

**Ministry of Education**

Conseil scolaire Viamonde (Conseil  
scolaire de district du Centre Sud-  
Ouest)  
Follow-up Report to the Operational  
Review

**October 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 to 18 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 third and fourth editions of the Operational Review Guide. These were not part of the original review process.

## **2. Status and Implementation Update**

### **Introduction**

The Conseil scolaire Viamonde (Conseil scolaire de district du Centre Sud-Ouest) Operational Review follow-up took place on May 30, 2011, which was approximately 18 months after the release of the initial Operational Review report. The Deloitte Operational Review team conducted a teleconference with the Director of Education.

### **Summary of Recommendation Status**

The school board has made some progress in implementing the recommendations since the completion of its original Operational Review in September 2009. Of particular note are the steps taken to develop a comprehensive energy management plan. The department began its work by doing an audit of the entire school board's consumption and energy usage to see where the most energy was being used. Once the targets for the plan have been set, the school board and trustees should review them on an annual basis.

The original report had 25 recommendations. The Operational Review team focused on 13 of the recommendations in the follow-up review. Ten of the recommendations were from the 12 areas of opportunity identified across the sector in the 2008 and 2009 sector reports; three related to strategic planning; six were identified with having a positive return on investment; and three concerned specific areas of risks. The selected recommendations and the corresponding criteria are listed in Appendix A.

Overall, the school board's senior administration has implemented or made some progress on the majority of the recommendations chosen for follow-up.

The school board reported that the Operational Review process was a positive experience. Management reported that they decided not to share the report with the public as it dealt with operational matters only.

### 3. Governance and School Board Administration

#### #1 Development of the School Board's Policy Review Cycle

Operational Review Recommendation	Implementation Update
The board should consider establishing a timetable for policy review to ensure the periodic review of policy in all functional areas. This could include the establishment of a committee responsible for policy to determine which policies require review or which should be developed.	Complete

#### #2 Development of a Formal Succession Plan

Operational Review Recommendation	Implementation Update
The board should work towards establishing a formal succession plan for its senior management, in order to ensure that initiatives previously undertaken by the board are continued.	In Progress

#### #1 Development of the School Board's Policy Review Cycle

Management recognized the importance of developing a policy review cycle and has developed a list of policies to be reviewed by the Board. The formal policy review cycle will begin in September 2011. The school board is encouraged to ensure that all policies are reviewed on a 3 year cycle.

#### #2 Development of a Formal Succession Plan

Management recognized the importance of succession planning and created a formal succession plan for superintendents on May 28, 2011 as a first step towards developing a plan for all senior management positions. In addition, each superintendent has developed personal succession plans which are tailored to the knowledge requirements and needs of the position. For example, the Superintendent of Business (SBO) has created a plan whereby the one staff member currently being trained to take over the role is participating in specific educational courses at the University of Guelph to ensure they have the knowledge set required to take on the position of SBO.

The school board has currently hired a consultant to provide additional suggestions on developing a formal succession plan for all senior management. The school board is encouraged to work on creating a formal succession plan that includes both academic and non-academic staff in key leadership positions.

## 4. Human Resource Management and School Staffing/Allocations

### #1 Development of an employee evaluation/performance system for all staff

Operational Review Recommendation	Implementation Update
HR management should develop policies and procedures for an employee evaluation/performance system for all staff.	In Progress

### #2 Attendance Management Processes/Programs

Operational Review Recommendation	Implementation Update
The HR department should develop a comprehensive attendance management program, with policies and procedures for specific categories of absenteeism. This important initiative will provide management with a consistent and structured approach to improve attendance, by engaging in positive reinforcement with employees and adopting standardized practices across all employee groups.	In Progress

### #3 Management of Board's Benefit Plans

Operational Review Recommendation	Implementation Update
HR management should periodically conduct independent compliance audits of the board's insurance carrier (management services only), which manages the processing of medical and dental claims, to ensure adherence to the benefit plan's terms and conditions.	Complete

### #1 Development of an employee evaluation/performance system for all staff

Management is working towards developing policies and procedures for an employee evaluation and performance system for all staff. Management is currently investigating the advantages of having an automated employee evaluation and performance system which would be accessible on-line for staff and their supervisors. The school board reported that they plan to have a system in place by June 2012. The school board is encouraged to continue in its implementation of this system.

### #2 Attendance Support

Management is working towards developing an attendance support program to help track attendance and disability management and is currently working with School Boards' Cooperative Inc. on a formal action plan. The school board also reported that

they are working with the other French boards to develop a program through SAP to track absences. The school board foresees this being in place for the 2011-12 school year.

The school board reported that all absences great than 5 days trigger a phone call from human resources department. The school board also reported that follow-ups on extended absences are performed by an outside firm.

The department should continue in its efforts to develop a comprehensive attendance support program, including policies and procedures to address specific categories of absenteeism.

### **#3 Management of Board's Benefit Plans**

The school board reported that this process has been complete through a project completed with the assistance of all 12 French school boards. The Director reported that the school boards worked collaboratively within their internal HR departments to verify the work done by the external service provider on behalf of all 12 French boards.

## 5. Financial Management

### #1 Internal Audit Function

Operational Review Recommendation	Implementation Update
<p>Management should consider formalizing an internal audit function. This would include a broader audit of financial and management controls and adherence to board policies.</p> <p>Management could start by identifying options for the mandate and scope of this function and the estimated cost for each option.</p>	Complete

### #2 Audit Committee

Operational Review Recommendation	Implementation Update
<p>Management and the board of trustees should consider including external advisors to contribute to the effectiveness of the finance committee with a mandate to conduct internal auditing.</p>	Complete

### #3 Supplier Portals

Operational Review Recommendation	Implementation Update
<p>Management should consider implementing an electronic supplier interface for ordering, processing and payment, including the use of supplier portals.</p>	Complete

### #1 Internal Audit Function

With the release of the 2009-10 Grants for Student Needs (GSN), the Ministry announced funding to establish audit committees and internal audit functions. Since the initial announcement of this funding, the Ministry has developed a number of audit function supports including a regional audit initiative. The school board is participating in this initiative, which provides funding for some dedicated internal audit staff for the eight regions in the province, in line with the new Audit Committee Regulation. All of the 12 French-language school boards are a part of the same region.

The Audit Committee Regulation came into effect in September 2010 and required the establishment of audit committees in school boards by January 31, 2011. The regulation sets out the following major aspects:

- appointment process for members

- requirement for external member participation
- term of appointment
- duties and powers of the committee
- reporting requirements
- deadline for the first audit committee meeting (March 31, 2011)

As part of this initiative, a regional internal audit manager is selected and will submit a summary of the audit plan (current year work schedule and multi-year plan), staffing plan and budget for the following fiscal year to the Director of Education, the Senior Business Official and audit committee of the Board.

Management indicated that it is currently participating and closely monitoring the Ministry's direction regarding the provision of internal audit services on a regional shared services model, in conjunction with several other French-language school boards.

## **#2 Audit Committee**

The school board reported that they have recruited two external members to their audit committee and these individuals have already been formally appointed to the committee. The school board should continue to become familiar with the new Audit Committee Regulation and the Ministry's internal audit initiative, including the establishment of regional internal audit teams and the development of a risk assessment to establish priority areas for internal audit activities. The school board should also work with the regional audit team to ensure annual audit plans are clearly documented. Audit report recommendations should be followed up and acted upon by management. Audit plans should also be approved by the audit committee.

## **#3 Supplier Portals**

The school board currently uses electronic supplier interfaces for ordering, processing and payments. However, the school board does not use any supplier portals. The school board reported that the Ontario Education Collaborative Marketplace (OECM) had attempted to pursue implementing the use of supplier portals. However, this initiative was discarded given the significant risks and costs involved. The school board is encouraged to investigate the use of supplier portals, where feasible.

## 6. School Operations and Facilities Management

### #1 Development of an Annual Plan

Operational Review Recommendation	Implementation Update
Management should consider ensuring that the department's goals and priorities are documented in an annual department plan that is aligned to the board's annual improvement plan accessible by key stakeholders. The plan should incorporate measurable targets, specific timelines, and identified accountability.	In Progress

### #2 Work Order System

Operational Review Recommendation	Implementation Update
Management should continue its initiatives to search for a new work orders system that would streamline the management, distribution, monitoring and reporting of work orders related to the repair and general maintenance of facilities.	In Progress

### #3 Energy Management Plan

Operational Review Recommendation	Implementation Update
The school board should establish a multi-year energy management plan that determines suitable objectives for reducing consumption.	Complete

### #4 Consolidated Billing

Operational Review Recommendation	Implementation Update
Management should ask utility companies to provide consolidated billing in an electronic format. This would support more efficient monitoring and forecasting of energy consumption and reduce the workload of the accounts payable department.	Not In Progress

## #5 Tracking and Reporting Energy Conservation

Operational Review Recommendation	Implementation Update
The board should ensure that they have put in place mechanisms to monitor consumption and energy costs, in order to create periodic reports for schools, the executive committee, and trustees.	In Progress

### #1 Development of an Annual Plan

The department does not currently have an annual plan in place for the facilities department. Instead, the school board prepares a report which provides recommendations to the Executive Committee on multi-year departmental projects and priorities such as regions without service to target or regions in need of new schools, which are then presented to the Board of Trustees on an as-needed basis.

The school board has also established a maintenance and prevention program which provides guidance to the school board when determining its priorities for the upcoming year. Projects are selected based on budget allocations and the year's priorities and are presented to the Board of Trustees for approval.

### #2 Work Order System

The school board is currently working with an external provider to develop an automatic work order system to replace the current one which is labour intensive and requires manual entry. The school board reported that this will help them ensure they are better integrated into their SAP system. Management reported that a system will be in place by the end of 2012.

### #3 Energy Management Plan

The department has created a system-wide, multi-year energy management plan, with appropriate consumption reduction targets. The department began its work by doing a consumption audit of the entire school board to see where the most energy was being used. The school board reported that this exercise was also useful in understanding the quantifiable benefits of moving forward with specific initiatives such as eco-energy schools. Each year, the school board and trustees reviews its targets.

### #4 Consolidated Billing

The school board currently receives all of its utility bills by mail. The school board reported that they have no plans to move forward with this recommendation given their geographical footprint.

The school board is encouraged to investigate the benefits of consolidated billing in an electronic format for all its sites and facilities from its utility providers, where feasible. This would support more efficient monitoring and forecasting of energy consumption and reduce the workload of the accounts payable staff.

## **#5 Tracking and Reporting Energy Conservation**

The school board reported that they currently have a system to track energy consumption in all individual schools. However to date, these reports have not been presented to the Board but the school board plans on reporting this information in the 2011-12 school year. This information should also be shared with individual schools and the executive committee or senior management to show progress on specific energy saving initiatives and any consumption reductions.

## 7. School Board Adoption of New Leading Practices

The following leading practices were added or amended for the third and fourth editions of the Operational Review Guide that were 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 2009 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 school boards demonstrate adoption of these practices.

### Governance and School Board Administration

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

The school board has implemented this leading practice. The school board reported that Bill 177 will have a direct impact on all policies that are in place and will require additional training and education for all new and re-elected trustees as the new requirements will require a substantial culture change in how school boards operates.

The school board has conducted an orientation session for new and re-elected trustees to help them better understand their roles in light of the new Bill 177 requirements. .

### HR Management and School Staffing/Allocation

New Leading Practice	Adopted?
The school board maintains appropriate process and systems to monitor staff attendance on a timely basis.	In progress
Trustees do not sit on hiring panels (exception hiring the director of education) but provide policies to govern staffing and recruitment.	In progress
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.	In Progress
Trustees provide the school board's policy and priority framework within which bargaining takes place.	Yes

The school board has reported that they are working with the other French boards to develop a program through SAP to track absences and allow for the monitoring of staff

attendance on a timely basis. The school board foresees a roll-out of this attendance support system taking place in the 2011-12 school year. The school board should continue in its effort and ensure that appropriate processes, procedures and policies are in place to support the new attendance support system prior to the system roll-out and finalize the implementation of the system.

The school board reported that trustees currently sit on their hiring committees. However, the school board is in the progress of changing this practice through trustee orientation and training to ensure that trustees are aware of the new requirements in line with Bill 177. In addition, the Director of Education should review existing practices and the composition of interview panels, and develop formal hiring policies and procedures to clarify the roles of trustees and school board staff in hiring and recruitment. Trustees should provide strategic policies to govern staffing and recruitment. They should not sit on hiring panels, with the exception of the hiring of the Director of Education.

The school board has a policy on discrimination and harassment in place that ensures the selection and hiring of staff is non-discriminatory.

The school board has measures in place to obtain trustee input and feedback on school board priorities during the labour negotiation of various collective bargaining agreements. For instance, before each negotiation, senior administration gets a clear mandate from the Board of Trustees on important negotiation issues. Provincial priorities such as joint purchasing initiatives are also identified by the 12 French-language boards through various groups and associations while the local school board priorities are identified by senior management and subsequently validated and approved by the Board.

## Financial Management

New Leading Practice	Adopted?
Management ensures adequate controls are in place to safeguard non-grant revenue and coordinate the annual reporting of revenues and expenditures from all sources.	Yes
Approved procurement policies clearly outline circumstances under which the board will use competitive versus non- competitive procurement methods.	Yes
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 has ensured that adequate measures are in place by senior administration to safeguard non-grant revenues. The school board reported that this has been in place for a number of years.

The school board has reported that they are in compliance with all aspects of the Supply Chain Guideline (SCG) recommendations. The school board has also established approved procurement policies that clearly outline circumstances under which the board will use competitive versus non-competitive procurement methods.

In addition, purchasing authorization levels are commensurate to job roles and responsibilities, and are monitored for compliance by a supervisor or department head. The new policy can be found on the school board's public website.

## Operations and Facilities Management

New Leading Practice	Adopted?
The school board has implemented a formal green clean program as part of its overarching Environmental Education Policy.	Yes
Develop, implement and monitor an occupational health and safety strategy and/or plan that reflect the school board's occupational health and safety policies and administrative procedures and ensure the school board is in compliance with associated occupational health and safety statutory requirements.	In Progress
Develop, implement and monitor a security strategy and/or plan that reflects the board's security and student safety policies and administrative procedures and ensures the board is in compliance with statutory/policy security requirements.	In Progress
Develop, implement and monitor a health strategy and/or plan that reflect the board's health policies and procedures and ensures the school board is in compliance with statutory health requirements.	No
In constructing, acquiring, operating and managing school facilities, the school board is guided by the principles outlined in the <i>Ontario Green Energy Act, 2009</i>	Yes
The school board has an approved facility partnership policy.	No
A Project Manager is appointed to oversee all aspects of the project including monitoring the budget and project timelines and ensuring management processes are in place for issues such as change orders and other internal approvals. This includes periodic project status updates and post-construction project evaluation.	Yes
An independent Cost Consultant is retained by the school board to review the design, provide objective costing analysis and advice, and report to the school board on options to ensure that the proposed capital expenditure is within the approved budget, prior to tendering a project.	Yes
Management gives full consideration to the use of available school space in their local communities before proceeding to build, purchase or lease other spaces.	Yes

The school board reported that it is making progress on the leading practices under operations and facilities management. For example, the school board currently uses green cleaning products in its school and facilities and has formed a committee to oversee a formal green clean program.

The school board has an Occupational Health and Safety (OHS) program which has been in effect for several years. The school board has also developed a number of policies to support the program. In addition to its current program and policies, the school board is in the process of developing an occupational health and safety strategy. The intent is to develop a multi-year OHS plan that consolidates all of the initiatives aimed at promoting health and safety and strengthening staff compliance with associated statutory requirements.

The school board is currently developing a security strategy to ensure it is in line with Bill 168 and 157. The school board should continue in its development of a security strategy and/or plan which would reflect the board's security and student safety policies and administrative procedures and ensures the board is in compliance with statutory/policy security requirements for both students and staff.

The school board has not created a health strategy and/or plan. Having such a strategy and/or plan in place would allow the school board to address the promotion of overall health and wellness of both students and all employee groups. A health strategy document could contain the following elements:

- Scope - The scope of the document should include wellness and health enhancing strategies that focus on living a healthy life-style and maintaining a work-life balance.
- Vision, Mission and Values - a description of what the school board intends to achieve in the long-term and how it intends to achieve that long-term vision through a clearly worded mission statement.
- Goals and Objectives - A time-based series of activities that contain clear goals and objectives, assigned to appropriate individuals, and have the ability to be tracked for performance and results.
- Annual Implementation Roadmap - a detailed inventory of all events, tasks and activities that will be conducted for the upcoming school year that will help achieve the health strategy vision.

Management closely monitors the *Ontario Green Energy Act* and ensures its principles are used in the board's construction, acquisition, operation and management of school facilities. The board mentioned that there is currently no construction or projects

underway and the school board does not plan to acquire any new buildings in the immediate future.

Management does not have a facility partnership policy in place and reported it has not been created due to a lack of time and resources. The school board should develop a facility partnership policy and supporting procedures in line with Ministry requirements. The memorandum to introduce the Facility Partnerships Guideline, the Facility Partnerships Guideline and the Highlights of the *Education Act* relevant to facility partnerships could be found in the links below.

[http://faab.edu.gov.on.ca/Memos/B2010/B\\_1.pdf](http://faab.edu.gov.on.ca/Memos/B2010/B_1.pdf),

[http://faab.edu.gov.on.ca/Memos/B2010/B\\_%201%20Attach%20-%20Facility%20Partnerships%20Guideline.pdf](http://faab.edu.gov.on.ca/Memos/B2010/B_%201%20Attach%20-%20Facility%20Partnerships%20Guideline.pdf), and

[http://faab.edu.gov.on.ca/Memos/B2010/B\\_%201%20Attach%20-%20Appendix%20A.pdf](http://faab.edu.gov.on.ca/Memos/B2010/B_%201%20Attach%20-%20Appendix%20A.pdf)

The school board reported that they hire project managers 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 on future projects.

Management also hires an independent cost consultant 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.

Management reported they give full consideration to the use of available school space in their local communities before proceeding to build, purchase or lease other spaces.

## 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 4 through the Third Edition of the Operational Review Guide.

### Governance and School Board Administration

Ref.	Recommendation	Follow-up Yes/No	Criteria
1.	The board should consider establishing a timetable for policy review to ensure the periodic review of policy in all functional areas. This could include the establishment of a committee responsible for policy to determine which policies require review or which should be developed.	Yes	SP / TAO
2.	The board should work towards establishing a formal succession plan for its senior management, in order to ensure that initiatives previously undertaken by the board are continued.	Yes	SP/TA O

### HR Management and School Staffing/Allocation

Ref.	Recommendation	Follow-up Yes/No	Criteria
3.	The board should consider establishing an annual policy awareness-training plan for principals, custodians, and support staff.	No	

Ref.	Recommendation	Follow-up Yes/No	Criteria
4.	HR management should develop policies and procedures for an employee evaluation/performance system for all staff.	Yes	TAO
5.	The HR department should develop a comprehensive attendance management program, with policies and procedures for specific categories of absenteeism. This important initiative will provide management with a consistent and structured approach to improve attendance, by engaging in positive reinforcement with employees and adopting standardized practices across all employee groups.	Yes	TAO/R OI
6.	HR management should periodically conduct independent compliance audits of the board's insurance carrier (management services only), which manages the processing of medical and dental claims, to ensure adherence to the benefit plan's terms and conditions.	Yes	TAO/R OI
7.	Management should consider developing a formal plan for conducting exit interviews. As with staff surveys, these interviews would provide input for HR policy, as well as process and program improvement.	No	

## Financial Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
8.	The board should consider developing an annual training and policy awareness plan for its staff.	No	
9.	The school board should consider formalizing an internal audit function. This would include a broader audit of financial and management controls. Management could start by identifying options for the mandate and scope of this function and the estimated cost for each option.	Yes	TAO/ AR3
10.	Management and the board of trustees should consider formalizing an audit committee that includes external advisors to contribute to the finance audit committee's effectiveness.	Yes	TAO/ AR3
11.	The finance department's management should ensure that letters of recommendation from the auditor be sent to trustees and that the auditor's recommendations are acted on.	No	
12.	Management should consider implementing an electronic supplier interface for ordering, processing and payment, including the use of supplier portals.	Yes	AR3

## School Operations and Facilities Management

Ref.	Recommendation	Follow-up Yes/No	Criteria
13.	Management should consider ensuring that the department's goals and priorities are documented in an annual department plan that is aligned to the board's annual improvement plan accessible by key stakeholders. The plan should incorporate measurable targets, specific timelines, and identified accountability.	Yes	TAO/ SP
14.	The department should consider developing an annual training and policy awareness plan for school board staff.	No	
15.	The board should consider developing a process that ensures compliance with these policies and new legislation.	No	
16.	The board should consider clarifying the roles and responsibilities of department's staff in order to ensure that these roles and responsibilities are well documented.	No	
17.	Management, with participation of departmental managers, should consider formalizing the development process of a training plan for department staff.	No	
18.	Management should continue its initiatives to search for a new work orders system that would streamline the management, distribution, monitoring and reporting of work orders related to the repair and general maintenance of facilities.	Yes	ROI
19.	The school board should consider developing the documentation that describes cleaning standards for schools and develop a standard set of processes and tools to monitor, manage, and report on results.	No	
20.	The school board should establish a multi-year energy management plan that determines suitable objectives for reducing consumption.	Yes	ROI/T AO
21.	The board should ensure that they have put in place mechanisms to monitor consumption and energy costs, in order to create periodic reports for schools, the executive committee, and trustees.	Yes	ROI/T AO
22.	Management should ask utility companies to provide consolidated billing in an electronic format. This would support more efficient monitoring and forecasting of energy consumption and reduce the workload of the accounts payable department.	Yes	ROI
23.	As part of energy conservation planning, management should examine purchasing practices to ensure that they support each school's energy conservation objectives.	No	

Ref.	Recommendation	Follow-up Yes/No	Criteria
24.	The board is encouraged to develop a clear policy and a procedure for sending vital information to parents in emergency situations.	No	
25.	The board should establish a regularly updated list of suppliers, including suppliers of professional services, to encourage time savings.	No	