

Ministry of Education

**Catholic District School Board of
Eastern Ontario
Follow-up Report to the Operational
Review**

September 2011

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1. Introduction

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

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

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

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

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

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

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

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

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

2. Status and Implementation Update

Introduction

The Catholic District School Board of Eastern Ontario Operational Review follow-up review took place on June 22, 2011, approximately 12 months after the release of the initial Operational Review report. The PricewaterhouseCoopers Operational Review team conducted a meeting with senior administrative officials of the school board. In advance of the meeting, the PricewaterhouseCoopers team selected several key recommendations from the Operation Review Report and asked the school board to provide an implementation status along with any related supporting material.

Summary of Recommendation Status

The school board has made significant progress in implementing the recommendations since the completion of its original Operational Review in May 2010. Of particular note are the steps taken to implement an attendance support program and to enhance the interim financial reporting processes and green clean programs.

Following the Operational Review, management reported the findings of the Operational Review report to the Board of Trustees.

There were 31 recommendations made in the original report. The Operational Review team focused on 16 of the recommendations in the follow-up review. The opportunities presented a cross section of strategic planning initiatives, some from 12 areas of opportunity identified in the sector reports as well as those that were of specific risks to the Catholic District School Board of Eastern Ontario. The selected recommendations and the corresponding criteria are listed in Appendix A.

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

3. Governance and School Board Administration

#1 Annual Operating Plan

Operational Review Recommendation	Implementation Update
Using its multi-year strategic plan as a framework, the school board should develop an annual board-wide operating plan. The annual operating plan should be aligned with the strategic plan, incorporate both academic and non-academic departments, and contain goals that are specific, measurable, achievable, relevant, and timely.	Implemented

#2 Policy Development

Operational Review Recommendation	Implementation Update
The school board should establish a formal policy review schedule to ensure that all policies are reviewed periodically.	In Progress

#3 Succession Planning

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

#1 Annual Operating Plan

The Director of Education has developed a three-year strategic plan (2010-13). Within each service area, there are individual departmental or service area operating plans that are reviewed regularly. In developing the individual operating plans, each department references the Board's multi-year strategic plan to ensure that there is alignment.

The Board's annual operating plan is comprehensive and covers all service areas including curriculum, student success, finance, health and safety, human resources, information communications and technology (ICT), plant & maintenance, religious & family life education, special education and transportation. Each department describes a full profile of their goals and action plans and most importantly how they align with the Board's multi-year strategic plan. There is also a progress summary of each department's goals, timelines, performance indicators and responsible individual(s).

The Board should be commended for adopting the leading practice and producing a good example of an operating plan.

#2 Policy Development

The Board has conducted regular Policy Committee meetings since the Operational Review to review the Board's policies to ensure that they are aligned and in compliance with all regulatory and mandatory directives including the Student Achievement and School Board Governance Act, Bill 177. The Board plans to establish a formal review schedule in the current school year. One option being considered is a regular monthly review to go through all policies.

#3 Succession Planning

The Board has developed a formal Succession Plan and Talent Development Initiative for 2010-2011. The plan outlines initiatives in four areas:

- Mentoring for new principals and vice-principals
- Aspiring Leader Series – focused on school administration
- Ongoing Professional Development – various in-service and conference opportunities for principals and school administrators
- Realization Network – a broad-based consisting of teams from all schools, focusing on “high yield” instructional strategies based on 14 parameters.

The Board is encouraged to document its formal succession plan for senior administrators and key leadership positions including members of the Executive Council.

4. Human Resource Management and School Staffing/Allocations

#1 Annual Plan

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

#2 Attendance Management

Operational Review Recommendation	Implementation Update
Management should finalize establishing a comprehensive attendance support program.	Implemented

#3 Benefit Compliance

Operational Review Recommendation	Implementation Update
Management should conduct independent compliance audits of the school board's insurance carrier to ensure adherence to the benefit plan's terms and conditions.	Implemented

#1 Operating Plan

The HR department has formally documented its operating plan as part of the Board's overarching system operating plan. The department has documented its goals, timelines, performance indicator and responsible individual(s) for each goal. The operating plan is reviewed regularly and formally refreshed at least once a year.

As part of the operating plan, the department has also documented a detailed profile of its services and responsibilities. The profile is useful in communicating the department's vision and goals effectively to other stakeholders within the school board.

#2 Attendance Management

The HR department has engaged an external consultant to assist in the development of a comprehensive attendance support program. Meetings were conducted with staff union groups including CUPE and OECTA to discuss the attendance support program.

The Board also developed a formal policy and administrative procedure to support the implementation of the attendance support program. These were approved by the school board's Executive Council and the Board of Trustees.

In addition, the school board purchased attendance support software to assist HR staff in tracking and identifying attendance related issues. During the implementation of the attendance support software, the HR department encountered some IT issues which have since been resolved.

The HR department indicated that it expects the attendance support system to result in marked decreases in replacement costs associated with staff absence. The tools and software in place will enable the school board to closely track staff absence, identify trends, and provide reports on the effectiveness of the program. The HR department plans to formally present to both Executive Council and the Board of Trustees on the effectiveness of the program, once sufficient data and results have been collected.

The school board is encouraged to track and monitor the results of the attendance support program as attendance data becomes available on the new attendance support software. Management should also periodically report on the effectiveness of the attendance support processes/program to senior management and the Board.

#3 Benefits Compliance

The HR department has conducted an independent compliance audit of its benefits carrier. The audit had been completed by an external consultant in June 2010, and the report revealed that the carrier has adhered generally to the benefit plan's terms and conditions. However, the audit has identified several issues which required further attention. The HR department has met with the carrier, and these issues have since been addressed.

The HR department believed that the audit was very helpful in ensuring compliance and that the results have led to significant long term improvements to the school board's benefits program.

5. Financial Management

#1 Annual Plan

Operational Review Recommendation	Implementation Update
The Finance department's annual planning should build on the information contained in the profile and establish specific and measurable targets and indicators and assign responsibilities and timelines.	Implemented

#2 Risk Management

Operational Review Recommendation	Implementation Update
Management should consider enhancing the process of reporting on the school board's budget risks using the format suggested in section 4.2 of this report. The documentation of such information on a periodic and ongoing basis would give reviewers a better understanding of the school board's budget risks.	Implemented

#3 Financial Reporting

Operational Review Recommendation	Implementation Update
Management should finalize the development of interim financial reporting template and provide periodic reports to the Board.	Implemented

#4 Internal Audit

Operational Review Recommendation	Implementation Update
Management should establish an internal audit function giving due consideration to the new Ministry's direction on internal audit.	Implemented

#5 Audit Committee

Operational Review Recommendation	Implementation Update
Management and the board of trustees should consider establishing an audit committee that includes external advisors in accordance with the Ministry's emerging direction on internal audit.	Implemented

#1 Operating Plan

The finance department has formally documented its operating plan as part of the Board's overarching system operating plan. The department has documented its goals, timelines, performance indicator and responsible individual(s) for each goal. The operating plan is reviewed regularly and formally refreshed at least once a year.

As part of the operating plan, the department has also documented a detailed profile of its services and responsibilities. The profile is useful in communicating the department's vision and goals effectively to other stakeholders within the school board.

#2 Risk Management

The Finance department has adopted the recommendation of the Operational Review to implement a detailed budget risk management plan. This was implemented as part of the update to the interim financial report.

The first page of the interim financial report now includes a percentage risk assessment based on actual expenditures compared to revised estimates, including the previous year's and same period comparable figures.

The Finance department has also documented strategies to mitigate the known budget risks.

#3 Interim Financial Reporting

The Finance department presented the IFRC recommendations to the Board and sought input for revisions to the Board's interim financial report.

Trustees commented that the revised report was easy to read and understand. Comments indicated that it provided Trustees with an adequate high-level summary of the current financial position relative to previous year comparable figures and also provided information on two other non-financial indicators including enrolment and staffing. Trustees made suggestions regarding incorporating previous year enrolment and staffing numbers on the second page of the dashboard. These changes were incorporated into the May 2011 report.

#4 Internal Audit

The Board has established an internal audit function through its participation in the regional internal audit initiative.

The school board is part of the Ottawa Regional Internal Audit Team (RIAT). The Associate Director, Manager and Assistant Manager of Finance met with the Regional Internal Audit Manager in October 2010 to review documentation and internal audit

requirements. The Regional Internal Audit Manager provided detailed information regarding the internal audit plan for our region and the associated risk assessment required for the school board.

The school board reviewed documentation provided and the impact on workload/reporting timelines and completed the school board's risk assessment template in January 2011. In February and March 2011, the Finance Department coordinated the completion of the entire Regional Internal Audit Risk Assessment for the school board.

All functional areas of the Risk Assessment were completed by March 31, 2011.

The Finance department held half day meetings with the appropriate Superintendents/Managers of the school board to answer all the risk assessment questions for each functional area prior to the review meetings with the RIAT. Draft Inherent Risk and Residual Risk Heat Maps were presented at the first meeting of the Board's Audit Committee on March 30, 2011.

RIAT presented a current and subsequent year audit plan at the June 2011 Audit Committee meeting for review and approval.

#5 Audit Committee

The Board formally recruited external members for the Audit Committee. In November 2010, the school board advertised through newspaper advertisements for two volunteer external committee members. Applications were received by the Associate Director of Education by November 26, 2010 for selection.

Two external Audit Committee members were recommended to the Board of Trustees for approval on December 21, 2010. Two trustees were appointed to the Audit Committee at the opening board meeting of February 1, 2011. The Audit Committee along with the Associate Director, Manager of Finance and Assistant Manager of Finance attended the Audit Committee training on February 17-18, 2011 in Ottawa.

The 1st Audit Committee meeting of the Board was held on Wednesday, March 30, 2011.

6. School Operations and Facilities Management

#1 Operating Plan

Operational Review Recommendation	Implementation Update
The Plant and Maintenance department's annual planning should build on the information contained in the department profile, establish specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Implemented

#2 Green Clean

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

#3 Energy Management Plan

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

#4 Energy Management Reporting

Operational Review Recommendation	Implementation Update
Once the energy management plan is established, management should provide formal annual reporting on the energy conservation savings achieved against the plan.	In Progress

#5 Environmental Policy

Operational Review Recommendation	Implementation Update
The school board should develop an overarching environmental policy that would provide framework for its activities in the area of environmental education and responsible management practices.	Implemented

#1 Operating Plan

The Plant and Facilities department has formally documented its operating plan as part of the Board's overarching system operating plan. The department has documented its goals, timelines, performance indicator and responsible individual(s) for each goal. The operating plan is reviewed regularly and formally refreshed at least once a year.

As part of the operating plan, the department has also documented a detailed profile of its services and responsibilities. The profile is useful in communicating the department's vision and goals effectively to other stakeholders within the school board.

#2 Green Clean Program

The Facilities department has reviewed the Ministry's Green Clean Program Resource Guide and has already implemented many of the suggestions from the guide. The department has also attended Ministry training sessions. As recommended by the Green Clean Program Resource Guide, the Facilities department established a Green Clean Working Group comprised of representatives from procurement, facilities, business services, and the union(s). Executive Council and the Board of Trustees are also involved to support the program.

The Board plans to develop a formal green clean program policy statement that will include a clear commitment to implementing a green clean program across all schools; provide positive endorsement of green clean practices; outline the roles and responsibilities at a high level; and establish a mechanism by which to evaluate progress and outcomes.

The Facilities department is currently developing a plan that integrates sustainable environmental practices into each of the school board's operational services.

The school board should continue with the current green clean efforts underway and finalize the green clean policy statement to support their formal green clean program.

#3 Energy Management Plan

A formal draft Energy Management Plan has been developed and an administrative procedure has been established to guide the implementation of the plan. The plan is

structured so that the school board operates its facilities within the parameters of the green energy act and in a manner that is in line with best practices of other provincial institutions.

The school board has conducted a comprehensive energy audit program and has analyzed and summarized the results of the detailed building energy audits. The Facilities department is now in the process of prioritizing upgrades with the most realistic energy reduction paybacks. The department is also working collaboratively on potential upgrades through RECAPP and SFIS.

The school board should finalize their multi-year energy management plan which would incorporate quantifiable measures and the tools to monitor and manage the plan. Once the plan is established, management should provide formal annual reporting on the conservation savings achieved against the plan to senior management and the Board.

#4 Energy Management Reporting

The Facilities department reports energy management progress on a monthly basis to the Board with project updates. Major initiatives and highlights are illustrated and communicated on the school board's external website.

The department also provides a detailed energy management presentation at the Board's request on an annual basis, similar to the School Renewal and Capital Projects presentations. These reports are shared with local schools for their information.

Once the energy management plan has been finalized and approved by the Board of Trustees, management should provide formal annual reporting on the energy conservation savings achieved against the plan.

#5 Environmental Policy

The Board has developed an environmental education statement that promotes environmental literacy and environmentally responsible management practices.

The policy statement indicates that the Board "is committed to providing leadership and direction for the protection and conservation of the environment. In order to promote and sustain environmentally responsible practices in terms of both learners and employees, the Catholic District School Board of Eastern Ontario will comply with all legislation related to the preservation of the environment and will continually demonstrate, by attitude and example, that care of the earth and concern for potential detrimental effects on the environment are integral parts of every function of the Board."

7. School Board Adoption of New Leading Practices

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

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

Governance and School Board Administration

New Leading Practice	Adopted?
The governance model reflects the roles and responsibilities mandated by the Student Achievement and School Board Governance Act, Bill 177.	Yes

After a thorough review process, the school board has updated its governance model to ensure that it reflects the roles and responsibilities mandated by Bill 177. The Director of Education worked collaboratively with the Board to review roles and responsibilities of trustees and school board administration to ensure alignment with Bill 177.

HR Management and School Staffing/Allocation

New Leading Practice	Adopted?
Trustees do not sit on hiring panels (exception hiring the director of education) but provide policies to govern staffing and recruitment.	Yes
Processes are in place to identify and remove discriminatory biases and systemic barriers in staff recruitment, selection, hiring, mentoring, promotion and succession planning processes. The school board conducts employment system reviews and works towards broadening the diversity of recruitment pools.	Yes
Trustees provide the school board's policy and priority framework within which bargaining takes place.	Yes

Trustees currently restrict their hiring decisions to the hiring of the Director of Education. Trustees currently do not participate in the hiring panels for the recruitment of Supervising Officers or other school board staff.

The school board has a formal policy on equity and inclusive education which states that *“the Board and its staff are committed to the elimination of discrimination as outlined in Ontario’s Equity and Inclusive Education Strategy and the Ontario Ministry of Education (the “Ministry”) Policy/Program Memorandum No. 119, in a manner which is consistent with the exercise of the Board’s denominational rights under section 93 of the Constitution Act, 1982 and as recognized*

at section 19 of the Ontario Human Rights Code.” The policy is supported by processes for implementation as well as policies and procedures.

The Board of Trustees provides the school board with a policy and priority framework within which bargaining takes place. In previous negotiations, trustee representatives were present at bargaining sessions. The Board is moving towards a new model in which individual Trustees no longer directly participate in collective agreement negotiation sessions.

Financial Management

New Leading Practice	Adopted?
The established policies and procedures that govern all aspects of supply chain management, including both planned (recurring) and unplanned (non-recurring/emergency purchases, comply with the Supply Chain Guideline (SCG) v.1.0.	Yes
In line with the SCG, purchasing authorization levels are commensurate to job roles and responsibilities, and are monitored for compliance by a supervisor or department head.	Yes

The school board is in compliance with SCG v1.0 and is prepared to make further amendments to its supply chain policies, procedures and processes to ensure compliance to the new Broader Public Sector (BPS) Procurement Directive, released in April 2011.

Senior administration reported that all purchasing authorization levels are commensurate to job roles and responsibilities, and are monitored for compliance by a supervisor or department head.

Operations and Facilities Management

New Leading Practice	Adopted?
The school board has an approved facility partnership policy.	Yes
A Project Manager is appointed to oversee all aspects of the project including monitoring the budget and project timelines and ensuring management processes are in place for issues such as change orders and other internal approvals. This includes periodic project status updates and post-construction project evaluation.	Yes
An independent Cost Consultant is retained by the school board to review the design, provide objective costing analysis and advice, and report to the school board on options to ensure that the proposed capital expenditure is within the approved budget, prior to tendering a project.	Yes

The school board has a Facility Partnership Policy which addresses facility partnerships at the school board. However, the school board has relatively scarce surplus space and there are not a lot of opportunities for facility partnerships.

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

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

Appendix A – Selection of Recommendations

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

Governance and School Board Administration

Ref.	Recommendation	Follow-up Yes/No	Criteria
1.	Using its multi-year strategic plan as a framework, the school board should develop an annual board-wide operating plan. The annual operating plan should be aligned with the strategic plan, incorporate both academic and non-academic departments, and contain goals that are specific, measurable, achievable, relevant, and timely.	Yes	SP
2.	The school board should establish a formal policy review schedule to ensure that all policies are reviewed periodically.	Yes	AR2
3.	The school board should continue to align its leadership development programs and activities with the Ministry leadership initiatives. It should develop a formal Succession and Talent Development Plan in line with the Leadership Succession Planning and Talent Development Ministry Expectations and Implementation Continuum.	Yes	NLP

HR Management and School Staffing/Allocation

Ref.	Recommendation	Follow-up Yes/No	Criteria
4.	The HR department's annual planning should build on the information contained in the department profile to create an annual departmental operating plan. The plan should reflect specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.	Yes	SP
5.	Management should finalize establishing a comprehensive attendance support program.	Yes	TAO
6.	Management should conduct independent compliance audits of the school board's insurance carrier to ensure adherence to the benefit plan's terms and conditions.	Yes	NLP

Financial Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
7.	The Finance department's annual planning should build on the information contained in the profile and establish specific and measurable targets and indicators and assign responsibilities and timelines.	Yes	SP
8.	Management should consider enhancing the process of reporting on the school board's budget risks using the format suggested in section 4.2 of this report. The documentation of such information on a periodic and ongoing basis would give reviewers a better understanding of the school board's budget risks.	Yes	NLP
9.	Management should finalize the development of interim financial reporting template and provide periodic reports to the Board.	Yes	AR3
10.	Management should establish an internal audit function giving due consideration to the new Ministry's direction on internal audit.	Yes	NLP
11.	Management and the board of trustees should consider establishing an audit committee that includes external advisors in accordance with the Ministry's emerging direction on internal audit.	Yes	NLP

School Operations and Facilities Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
12.	The Plant and Maintenance department's annual planning should build on the information contained in the department profile,	Yes	SP

Ref.	Recommendation	Follow-up Yes/No	Criteria
	establish specific and measurable targets and indicators, and assign responsibilities and timelines for key activities.		
13.	The school board should review the Ministry's Green Clean Program Resource Guide and use the guide to develop a formal green clean program as part of its overarching Education Environmental Policy.	Yes	NLP
14.	Using the results of the energy audits, the school board should establish a multi-year energy management plan that incorporates quantifiable measures and the tools to monitor and manage the plan. In line with the Green Energy Act, 2009, energy management planning should include the development of policies, guidelines, goals (conservation targets), and priorities for energy management and resource conservation. The plan should include short-term and long-term opportunities with milestones, roles, responsibilities and budgets with a process for ensuring community support.	Yes	TAO
15.	Once the energy management plan is established, management should provide formal annual reporting on the energy conservation savings achieved against the plan.	Yes	TAO
16.	The school board should develop an overarching environmental policy that would provide framework for its activities in the area of environmental education and responsible management practices.	Yes	NLP