made toward or into the next achievement standard, the improvement evaluation will reflect this progress with an evaluation of “Maintained” or higher.
- While useful, especially for Accountability Pillar measures, targets are not required except for the Accountability Pillar measures with an overall evaluation of “Issue” or “Concern.”

Jurisdictions are encouraged to include additional results or contextual information to help explain strategies and targets to parents and the public, such as:

- achievement test or diploma exam results for specific grades and subjects
- five-year high school completion rates
- Accountability Pillar survey results for a particular respondent group.

Local strategies (at least one strategy for each outcome in the plan), including strategies in all jurisdiction education plans that:

- address learning needs and achievement of outcomes for all students
  - reflect local context and needs of specific student populations (Note: including strategies for students with special needs satisfies the planning component of 14.a of the *Standards for Special Education* (amended June 2004)  
[http://www.education.gov.ab.ca/k\\_12/specialneeds](http://www.education.gov.ab.ca/k_12/specialneeds))
  - are designed to improve jurisdiction selected Accountability Pillar results. **Jurisdictions with an overall evaluation of “Issue” or “Concern” based on the evaluation of Accountability Pillar results are required to clearly identify (e.g., highlight) their strategies for improving results for those measures.**
- **Budget Highlights.** This section presents highlights from the board’s budget for the first year of the three-year plan in a way that is easily understood, transparent and meaningful to parents and the public. Budget highlights must provide key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus to address Accountability Pillar results. This section may refer to budgeted changes in enrolment, certificated and non-certificated staff, programs, funding, revenues and expenses, annual surpluses or deficits and accumulated surpluses. This section must include:
- guiding principles the board uses in financial planning
  - charts/tables that summarize information from the board’s budget
  - a web link to the jurisdiction’s Budget Report Form.
- **Highlights of facility and capital plans.** Include:
- A brief description of major school renewal or construction projects underway or planned over the next three years (if applicable) and their benefit to students (*which students, programs, schools*).
  - A web link to more detailed information on the jurisdiction’s facility and capital plans.

## Required Goals, Outcomes, Performance Measures and Targets

Listed below are all the required goals, outcomes and performance measures for school jurisdiction three-year education plans for 2008/09 to 2010/11. Targets for each year of the plan are required for Accountability Pillar measures with an overall evaluation of “Issue” or “Concern.” Measures that are not part of the Accountability Pillar are shaded.

Categories	Goals, Outcomes and Performance Measures
<b>Safe and Caring Schools</b>	<p><b>Goal One: High Quality Learning Opportunities for All</b>  <b>Outcome: Schools provide a safe and caring environment.</b></p> <ul style="list-style-type: none"> <li>Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others and are treated fairly at school.</li> </ul>
<b>Student Learning Opportunities</b>	<p><b>Outcome: The education system meets the needs of all K-12 students, society and the economy.</b></p> <ul style="list-style-type: none"> <li>Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.</li> <li>Overall teacher, parent and student satisfaction with the overall quality of basic education.</li> <li>Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community.</li> </ul> <p><b>Outcome: Children and youth at risk have their needs addressed through effective programs and supports.</b></p> <ul style="list-style-type: none"> <li>Annual dropout rate of students aged 14 to 18.</li> </ul> <p><b>Outcome: Students complete programs.</b></p> <ul style="list-style-type: none"> <li>High school completion rate of students within three years of entering Grade 10.</li> </ul>
<b>Student Learning Achievement, K-9</b>	<p><b>Goal Two: Excellence in Student Learning Outcomes</b>  <b>Outcome: Students demonstrate high standards in learner outcomes.</b></p> <ul style="list-style-type: none"> <li>Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard, and the percentage who achieved the standard of excellence on Provincial Achievement Tests (overall cohort results).</li> </ul>
<b>Student Learning Achievement, 10-12</b>	<ul style="list-style-type: none"> <li>Overall percentage of students who achieved the acceptable standard, and overall percentage of students who achieved the standard of excellence on diploma examinations (overall results).</li> <li>Percentage of students writing four or more diploma exams within three years of entering Grade 10.</li> <li>Percentage of Grade 12 students eligible for a Rutherford Scholarship.</li> </ul>
<b>Preparation for Life Long Learning, Employment, and Citizenship</b>	<p><b>Outcome: Students are well prepared for lifelong learning.</b></p> <ul style="list-style-type: none"> <li>High school to post-secondary transition rate of students within <b>six</b> years of entering Grade 10.</li> </ul> <p><b>Outcome: Students are well prepared for employment.</b></p> <ul style="list-style-type: none"> <li>Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school.</li> </ul> <p><b>Outcome: Students model the characteristics of active citizenship.</b></p> <ul style="list-style-type: none"> <li>Overall teacher, parent and student agreement that students model the characteristics of active citizenship.</li> </ul>
<b>Involvement</b>	<p><b>Goal Three: Highly Responsive and Responsible Jurisdiction</b>  <b>Outcome: The education system at all levels demonstrates effective working relationships.</b></p> <ul style="list-style-type: none"> <li>Overall teacher and parent satisfaction with parental involvement in decisions about their child’s education.</li> </ul>
<b>Continuous Improvement</b>	<p><b>Outcome: The jurisdiction demonstrates leadership and continuous improvement.</b></p> <ul style="list-style-type: none"> <li>Overall percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years (<i>clarified wording</i>).</li> <li>Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.</li> </ul>

**Notes:**

- The results for these measures are available in the Accountability Pillar reports on Alberta Educations Extranet.
- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- In the AERR, jurisdictions are required to report additional results for high school completion (four- and five-year rates), provincial achievement tests (each subject and grade), diploma examinations (each subject) and post-secondary transition (four-year rates). See pages 3-4 to 3-5.
- See Appendix B for a brief definition of each performance measure.

- ❑ **Publication and Communication.** School jurisdictions must post their updated education plans on their websites by May 31<sup>st</sup> (extended to June 20, 2008 for the 2008-2011 plan), and include the following additional information:
  - indicate how the plan was or will be communicated to parents and the public
  - indicate what the board has done to meet its obligations under Section 13 of the School Councils Regulation (Alberta Regulation 113/2007) to provide opportunity for school councils to be involved in updating school plans.
  - include the web link to the jurisdiction three-year education plan in both the print and posted versions of the document.

### Requirements for School Education Plans 2008 – 2011

A school's education plan reflects and is aligned with the jurisdiction's three-year plan. Each jurisdiction outlines its own requirements for the content and format for school education plans. In addition, the provincial goals and measures are required in school plans to reflect provincial direction for education. Alberta Education does not routinely collect or review individual school plans. It is the responsibility of school jurisdictions to ensure the following:

- Each school updates its three-year education plan annually by adjusting strategies and targets, rolling the plan forward one year. School plans must identify goals, strategies and performance measures.
- Specifically, school plans must include:
  - the goals of the Alberta Education business plan
  - strategies for achieving the goals
  - the required measures listed on page 2-6, along with the most recent school, jurisdiction and provincial results as applicable (e.g., high schools would not include PAT results)

**Note:**

- Targets are useful for measures where results over time are available, but are not required.
- new this year is the requirement to include aggregated parent, student and teacher results on the Accountability Pillar survey measures for which sufficient data is available.

In addition:

- Indicate how the school council was involved in updating the school's three-year plan.

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## Results Report for 2007/08 (November 2008)

### An Overview of the Process

#### Preparing Results Reports

Each year, school jurisdictions measure and interpret their performance and report on their progress toward achieving the goals and outcomes of their three-year education plans in their Annual Education Results Report (AERR). This includes measuring and reporting on local measures as well as reporting and responding to the measurement information and evaluations received from Alberta Education. The Accountability Pillar performance measure results and evaluations are a primary source of information for assessing and reporting on performance, and are used along with other jurisdiction results and contextual information to determine where improvements are needed.

The AERR is prepared under the direction of the board, using a process determined by jurisdiction staff. The report is approved by the elected board or francophone authority and informs stakeholders where the jurisdiction is in relation to where it wants to be in achieving its goals and outcomes. It demonstrates that the school board is accountable for results and for the wise use of resources to provide quality programs for students and to address areas for improvements. AERRs provide jurisdictions and schools with the opportunity to summarize their accomplishments, in addition to reporting on performance.

**Note:** An optional format for the AERR is under development and will be posted when available. Superintendents will be notified of the posting.

In preparing their results reports, school jurisdictions compile and assess jurisdiction results and evaluations that pertain to the performance measures identified in their three-year education plans, taking into account provincial results, trends and context (see Alberta Education's 2007/08 Annual Report published September 2008 for provincial context), as well as local context. Jurisdiction results come from:

- Alberta Education, which provides results and evaluations on the Extranet for the required measures, as follows:
  - Accountability Pillar surveys of students, parents and teachers.
  - Results from provincial achievement tests and diploma examinations.
  - High school completion rates, dropout rates, diploma examination participation rates, high school to post-secondary transition rates and Rutherford Scholarship eligibility rates.
- Local sources (schools and jurisdictions) including locally developed surveys\* used to collect information for optional local performance measures.

### Reporting-Related Communications

**Annual education results reports (AERRs) are public documents.**

School jurisdictions **are required to** post their AERRs on their websites and to include the web link to the site in the AERR (print and posted versions).

Jurisdictions are encouraged to use tools such as newspaper inserts, brochures and community meetings to make the information more broadly accessible to parents and the public. Information that is summarized for public distribution must include results for all performance measures reported in the jurisdiction's AERR.

A school jurisdiction's AERR **must** identify:

- how the report was or will be communicated to the public
- how the annual results reports prepared by schools in the jurisdiction are communicated to parents and to the community, and include web links to school websites and school results reports
- how school results and interpretation of Accountability Pillar measures are communicated to school councils.

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\* To support school jurisdictions in their local efforts to survey stakeholders, Alberta Education prepared a useful handbook, *How to Conduct Satisfaction Surveys: A Practical Guide to Conducting Surveys within Alberta's Education System*. The handbook can be downloaded from the department's website: [http://education.alberta.ca/media/443322/SatisfactionSurveyGuide\\_2005.pdf](http://education.alberta.ca/media/443322/SatisfactionSurveyGuide_2005.pdf).

## Results Report Due Date

School jurisdictions post their AERR by the **due date of November 30** and notify Alberta Education by sending an email to the respective Zone Director:

- advising that the report has been posted to the jurisdiction's website
- providing the web link to the report. If the report is revised following the initial notification, inform your Zone Director of the changes and re-posting.

## Reviewing Annual Education Results Reports

Alberta Education staff review school jurisdictions' AERRs to:

- enhance the department's understanding of jurisdiction results
- determine whether implications of results for the next update of the jurisdiction plan have been considered, e.g. how shortfalls in performance will be addressed
- monitor compliance with provincial requirements
- ensure consistency with the related education plan
- encourage jurisdiction results reporting and improvement efforts
- identify implications for the department's planning.

## Components and Requirements for the November 2008 AERR

The November 2008 Annual Education Results Report reports on the jurisdiction's three-year education plan for 2007-2010 and includes the components listed below (revisions since the March 2007 guide are highlighted). A template for the AERR is under development and will be provided to jurisdictions when available.

A **message** from the board chair (optional).

An **accountability statement**, worded as follows:

The annual education results report for **(name of jurisdiction)** the **(year)** school year was prepared under the direction of the board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. The board is committed to using the results in this report, to the best of our abilities, to improve the outcomes for students in our jurisdiction. We will use the results to

develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.

- ❑ Information on how the report was or will be communicated to parents and the public.
- ❑ Information on how the results reports prepared by schools in the jurisdiction were communicated to parents and to the community.
- ❑ The Accountability Pillar Overall Summary report provided by Alberta Education in October 2008.
- ❑ Highlights for the previous year, including:
  - the jurisdiction’s **accomplishments** (impact of major activities/strategies), including programs and achievement of specific groups of students. (Note: reporting on programs, services and results for students with special needs satisfies the non-financial reporting component of Section 14.a and c of the *Standards for Special Education* (June 2004) [http://www.education.gov.ab.ca/k\\_12/specialneeds](http://www.education.gov.ab.ca/k_12/specialneeds).)
  - web links to the jurisdiction’s AISI project(s) annual report(s) and class size report.
- ❑ Report the jurisdiction’s **performance measure results** from the jurisdiction’s education plans for 2007/08 – 2009/10 in relation to the goals, outcomes and targets for 2007/08 in the three-year plan (see page 2-6 for list of required measures). Specifically, for each required measure, report:
  - five years of jurisdiction and provincial results (or available results if less than five years)
  - most recent result in relation to the target for 2007/08 (if applicable)
  - progress toward the improvement target set for 2008/09 for Accountability Pillar measures with an evaluation of “Issue” or “Concern” in May 2006
  - comment on results, such as contextual information, factors affecting performance and analysis of results; if results on Accountability Pillar measures have an improvement evaluation of “Improved” or “Improved significantly,” identify the strategies or

action taken by the jurisdiction (or schools) that may have contributed to this improvement.

In addition, report five years of jurisdiction and provincial results for:

- acceptable and excellence overall results and results for each grade and subject for provincial achievement tests and diploma examinations
- four and five-year rates for high school completion
- four-year rates for post-secondary transition.

**Notes:**

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- For Accountability Pillar survey measures, results from the Accountability Pillar Survey, rather than the jurisdiction's own surveys, must be reported. Jurisdiction survey results may be used to report on local measures.

Identify **future challenges**, including areas for improvement and how the jurisdiction will address these.

**Summary of Financial Results**

- provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus and capital reserves
- include program expenditure information in a table or graph format for the primary audience – parents and other members of the community
- indicate where more information on the jurisdiction's sources of school generated funds and their uses can be obtained (e.g. web link to the Audited Financial Statements **and related schedules**, contact at central office) and that comparative information is available in a provincial report – provide the web link to the provincial roll up of jurisdiction AFS information:  
<http://education.alberta.ca/admin/funding/audited.aspx>
- provide a web link to the jurisdiction's Audited Financial Statements and related schedules for 2007/08.

**□ Capital and Facilities Projects**

- highlight, for parents and the public, progress on major school facilities projects, i.e., building renewal and construction for the previous school year, as applicable, focusing on benefits to students, e.g., improved accommodation of students, enhanced learning opportunities [*which students, programs, schools*].

**□ Publication and Communication:** School jurisdictions must post their AERR for 2007/08 on the jurisdiction website by November 30, 2008 and notify the Zone Director. The AERR also must include the following information:

- how the annual results reports prepared by schools in the jurisdiction are communicated to parents and the public
- how the board met its obligations under the School Councils Regulation (updated 2007) to provide school councils the opportunity to be involved in school AERRs and to share school results and interpretation of Accountability Pillar measures with school councils.
- web links to school websites and school results reports
- the web link to the jurisdiction AERR in both the print and posted versions.

**Note:**

An online AERR is under development. In the meantime, jurisdictions have the following options:

- use the Accountability Pillar reports provided by Alberta Education as an appendix to their AERR and provide the additional required information, i.e., targets and commentary on results, in the main part of the AERR using a format of their choosing, or
- copy and paste from the Accountability Pillar report into their own document (provided in Excel to facilitate this option), or
- use the AERR format that is being prepared and will be posted on the planning resources web page when available:  
<http://education.alberta.ca/admin/resources/planning.aspx>.  
Jurisdictions will be notified of the posting.

## Requirements for School Results Report for 2007/08

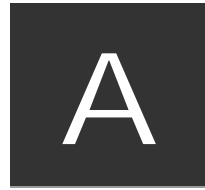
The school AERR for 2007/08 reports on the school's three-year plan for 2007-2010. A school's annual education results report is closely aligned with the AERR prepared by the jurisdiction. Each jurisdiction establishes requirements for the content and process for school annual reports. In addition, the elements listed below are required by Alberta Education, to ensure alignment with and accountability for provincial direction for the K – 12 system.

Alberta Education does not routinely collect or review the annual results reports prepared by individual schools. It is the responsibility of school jurisdictions to ensure that the following school reporting requirements are met:

- Results information related to *all* the goals, outcomes and performance measures — both local and provincial — identified in the school's education plan, including the following required measures, as applicable (e.g., high schools would not report PAT results):
  - Annual dropout rate of students aged 14-18
  - 3, 4 and 5-year high school completion rates.
  - Percentages of all students in Grades 3, 6 and 9 who achieve the acceptable standard and percentages who achieve the standard of excellence on provincial achievement tests (cohort results – overall and each subject and grade).
  - Participation rates in provincial achievement tests (PATs) for Grades 3, 6 and 9.
  - Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations (overall and each subject).
  - Percentages of students who have written four or more diploma exams within three years of entering Grade 10.
  - Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria.
  - 4 and 6-year high school to post-secondary transition rates.
- In addition, report the overall results (aggregated across respondent groups) for each Accountability Pillar survey measure for which sufficient data is available.
- School results reporting for the required provincial measures must include:
  - an assessment of progress in relation to past performance
  - five years of school results in relation to comparable provincial and jurisdiction results
  - any target set for 2007/08 and assessment of progress toward achieving the target.

**Notes:**

- Schools can access the information they need for student achievement and participation rates in the Accountability Pillar reports on Alberta Education's Extranet.
  - Reporting achievement test results for writers is optional.
  - Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- 
- Information on how the school council was involved in the school's annual results report.
  - A web link to the school's class size report on the jurisdiction's website.
  - Additional information, as required by the school jurisdiction.



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## Sample Formats for School Board Plans

The format provided below contains the requirements for education plans for 2008/10 – 2010/11. School jurisdictions may wish to use this information as a checklist to ensure their plan contains all the required components, even if a format of their own design is used. All elements are required, unless otherwise identified.

### Sample 1

**Message from Board Chair** (optional)

**Accountability Statement**

The **(jurisdiction's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities under the *School Act* and the *Government Accountability Act*. This education plan was developed in the context of the provincial government's business and fiscal plans. The board is committed to achieving the results laid out in this education plan.

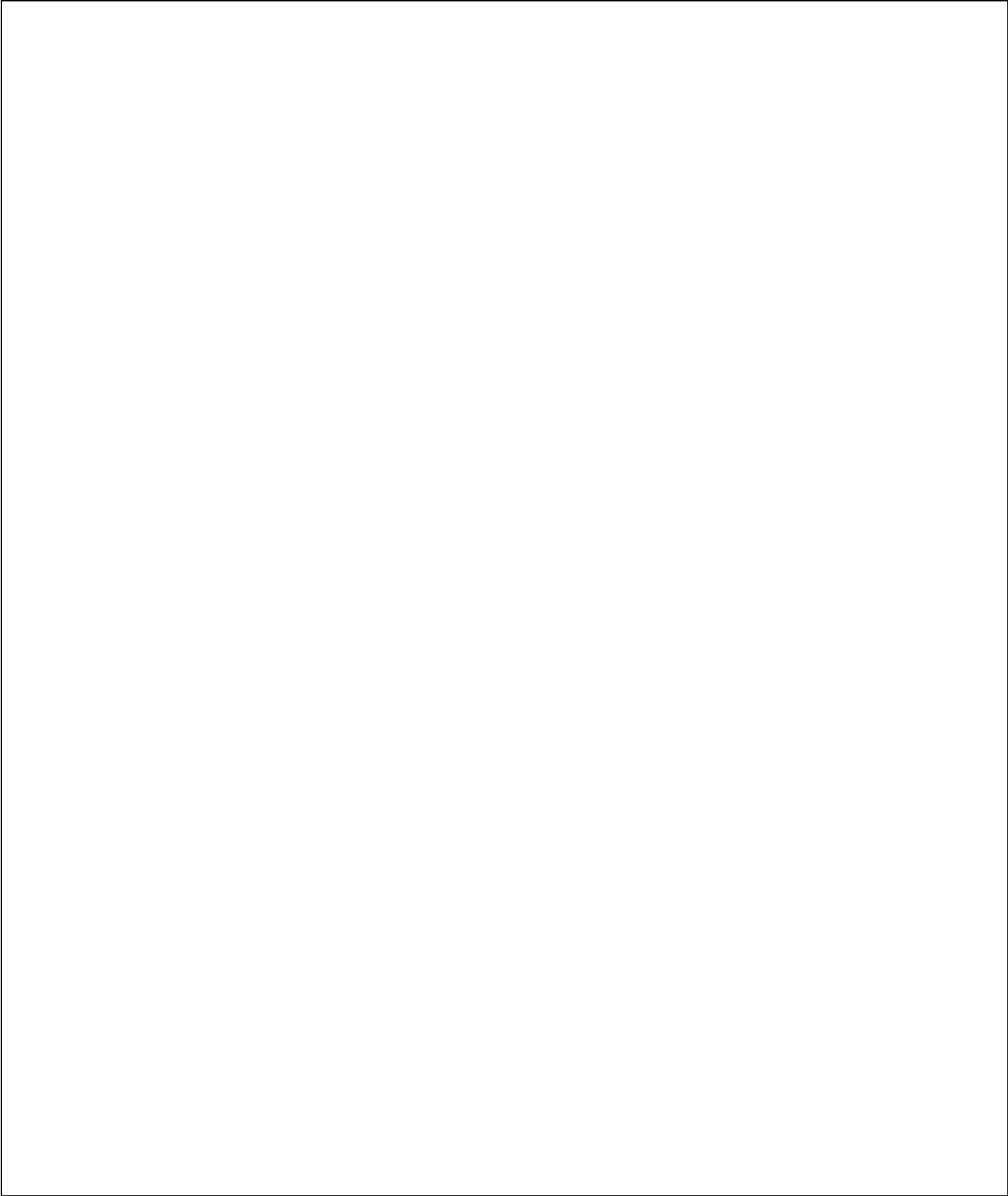
**Foundation Statements** (optional)

- Vision*
- Mission*
- Principles*

**Jurisdiction Profile** (optional)

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for the user to enter their Jurisdiction Profile information.

May 2008 Accountability Pillar Overall Summary



**Goal One: High Quality Learning Opportunities for All**  
**Outcome: Schools provide a safe and caring environment.**

Performance Measures	Current Result	Previous 3-yr Avg.	May 2008 Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school.</li> </ul>								
<b>Strategies</b> (see note)								

**Outcome: The education system meets the needs of all K-12 students, society and the economy.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.</li> </ul>								
<ul style="list-style-type: none"> <li>Overall teacher, parent and student satisfaction with the overall quality of basic education.</li> </ul>								
<ul style="list-style-type: none"> <li>Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community.</li> </ul>			n/a	n/a	n/a			
<b>Strategies</b> (see note)								

**Note:** Shaded measures are required but are not part of the Accountability Pillar.

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Children and youth at risk have their needs addressed through effective programs and supports.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Annual dropout rate of students aged 14 to 18.</li> </ul>								
<b>Strategies</b> (see note)								

**Outcome: Students complete programs.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>High school completion rate of students within three years of entering Grade 10.</li> </ul>								
<b>Strategies</b> (see note)								

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Goal Two: Excellence in Student Learning Outcomes**

**Outcome: Students demonstrate high standards in learner outcomes.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.*</li> </ul>								
<ul style="list-style-type: none"> <li>Overall percentage of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests.</li> </ul>								
<ul style="list-style-type: none"> <li>Overall percentage of students who achieved the acceptable standard on diploma examinations.*</li> </ul>								
<ul style="list-style-type: none"> <li>Overall percentage of students who achieved the standard of excellence on diploma examinations.</li> </ul>								
<ul style="list-style-type: none"> <li>Percentage of students writing four or more diploma exams within three years of entering Grade 10.</li> </ul>								
<ul style="list-style-type: none"> <li>Percentage of Grade 12 students eligible for a Rutherford Scholarship.</li> </ul>								
<b>Strategies</b> (see note)								

\*The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Students are well prepared for lifelong learning.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>High school to post-secondary transition rate of students within six years of entering Grade 10.</li> </ul>								
<b>Strategies</b> (see note)								

**Outcome: Students are well prepared for employment.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school.</li> </ul>								
<b>Strategies</b> (see note)								

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Students model the characteristics of active citizenship.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall teacher, parent and student agreement that students model the characteristics of active citizenship.</li> </ul>								
<b>Strategies</b> (see note)								

**Goal Three: Highly Responsive and Responsible Jurisdiction**

**Outcome: The education system at all levels demonstrates effective working relationships.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall teacher and parent satisfaction with parental involvement in decisions about their child's education.</li> </ul>								
<b>Strategies</b> (see note)								

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: The education system at all levels demonstrates leadership and continuous improvement.**

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/2009	2009/2010	2010/2011
<ul style="list-style-type: none"> <li>Overall percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same in the last three years.</li> </ul>								
<ul style="list-style-type: none"> <li>Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.</li> </ul>			n/a	n/a	n/a			
<b>Strategies</b> (see note)								

**Note:** Shaded measures are required but are not part of the Accountability Pillar.

**Budget Highlights**

- Key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus from the prior year to address evaluation of Accountability Pillar results.
- Guiding principles used in financial planning
- Charts/tables to summarize information
- A web-link to the jurisdiction's Budget Report Form

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Highlights of Facility and Capital Plans**

- Brief description of major school renewal or construction projects and benefits for students.*
- A web-link to more detailed information.*

**Publication and Communication**

- Include web link to posted document.*
- Indicate how the three-year plan has been/will be communicated to parents and the public.*
- Indicate how the school board provided an opportunity for school councils to be involved in updating school three-year education plans.*

The format provided below contains the requirements for education plans for 2008/10 – 2010/11. School jurisdictions may wish to use this information as a checklist to ensure their plan contains all the required components, even if a format of their own design is used. All elements are required, unless otherwise identified.

## Sample 2

### **Message from Board Chair** (optional)

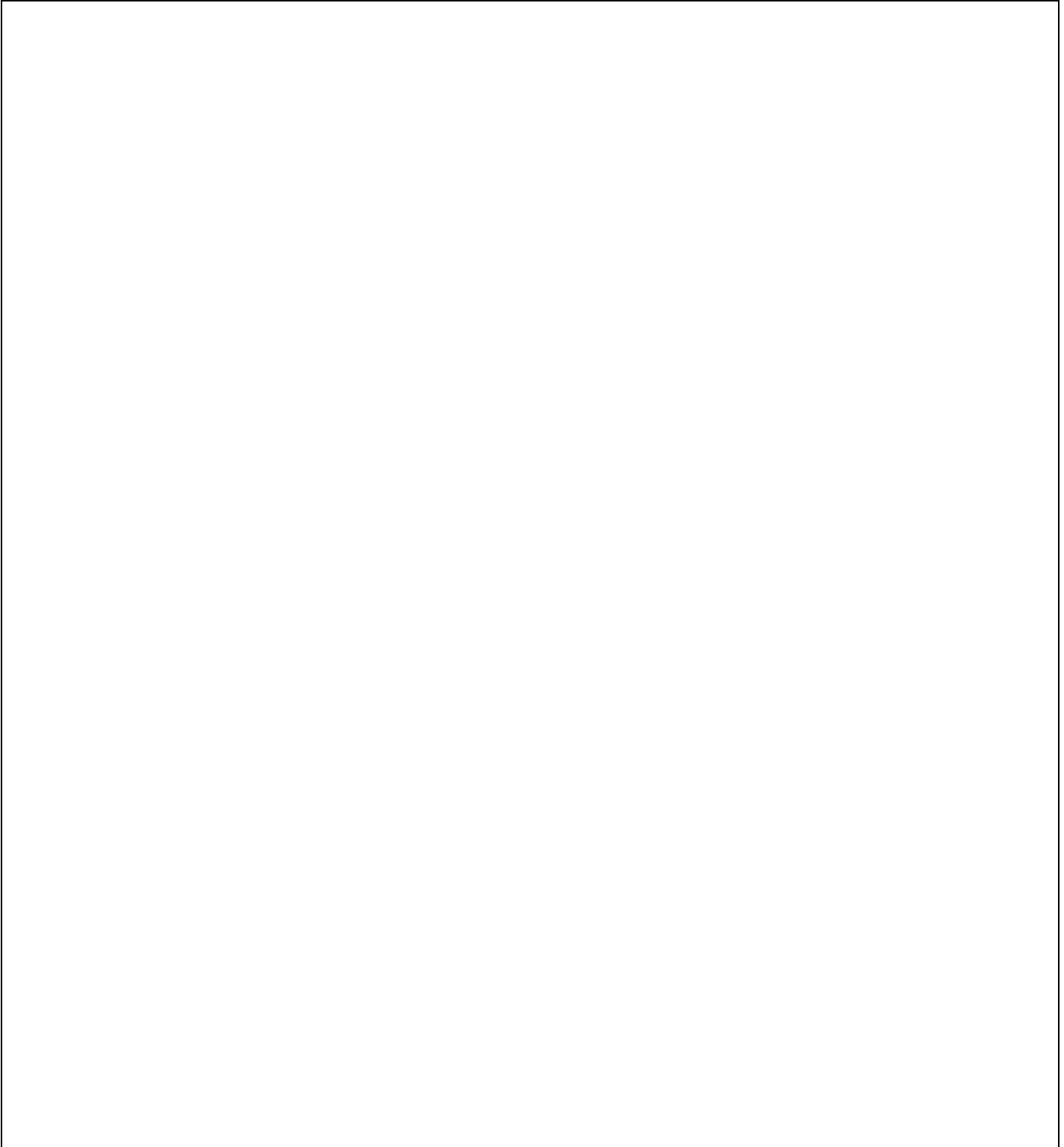
**Accountability Statement**

The **(jurisdiction's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities under the *School Act* and the *Government Accountability Act*. This education plan was developed in the context of the provincial government's business and fiscal plans. The board is committed to achieving the results laid out in this education plan.

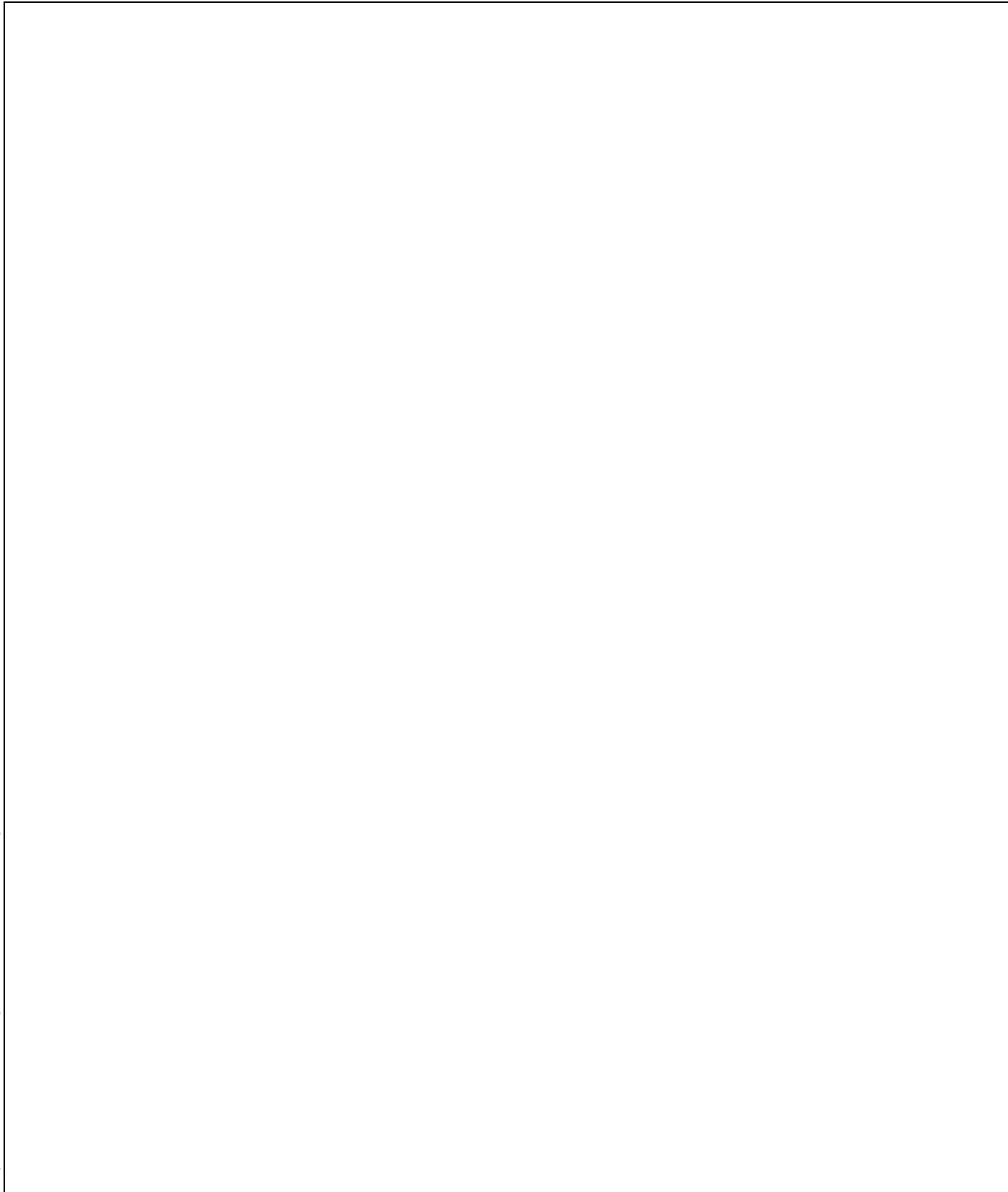
**Foundation Statements** (optional)

- Vision
- Mission
- Principles

**Jurisdiction Profile** (optional)



May 2008 Accountability Pillar Overall Summary



**Goal One: High Quality Learning Opportunities for All**

**Outcome: Schools provide a safe and caring environment.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school. See Safe and Caring Schools, page —.			

**Outcome: The education system meets the needs of all K-12 students, society and the economy.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. See Program of Studies, page —.			
Overall teacher, parent and student satisfaction with the overall quality of basic education.			
Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community. See Satisfaction with Program Access, page —.			

**Note:** Shaded measures are required but are not part of the Accountability Pillar.

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Children and youth at risk have their needs addressed through effective programs and supports.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Annual dropout rate of students aged 14 to 18. See Dropout Rate, page —.			

**Outcome: Students complete programs.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> High school completion rate of students within three years of entering Grade 10. See High School Completion, page —.			

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Goal Two: Excellence in Student Learning Outcomes**

**Outcome: Students demonstrate high standards in learner outcomes.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b>			
Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.* See PAT Acceptable, page —.			
Overall percentage of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests. See PAT Excellence, page —.			
Overall percentage of students who achieved the acceptable standard on diploma examinations.* See Diploma Acceptable, page —.			
Overall percentage of students who achieved the standard of excellence on diploma examinations. See Diploma Excellence, page —.			
Percentage of students writing four or more diploma exams within three years of entering Grade 10. See Diploma Exam Participation Rate, page —.			
Percentage of Grade 12 students eligible for a Rutherford Scholarship. See Rutherford Scholarship Eligibility Rate, page —.			

\*The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Students are well prepared for lifelong learning.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> High school to post-secondary transition rate of students within six years of entering Grade 10. See Transition Rate, page —.			

**Outcome: Students are well prepared for employment.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school. See Work Preparation, page —.			

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: Students model the characteristics of active citizenship.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall teacher, parent and student agreement that students model the characteristics of active citizenship. See Citizenship, page —.			

**Goal Three: Highly Responsive and Responsible Jurisdiction**

**Outcome: The education system at all levels demonstrates effective working relationships.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall teacher and parent satisfaction with parental involvement in decisions about their child's education. See Parental Involvement, page —.			

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Outcome: The education system at all levels demonstrates leadership and continuous improvement.**

Targets (if applicable, see note)			Strategies (see note below)
2008/09	2009/10	2010/11	
<b>Performance Measure(s)</b> Overall percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same in the last three years. See School Improvement, page —.			
Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth. See Inservice Jurisdiction Needs, page —.			

**Note:** Shaded measures are required but are not part of the Accountability Pillar.

**Budget Highlights**

Key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus from the prior year to address evaluation of Accountability Pillar results.  
 Guiding principles used in financial planning  
 Charts/tables to summarize information  
 A web link to the jurisdiction's Budget Report Form

**Please Note**

**TARGETS**

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

**STRATEGIES**

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

**Highlights of Facility and Capital Plans**

- Brief description of major school renewal or construction projects and benefits for students.*
- A web link to more detailed information.*

**Publication and Communication**

- Include web link to posted document.*
- Indicate how the three-year plan has been/will be communicated to parents and the public.*
- Indicate how the school board provided an opportunity for school councils to be involved in updating school three-year education plans.*




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## Definitions for Required Performance Measures

Outcomes	<i>Definitions for Required Performance Measures</i>
<p><b>Schools provide a safe and caring environment for students.</b></p>	<p><b>Safe and Caring:</b> Percentages of teachers, parents and students who agree that students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school.</p> <p><b>Definition:</b> Teachers, parents and students are asked whether:</p> <ul style="list-style-type: none"> <li>– students feel safe at school</li> <li>– students feel safe on the way to and from school</li> <li>– students treat each other well at school</li> <li>– teachers care about their students</li> <li>– students are treated fairly by adults at school.</li> </ul>
<p><b>The education system meets the needs of all K-12 students, society and the economy.</b></p>	<p><b>Program of Studies:</b> Percentages of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.</p> <p><b>Definition:</b> Teachers, parents and students are asked about:</p> <ul style="list-style-type: none"> <li>– the variety of courses available to students/you at school,</li> <li>– opportunities students/you have at school to: <ul style="list-style-type: none"> <li>• learn about music</li> <li>• learn about drama</li> <li>• learn about art</li> <li>• learn about computers</li> <li>• learn about health</li> <li>• learn another language</li> <li>• participate in physical education.</li> </ul> </li> </ul> <p><b>Education Quality:</b> Percentages of teachers, parents and students satisfied with the overall quality of basic education.</p> <p><b>Definition:</b> Teachers, parents and students are asked about the following:</p> <ul style="list-style-type: none"> <li>– overall quality of education in your/your child's school</li> <li>– the quality of teaching in your/your child's school</li> <li>– what is being learned in the core subjects is useful (students), students are learning what they need to know (parents and teachers)</li> <li>– school work is interesting</li> <li>– school work is challenging</li> <li>– learning expectations at school are clear.</li> </ul> <p><b>Satisfaction with Program Access:</b> Percentages of teachers, parents and students satisfied with the accessibility, effectiveness and efficiency of programs and services for students in their community.</p> <p><b>Definition:</b> Teachers, parents and students are asked about the following services for student in schools:</p> <ul style="list-style-type: none"> <li>– academic counselling</li> <li>– career counselling</li> </ul>

Appendix B-Definitions for Required Performance Measures

Outcomes	<b>Definitions for Required Performance Measures</b>
	<ul style="list-style-type: none"> <li>– library services</li> <li>– supports for students with special needs.</li> </ul>
<b>Children at Risk have their needs addressed through effective programs and supports</b>	<p><b>Drop Out Rate:</b> Annual dropout rate of students aged 14 to 18.</p> <p><b>Definition:</b> Alberta students aged 14-18 are tracked for one year to determine how many have left the education system without completing. Students are considered to have dropped out if they are not enrolled in the following year or have not met the high school completion criteria, i.e., have not, within the tracking period: received a high school diploma, IOP Certificate, high school equivalency (GED), earned credit in five Grade 12 courses (including four diploma exam courses), or enrolled in a K-12 school in Alberta, an Alberta post-secondary institution or registered in an Alberta apprenticeship program.</p>
<b>Students complete programs</b>	<p><b>High School Completion Rate (3 yr):</b> Percentages of students who completed high school within three years of entering Grade 10.</p> <p><b>Definition:</b> Alberta Grade 10 students are tracked for three years to determine if they have completed high school. Student are considered to have completed high school if they have, within the tracking period:</p> <ul style="list-style-type: none"> <li>– received an Alberta high school diploma, an IOP Certificate, high school equivalency (GED)</li> <li>– entered a post-secondary level program at an Alberta post-secondary institution</li> <li>– registered in an Alberta apprenticeship program or</li> <li>– earned credit in five Grade 12 level courses, including four diploma examination courses.</li> </ul> <p>NOTE: Four- and five-year rates also are calculated and provided to school jurisdictions in May for use in planning. These additional results are required to be reported in the AERR</p>
<b>Students Demonstrate High Standards</b>	<p><b>PAT: Acceptable:</b> Percentages of students who achieve the acceptable standard on Grades 3, 6 and 9 Provincial Achievement Tests (overall all grades and subjects).</p> <p><b>PAT: Excellence:</b> Percentages of students who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests (overall all grades and subjects).</p> <p><b>Definition:</b> A student achieving the acceptable standard shows an adequate understanding of the core knowledge and adequate basic skills essential core academic subjects: language arts, mathematics (for Grades 3, 6 and 9) and science and social studies (for Grades 6 and 9). A student achieving the standard of excellence consistently shows a deeper understanding of the concepts of the course demonstrating an ability to integrate information and evaluate it from various points of view. Results are calculated as the percentage of all students in each grade (total enrollment in the grade plus the ungraded students who are in the corresponding year of schooling) who have met the acceptable standard and the percentage who have met the standard of excellence. The overall result is the weighted average of the result for each test.</p> <p>NOTE: Results are also calculated for each grade and subject and provided to school jurisdictions for their use. These additional results are required to be reported in the AERR.</p> <p><b>Diploma: Acceptable:</b> Percentages of students who achieve the acceptable standard on diploma examinations (overall results - all subjects).</p> <p><b>Diploma: Excellence:</b> Percentages of students who achieve the standard of excellence on diploma examinations (overall results - all subjects).</p> <p><b>Definition:</b> Diploma examination results are based on the numbers of students writing each exam who achieve the standards. Achieving the acceptable standard (i.e., a mark of 50%) indicates that the student has met the basic requirements of the course. Achieving the standard of excellence (i.e., a mark of 80%) indicates that the student has performed significantly beyond the minimum requirements of the course. The overall diploma exam result is the weighted average of the result for each exam.</p> <p>NOTE: Results also are calculated for each diploma exam subject and provided to school jurisdictions for their use. These additional results are required to be reported in the AERR.</p> <p><b>Diploma Exam Participation Rate (4+ Exams):</b> Percentages of students who have written four or more diploma exams by the end of their third year in high school.</p> <p><b>Definition:</b> The diploma exam participation rate is calculated by tracking Grade 10 students for three school years to determine the percentage of students who have written four or more diploma exams within the tracking period.</p> <p><b>Rutherford Scholarship Eligibility Rate:</b> Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria.</p> <p><b>Definition:</b> Rutherford Scholarship eligibility is calculated by determining the percentage of Alberta Grade 12 students who have marks of 80% or higher in any of the eligible Grades 10, 11 or 12 courses.</p>
<b>Students are well prepared for lifelong learning</b>	<p><b>Post-Secondary Transition Rate (6 yr):</b> Percentages of students who have enrolled in a post-secondary program within four years of entering Grade 10.</p> <p><b>Definition:</b> The high school to post-secondary transition rate is calculated by tracking Alberta Grade 10 students</p>

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Outcomes	<b>Definitions for Required Performance Measures</b>
	<p>for six years to determine if they have entered a post-secondary-level program at an Alberta post-secondary institution or registered in an Alberta apprenticeship program within the tracking period. An estimate of out-of-province post-secondary enrollment is applied based on the numbers of funded Alberta students attending post-secondary institutions out of province.</p> <p>NOTE: Four-year rates also are calculated and provided to school jurisdictions in May for use in planning. These additional results are required to be reported in the AERR.</p>
<b>Students are well prepared for employment</b>	<p><b>Work Preparation:</b> Percentages of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school.</p> <p><b>Definition:</b> Teachers and parents are asked to indicate whether students in your school/your child are taught attitudes and behaviours that will enable them be successful at work they leave school.</p>
<b>Students model the characteristics of active citizenship</b>	<p><b>Citizenship:</b> Percentages of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.</p> <p><b>Definition:</b> Teachers, parents and students are asked whether students at your school/your child's school:</p> <ul style="list-style-type: none"> <li>- help each other</li> <li>- respect each other</li> <li>- are encouraged at school to be involved in activities that help the community (not asked on the Grade 4 survey)</li> <li>- are encouraged to try their best</li> <li>- follow the rules.</li> </ul>
<b>The jurisdiction demonstrates effective working relationships with partners and stakeholders</b>	<p><b>Parental Involvement:</b> Percentages of teachers and parents satisfied with parental involvement in decisions about their child's education.</p> <p><b>Definition:</b> Teachers and parents are asked:</p> <ul style="list-style-type: none"> <li>- about the opportunity for parental involvement in decisions about their child's education</li> <li>- about the opportunity for parental involvement in decisions at their child's school</li> <li>- whether parental input into decisions at their child's school is considered</li> <li>- whether parents are involved "A Lot" or "Some" with decisions about their child's education.</li> </ul>
<b>The jurisdiction demonstrates leadership and continuous improvement</b>	<p><b>School Improvement:</b> Percentages of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years.</p> <p><b>Definition:</b> Teachers and parents are asked whether the quality of education at your school/your child has received has improved, stayed the same or declined in the past three years. <b>Students are asked:</b></p> <ul style="list-style-type: none"> <li>- are you proud of your school</li> <li>- would you recommend your school to a friend (not asked on the Grade 4 survey).</li> </ul> <p><b>Note:</b> Addition reflects data already included in this measure.</p> <p><b>Inservice Jurisdiction Needs:</b> Percentages of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.</p> <p><b>Definition:</b> Teachers are asked whether the professional development opportunities made available through the jurisdiction have:</p> <ul style="list-style-type: none"> <li>- been focused on the priorities of the jurisdiction</li> <li>- effectively addressed your professional development needs</li> <li>- significantly contributed to your on-going professional development.</li> </ul>

**Notes:**

1. For survey measures:
  - All teachers in K-12 schools and all students in Grades 4, 7 and 10 and their parents are included in the surveys.
  - The surveys of students and teachers are administered online, and the parent survey is mailed to the student's address on file.
  - The percentage for each respondent group is calculated by averaging the responses to all the questions that comprise the measure. The overall percentage is calculated by averaging the results for each respondent group.
  - A four-point scale is used for satisfaction and agreement questions, and don't know responses are recorded.
  - Results for each respondent group also are calculated and provided to school jurisdictions for their use.
2. For measures that track students for one or more years, an attrition estimate, i.e., the number of students in the same age group who have left the province or are deceased, is factored into the calculation.
3. For measures based on the Grade 10 cohort, students are attributed to the jurisdiction where they earned the most credits.





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## Glossary of Planning and Accountability Terms

**Accountability:** An obligation to answer for assigned responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results.

**Continuous Improvement:** Using performance results to adjust strategies and practices so that improvement in performance is achieved over time.

**Goals:** Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims.

**Issues:** An issue is a condition that may affect the organization's ability to fulfill its mandate or achieve its goals.

**Mission Statement:** A mission statement is a clear, concise description of a school jurisdiction's overall purpose and role. It gives direction to the programs and services that the jurisdiction provides for its students.

**Outcomes:** Outcomes are measurable statements of what school jurisdictions and schools seek to achieve. In broad terms, they answer the question, "What will this look like when we get to where we want to be?"

**Performance Measures:** Performance measures provide information on important, quantifiable aspects of the education system. They enable jurisdictions to assess progress toward achieving goals and outcomes.

**Principles and Beliefs:** Principles and beliefs guide decision-making and provide a foundation for developing mission, vision and goals.

**Profile:** A profile is a brief description of the school jurisdiction or school that gives context for the plan. Profiles include such information as characteristics of communities, students, programs, size and location.

**Strategies:** Strategies are actions that school jurisdictions and schools take to achieve goals and desired outcomes that meet the needs of all

their students. They address local circumstances, issues, trends and opportunities.

**Targets:** Targets show desired levels of performance to be attained by a certain time. Targets are expressed quantitatively.

**Trend:** A trend shows a direction of data over time, e.g., enrolment growth.

**Vision:** A vision describes a possible and desired future state for the organization, grounded in reality, which inspires and guides decisions and actions.

## Terms Related to the Accountability Pillar Evaluation

*(in logical, rather than alphabetical order)*

**Accountability Pillar:** The Accountability Pillar is one of the three pillars of the Renewed Funding Framework and enhances school jurisdiction accountability for results in return for greater flexibility in the allocation of resources. The Accountability Pillar places increased emphasis on the achievement of specific outcomes by evaluating and reporting results on a common set of measures, and where results are low or declining, taking action to improve student programs and results in subsequent years. The focus of the Accountability Pillar is on improving school jurisdiction results and attaining high levels of achievement.

**Accountability Pillar Performance Measures:** The Accountability Pillar performance measures are a required, consistent set of measures, each of which is calculated on a comparable basis for all jurisdictions. School jurisdictions are required to include this common set of performance measures and evaluations in their plans and report the results and updated evaluations for these measures in their Annual Education Results Reports. The measures draw from various kinds of data, including:

- Results of provincial testing programs,
- Student outcomes, such as dropout and high school completion rates, and
- Student, parent and teacher perceptions.

**Category:** Accountability Pillar measures are grouped into seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools,
- Student learning opportunities,
- Student learning achievement (Grades K to 9),
- Student learning achievement (Grades 10 to 12),
- Preparation for lifelong learning, employment and citizenship,
- Parental involvement, and
- Continuous improvement.

**Evaluation Methodology:** The evaluation methodology has been developed which assesses each measure in the Accountability Pillar in terms of achievement and improvement, then combines the achievement and improvement evaluations to calculate overall evaluations for measures and categories.

**Achievement Evaluation:** The Achievement evaluation is based on comparing the current jurisdiction result against a set of provincial standards that are expected to be fixed for 7 – 10 years. The achievement evaluation results in one of the following five achievement levels: Very High, High, Intermediate, Low, Very Low.

**Standard:** A standard is an established, quantifiable level of performance that is commonly understood and agreed upon, and is the basis for judging actual performance. The standards for each Accountability Pillar measure are calculated from baseline data (based on the distribution of results for all jurisdictions at a fixed point in time). The 5<sup>th</sup>, 25<sup>th</sup>, 75<sup>th</sup> and 95<sup>th</sup> percentiles of the distribution of the baseline results are used to establish the five achievement evaluation levels (listed above under “Achievement Evaluation”).

**Baseline:** Baseline data constitute a starting point for comparisons of results against standards. Baseline data for each Accountability Pillar measure are established by averaging each jurisdiction’s results across the three years to create a jurisdiction three-year average. The three years that form the baseline for calculating standards differ among measure types, depending on data availability:

- For student achievement measures (i.e., Provincial Achievement tests and Diploma Exams), the baseline three-year average uses data from school years 2001/02, 2002/03, and 2003/04.

- For the student outcome measures (dropout, diploma exam participation, high school completion, post-secondary transition and Rutherford Scholarship eligibility rates), the baseline three-year average uses data from the 2000/01, 2001/02 and 2002/03 school years.
- For survey measures, the baseline three-year average uses results from 2003/04, 2004/05 and 2005/06.

**Improvement Evaluation:** The improvement evaluation focuses on improvement over time. Improvement is evaluated by comparing the jurisdiction's current result against the jurisdiction's previous three-year average using chi-square. (Chi square is a statistical test to determine the probability that there is no significant difference between an observed outcome and the expected outcome. In the case of the Accountability Pillar improvement evaluation, the chi square test is used to determine the probability that there is no significant difference between a jurisdiction's current result on a measure and its prior three-year average for that measure.) The improvement evaluation results in one of the following five improvement levels: Improved Significantly, Improved, Maintained, Declined, Declined Significantly.

**Overall Measure Evaluation:** Once the improvement and achievement levels have been calculated for a measure, an overall measure evaluation is calculated, which reflects both the achievement evaluation and the improvement evaluation. The overall measure evaluation is reported on a five point scale: Excellent, Good, Acceptable, Issue, Concern.

**Category Evaluation:** For each category of Accountability Pillar measures, the overall evaluations for each measure within that group are averaged to provide an evaluation for that category. The averaging is done by assigning the following numbers to the overall evaluation for each measure: Excellent: 2; Good: 1; Acceptable: 0; Issue: -1, and Concern: -2. These values are averaged and rounded to the nearest whole number. This result is then compared with the above list of assigned numerical values for each of the five evaluation ratings to determine the evaluation for the category.

**Improvement/Decline:** Improvement or decline for an Accountability Pillar measure is determined by comparing the current result against the previous three-year average using the chi-square test of statistical significance. Using the chi-square test:

- an **improvement or decline** occurs when the current result is at least one standard deviation above or below the previous three-year average, but less than two standard deviations.
- a **significant improvement or decline** (at the 5% level of confidence, or nineteen times out of twenty) occurs when the current result is approximately two or more standard deviations above or below the previous three-year average.

**Target:** Targets related to achievement standards are set for each year of the plan when the evaluation of results for a measure is “Issue” or “Concern”. These targets for Accountability Pillar measures:

- have a higher numerical value each year than current result (except for dropout rates, where a lower result shows improvement)
- show reasonable progress toward or move into the next higher achievement standard over the three years.

Making gains over time toward the next achievement level or attaining it will be reflected in the improvement evaluation as well. At minimum the improvement evaluation would be “Maintained,” and could be “Improved” or “Improved Significantly.”





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## Development of the Accountability Pillar

Drawing on the work of the Funding Framework Review Committee and the Review Committee on Outcomes, the Accountability Pillar Design and Implementation Advisory Sub-Committee (the sub-committee) worked with Alberta Education to develop the Accountability Pillar, including identifying the common set of performance measures. The following organizations were represented on the sub-committee: Alberta School Boards Association (ASBA), College of Alberta School Superintendents (CASS), Association of School Business Officials of Alberta (ASBOA), The Alberta Teachers' Association (ATA), Alberta Home & School Councils' Association (AHSCA), Fédération des conseils scolaires francophones de l'Alberta (FCSFA).

The sub-committee's guiding principles for the Accountability Pillar:

- transparent process
- emphasis on achievement
- holistic approach to evaluation
- on-going collaborative processes
- all jurisdictions can succeed.

The Accountability Pillar is aligned with Alberta Education's goals and outcomes for the K – 12 system and is integrated with the accountability framework in place since 1995. It focuses on:

- supporting continuous improvement
- improving student outcomes
- providing a clear understanding of jurisdiction performance and successes.





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