



Canadian Educational  
Resources Council

# Aligning Results with Intentions: Funding for Learning Resources in Ontario

September 2002

*A Brief Submitted to Ontario's Education  
Equality Task Force*

"We have set higher academic standards for our children, so *it is vital that students have the books and resources they need to reach those standards.*"

(Premier Ernie Eves, April 17, 2002)

## **The Canadian Educational Resources Council:**

The Canadian Educational Resources Council (CERC) represents the major Canadian educational publishers, several of which have been serving Canada's schools for over a century.

Through CERC, the learning resources industry works co-operatively with educational policy makers in an effort to ensure that Canadian classrooms are supplied with the finest educational resources possible. Our industry enjoys positive relationships with

Ministries of Education and Training across Canada, relationships built on consultation, collaboration and an ongoing commitment to best practices in education, high quality and timely resource delivery, and equity.

Over the years, our council has produced several documents alerting Canada's educational jurisdictions to key issues affecting their students' access to high quality learning resources. (Copies of two of these documents are appended for the Task Force's reference). In December 1999, our report, "*Equipping our Classrooms for Tomorrow*" underlined how Canada's major competitors for global markets are spending dramatically more per student, on schoolbooks alone, than Canada spends on all learning resources. Our brochure "*Selecting and Implementing Educational Resources: Best Practices*," based on a review of current North American models, identifies learning resource practices which yield the greatest potential benefit to education systems. Two such practices particularly relevant to today's presentation are:

- *Predictable cycles of curriculum renewal and implementation; and*
- *Dedicated resource funding*

Curriculum change has been a key part of the reform of education in Ontario. The new, rigorous curriculum features clear, grade-by-grade expectations for student learning in all subjects from Kindergarten through grade 12. The rapid pace of transition to this new curriculum has presented challenges for educators, for boards, and for the producers of the new learning resources needed to make this curriculum a reality for students in the classroom.

Our member firms have been actively engaged since 1997 in developing a range of new textbooks to support the implementation of the new Ontario curriculum. We have pushed our teams of writers, editors and other staff extremely hard, on very tight timeframes, in an effort to support the extremely rapid implementation cycle set for this province.

In Ontario's current "*Guidelines for Approval of Textbooks*" the government recognizes the important role that "textbook publishers have in the implementation of the Ontario curriculum." That same recognition is reflected in the comments of Premier Eves who said, on April 17, 2002, "**We have set higher academic standards for our children, so it is vital that students have the books and resources they need to reach those standards.**" Our industry takes these statements at face value, as expressions of a sincere intention on the part of the Ontario Government to acknowledge, and give priority to learning resources as a key component in every student's education program.

#### **CERC's Concern with the Ontario Funding Model:**

*We wish to emphasize for the Task Force that the funding model, in its current form, is not achieving its intention of ensuring that students have the books and resources they need to succeed with the new curriculum.* We offer constructive advice on how this aspect of the funding model needs to be strengthened to achieve the intended results.

We recognize that the mandate and scope of the review being undertaken by the Task Force on Educational Equality is extensive. We understand that you have been asked to consider, among other aspects of the funding formula:

- its effectiveness for distributing funding between different types of boards;
- the structure of cost bench marks in the model; and

- the degree of local expenditure flexibility school boards should have.

Our industry's focus – textbooks and learning resources – is a relatively narrow one within this broader context. Nevertheless, the issue we identify is a critical one and we hope our proposed approach to that issue may be helpful to the Task Force in addressing not only textbook funding but other aspects of your challenge as well.

### **The Funding Model and Learning Resources: Some Facts**

The following data illustrate that much of the funding which the current formula provides for the purchase of textbooks and learning materials does not get spent on textbooks and learning materials:

- The foundation grant component of the current formula **allocates** to boards **\$75 per elementary student** and **\$100 per secondary student** for textbooks and learning materials.
- This **level of allocation** has remained **unchanged** since the inception of the foundation grant.
- This funding has declined as a percentage of the total per-student allocation as other components were added to the foundation grant. In 1998-99, it represented 2.2% of the elementary student foundation grant allocation and 2.5% of the allocation per secondary student. By 2001-02, it had shrunk to 2% of the elementary and 2.3% of the secondary per-student allocation.
- Based on enrolments in Ontario schools, one might reasonably conclude that **if the funds thus allocated had in fact been spent on textbooks and learning materials these allocations would have generated an annual purchase in the order of \$175,000,000.**
- The reality is that spending on textbooks and learning materials in Ontario (exclusive of ministry targeted initiatives) in each of the past three years has amounted to a fraction of that amount.
- **The average annual expenditure on textbooks in Ontario, attributable to the foundation grant funds, has been closer to \$70,000,000 per year, or roughly \$33 per student!\***
- Put another way, **less than 40% of the annual funding** being allocated within the current funding model **for the purpose of acquiring textbooks and learning materials is being used to purchase such resources for students.**

[\*These figures are based on industry-generated statistics which are gathered on a calendar- year basis. Because the impacts of the ministry's targeted funding initiatives for textbooks have straddled school years and calendar years, expenditure data and targeted funding amounts have been averaged over the three calendar years from 1999 to 2001 inclusive.]

### **Learning Resources : An Equitable Basis for Student Success:**

Clearly, in the case of textbooks, **the existing funding model does not result in expenditure patterns that bear any significant relationship to the ministry's stated purpose for allocating these funds.**

In the course of consultations and public hearings, the Task Force is likely to hear arguments, in the name of local flexibility, that there should be little correspondence between ministry allocations and board expenditures. CERC takes no position on what should be the appropriate degree of local flexibility incorporated in the model. Rather, we take the view that a provincially funded education system – regardless of how it provides for local flexibility --needs to incorporate in its funding model, a mechanism which ensures **equitable funding for those elements that are part of every student's program, regardless of where in the province that child attends school.**

In the current funding model, the Foundation Grant component attempts to address this need. To quote the ministry's fact sheet: "The Foundation Grant covers the basic costs of providing an educational program to a student for one school year. It is allocated to district school boards on a per student basis. The Foundation Grant for each student is the same regardless of where a board is located in Ontario."

Textbooks and student learning resources are fundamental to the provision of the educational program for each and every student. This is not simply the view of CERC: it is a view repeatedly expressed by parents, teachers the ministry – and the Premier.

- **Parents** have expressed concerns repeatedly when textbooks are not an evident part of their children's program.
- **Teachers** have issued frequent requests/pleas for student learning resources to help deliver the curriculum.
- The **ministry** has included the "allocation" for these resources in the Foundation Grant component, which is intended to cover basic educational costs.
- The **Premier** himself has made several public statements emphasizing the vital need for textbooks as a support for student learning.

Notwithstanding this widespread recognition of how critically important these learning resources are for student success, we feel compelled to underline for the Task Force's consideration these two related concerns arising from the current funding model:

- Students in Ontario are not being provided, in sufficient quantity, with the textbooks they need to support their learning; and
- Funding that is ostensibly intended to provide students with access to these resources is not being spent on the acquisition of textbooks.

**We believe that the Task Force, through its recommendations, can help ensure that students in Ontario's schools have access to the finest learning resources possible, to assist them in achieving the high standards laid out in the new Ontario curriculum.**

### **How the funding model can ensure student access to appropriate learning resources:**

The reform of Ontario's education system has been characterized by the introduction of **provincial standards**. There are new standards in curriculum content, in testing instruments, and in the provincial funding of education. All of these reforms appear to reflect an intention that students, regardless of where in Ontario they may happen to attend school, are entitled to a consistent and comparable education.

Prior to these reforms, there was a high degree of decentralization in curriculum as well as in funding arrangements. In the absence of a specific provincial curriculum, the elementary grades in particular were approached so differently by boards across the province that it was often difficult for our industry to develop textbooks and learning resources which could serve a broad range of students and teachers. With no province-wide curriculum to guide our development efforts and without a significant level of demand for our resources, circumstances were not conducive to developing a wide range of textbooks for Ontario schools. It was not uncommon for Ontario students in those years (70's and 80's) to go through several grades without ever having had the benefit of a textbook to support their learning.

One might say that the educational reform in Ontario was, in some respects, a response to the concerns of parents at the absence of standards. And, certainly, one focus of that parental concern was the manifest absence of textbooks. Parents wanted to see their children supplied with textbooks for many reasons: some considered a textbook to be evidence that there was a clear plan for their child's learning; others saw a textbook as an assurance that there was, besides the teacher, a material support for their child's learning; many parents regarded textbooks as vehicles through which they themselves could provide the student with help outside of the classroom.

There is no question that the combination of a new, province-wide curriculum with clear expectations for student learning in each grade makes it easier for the developers of learning resources to create student resources that are useable by students across the province. From the earliest days of the curriculum reform our member companies have invested in the development of high quality resources geared to the Ontario curriculum. As noted earlier in this brief, the industry has played an active role in supporting the implementation of the new curriculum by developing learning materials closely matched to the new provincial standards. We believe that the new curriculum requires continued support of this sort. The new secondary curriculum alone includes over 250 different guidelines (courses) that could, arguably warrant a separate textbook. And there remains a great deal of need in the elementary panel for learning resources specifically designed to help students master the content of the new curriculum.

The learning resources industry is poised to continue working with Ontario's educators to address the challenge of filling in the "gaps" -- developing materials that will address student needs in all areas of the new curriculum. Of course, each new learning resource requires significant investment in its development and production. What we, as an industry, require in order to commit to that investment is some assurance of a viable marketplace for the resource. By ensuring that the funding model is refined so as to provide a truly funded marketplace -- one in which there is assurance that the purchase of high quality learning resources will take place -- this Task Force will be instrumental in ensuring that Ontario students have access to the textbooks they need.

### **How the funding model can align expenditure intentions with results:**

In 1997, when our industry began to develop the first of the materials specifically aligned with Ontario's new curriculum, we were persuaded that the province's new funding arrangements – then still “on the drawing board” -- would enable boards to acquire the necessary new resources by allocating funding for textbooks. However, at the time the new formula was first announced, we emphasized that these allocations needed to be specifically **committed to expenditures** on those resources. We predicted then that, without such a commitment or dedication of these funds, the outcome would be what, indeed, four years' experience with the model has shown to be the case. Competing pressures on boards have consumed a significant portion of the funding intended for student learning materials.

As our own figures indicate, of the (roughly) \$83 per student currently being allocated for the purpose through the formula, only \$33 is actually getting spent on textbooks and learning resources. For a sense of the impact of that expenditure shortfall on students, one can look at the *2002 Elementary Tracking Report* released earlier this year by *People for Education*. Their survey illustrates that , across Ontario, the purchase of textbooks over the last four years has certainly fallen well short of placing a textbook in the hands of each student. The report states that “24% of the schools reported **fundraising to pay for textbooks**”.... and that there has been an “11% increase in the number of schools reporting **students must share textbooks**, from 62% in 1997/98 to 69% this year.”

And we must emphasize that this “shortfall” in expenditures on textbooks, this unacceptable set of circumstances in which **more than two thirds of the students are required to share textbooks** and **nearly one quarter of the schools are involved in outside fundraising to purchase textbooks**, occurred over a period during which the ministry had provided an **additional \$100 million, over and above the foundation grant allocations**, specifically for the purchase of elementary textbooks in targeted subject areas. One can only speculate on how much scarcer textbooks would have been without that targeted investment. But please note that the ministry's targeted investments were described as one-time infusions of money to **supplement** the foundation grant funding for textbooks. Even with the supposed “addition” of this funding, total expenditures on textbooks in Ontario have been consistently less than the amount allocated in the foundation grant alone. **Unless the necessary and appropriate changes are made to “ earmark” the learning resource funds provided through the foundation grants, there is every reason to believe that Ontario pupils' access to textbooks will decline in the years ahead.**

#### **CERC's Recommendation to the Task Force:**

As we have noted, among the practices employed by various jurisdictions for selecting and implementing learning resources, one which provides very significant benefits to students is the provision of **dedicated** resource funding. It ensures that course offerings are viable, provides teachers and students with the materials required for success, and establishes clear markets and sound bases for business decision making on the part of learning resource developers.

**Whatever else is done to improve on the current funding model, steps must be taken to see that it includes a component which ensures that students get the learning resources they need and deserve.** The best way to accomplish this, we believe is to **refine the foundation grant component of the funding model in a manner that ensures that funding for those elements which are common in the education program for all students -- and which, by their nature, vary little in cost from one board to another -- are provided through mechanisms that are tightly enveloped, or dedicated.** We trust the Task Force is persuaded, as we are, that textbooks are prime examples of such an element – required by all students, regardless of the age of their school building, the size of their class, or the distance they must travel to and from the school.

The Task force will hear arguments that the current formula has worked to the disadvantage of large boards, which had higher per-pupil spending prior to 1997 than is provided by the current formula. Undoubtedly, several components involved in delivering education **are** likely to vary in cost for geographic and demographic reasons – and indeed a major focus of your work will involve consideration of how some components of the funding model may need adjusting to take those variations into account.

We are **not** suggesting that the answers to the very real issues associated with the current provincial funding model lie in scrapping the formulaic approach to the distribution of education funds. It may well be that an increase in the overall amount being provided to boards will need to be part of the answer to the range of issues being brought to your attention. But, when it comes to making the funding formula a truly effective mechanism for supporting schools in acquiring the needed learning resources, we hope the Task Force will share our view that what is needed – i.e., dedication, or “earmarking” of the existing funding -- amounts to a crucial “adjustment” to the funding model rather than a radical change.

Textbooks and learning materials are crucial in the delivery of the education program to every child. As one of the elements that costs the same whether the child is a pupil in a small or large, urban or rural board, the provision for textbooks arguably requires a consistent level of funding. Indeed, as we have noted, the current foundation envelope **allocation** already implies as much. But it is not enough merely to **allocate** the funding in that way: This component is so fundamental to each student’s education that it only makes sense to **protect** it from erosion by providing it as an **accountable investment** to be spent on the items for which it was allocated.

**CERC recommends that the formula be modified so that the funds provided for learning resources are specifically dedicated for expenditure on such resources.** This will benefit all concerned by:

- Allowing boards, together with the ministry, to ensure that high quality learning resources are available for all students;
- Allowing rational planning to take place concerning those subjects, courses, and programs that are to receive priority, over time, for renewal/replacement /change of textbooks;
- Providing parents with the comfort, assurance, and visible evidence that their children are equipped with the finest tools to assist them in the learning process.