



PERMANENT CLOSING OF A SCHOOL

Responsibility:	<i>Executive Superintendent of Education</i>
Legal References:	<i>Education Act S. 5, 19, 20</i>
Related References:	<i>Administrative Procedure 4010 – Staff Change of Location or Retirement; IT-04-01 Computer Access Request Form</i>

1. Preamble

The procedures that follow provide the guidelines and expectations after the Board makes a decision to permanently close a school. The appropriate method of dealing with office index cards, Ontario Student Records, Student Information, business/financial services and information technology services are outlined. A principal checklist is also provided.

2. General

- 2.1 The following identifies the issues and procedures required for the permanent closing of a school. If you have any questions, please contact the appropriate people who are available to help you:
- 2.1.1 Manager of Corporate Services and Records;
 - 2.1.2 Manager of Information Technology;
 - 2.1.3 Manager of Plant Maintenance;
 - 2.1.4 Manager of Purchasing Services;
 - 2.1.5 Superintendent of Instruction.

3. Office Index Cards

- 3.1 Pre Current (Previous) School Year
- 3.1.1 Sort the office index cards in alphabetical order.
 - 3.1.2 Place the office index cards, as a separate package, in the Pre Current (Previous) School Year box of OSR folders that are being transferred to the Records Centre.
- 3.2 Current School Year
- 3.2.1 Update the office index cards indicating the date of transfer, the destination of the student, and the date on which the OSR folder is transferred.
 - 3.2.2 Sort the office index cards alphabetically according to the following categories:
 - students transferring to another school within the WRDSB;
 - students who are moving out of Waterloo Region;
 - students who are retired (i.e. out-of-province).
 - 3.2.3 Place all the office index cards, in their appropriate groupings, in the Current School Year box of OSR folders that are being transferred to the Records Centre.

4. Ontario Student Records

- 4.1 Pre Current (Previous) School Year – Transfer of OSR Folders to Microfilming
- 4.1.1 Order yellow microfilm file storage boxes from the Microfilm Department.
 - 4.1.2 Sort the OSR Folders in alphabetical order by school year.
 - 4.1.3 Generate box label using the Records Management System program – one label must be generated for each box of records being transferred.
 - 4.1.4 Have the transfer authorized by the principal or designate who will manually initial the label.
 - 4.1.5 Affix the label(s) to box(es).

- 4.1.6 Produce and send with the box(es) a Shipping Report of the box(es) being sent to Microfilming – the Shipping Report can be produced through the Reports section of the Records Management System.
- 4.1.7 Complete a “Request for Courier” form and send it to the Purchasing Department by April 30 to have box(es) transferred to Microfilming. The Microfilm Operator will receive the boxes and check them against the accompanying shipping Report.
- 4.2 Current School Year – Transfer of OSR Folders to Record Centre
 - 4.2.1 Make an entry in Part B of each OSR Folder and update Sections D, E, F, G, H and I.
 - 4.2.2 Group the OSR folders as outlined below and sort each group in alphabetical order:
 - students transferring to another school within the WRDSB;
 - students who are moving out of Waterloo Region (i.e. waiting for official request of the OSR folder from parents and receiving principal);
 - retired students (i.e. out-of-province).
 - 4.2.3 Prepare a computer printout for each group with the students listed in alphabetical order.
 - 4.2.4 Forward Group I OSR folders and the computer printout to the receiving schools at the end of June.
 - 4.2.5 Place Group II and Group III OSR folders and all index cards in file storage boxes.
 - 4.2.6 Generate box label using the Records Management System program – one label must be generated for each box of records being transferred.
 - 4.2.7 Sort the OSR folders in alphabetical order.
 - 4.2.8 Have the transfer authorized by the principal or designate who will manually initial the label.
 - 4.2.9 Affix the label(s) to the box(es).
 - 4.2.10 Produce and send with the box(es) a Shipping Report of the box(es) being sent to the Records Centre – the Shipping Report can be produced through the Reports section of the Records Management System.
 - 4.2.11 Complete a “Request for Courier” for and send it to the Purchasing Department by April 30 to have the box(es) transferred to the Records Centre.
 - 4.2.12 Contact the Manager of Corporate Services and Records if you require assistance with this process.

5. Student Information

- 5.1 Student Data System (Reference: Promotion Cycle Checklist)
Complete the following information on the Pre-promotion Checklist:
 - 5.1.1 Contact Person;
 - 5.1.2 Student Address Information;
 - 5.1.3 Probable Change of School;
 - 5.1.4 Out-of-Board Transfers and Retirements.
- 5.2 Special Education
 - 5.2.1 Generate a list of students with special needs (i.e. behavioural or communication) by grade and send to receiving school.
 - 5.2.2 Give recommendations as to program or type of class.

6. Business/Financial Services

- 6.1 Month-end Print-outs (June, July and August)
 - 6.1.1 Monthly print-outs for the months of June, July and August will be sent from the Finance Department directly to the appropriate Superintendent of Instruction.
- 6.2 School Council Funds
 - 6.2.1 Close the bank account for school council funds at the end of the school year, and issue a cheque for any remaining funds to the current school bank account.
 - 6.2.2 Deposit the cheque into the school funds bank account.
 - 6.2.3 Be sure the School Council Chair is aware of this process

- 6.3 School Funds/Student Activity Funds
 - 6.3.1 This bank account should remain open until all year-end transactions have been completed. Any information associated with the bank account received through the mail during the course of the summer will be sent to the principal or designate of the closing school in September by the secretary to the Superintendent of Instruction.
 - 6.3.2 After all transactions have been finalized, disperse any remaining funds to the receiving schools on an agreed-upon basis.
 - 6.3.3 Close the bank account, complete the final *Statement of School Funds* and forward to the Supervisor of Accounting, Financial Services Department.
- 6.4 Waterloo Education Foundation Funds
 - 6.4.1 Review remaining funds in the Waterloo Education Foundation, in consultation with the school council, and transfer the funds to the receiving school(s) in accordance with the terms and conditions of the trust.
- 6.5 Processing of Purchase Orders, Warehouse Requisitions, Petty Cash and Purchase Cards
 - 6.5.1 Complete final ordering for the school in early June.
 - 6.5.2 Should any ordering out of the closing school's operating budget be processed on behalf of the receiving schools, the "Ship To" section on purchase orders and warehouse requisitions must indicate the address of the appropriate receiving school.
 - 6.5.3 Complete the final Petty Cash Statement and Mastercard Statement and, along with all unused cheque stock, submit to Accounting, Financial Services Department, at the end of June.
 - 6.5.4 Return all school-issued P-cards to Accounting, Financial Services Department.
- 6.6 Carry-over of School Operating Funds
 - 6.6.1 Closing school should NOT overspend the school operating budgets.
 - 6.6.2 Transfer remaining funds in school operating budgets to the central account, titled *New Classroom Supplies*.

7. Information Technology Services

- 7.1 Computer
 - 7.1.1 Administrative Computer Files: See AP 4010 of the Administrative Services Procedures Manual for dealing with administrative computer files when users change location or retire.
 - 7.1.2 Complete the ITS Computer Access Request form (IT-04-01) to delete security access to BAS/WIS/SDS, etc. files for the school in June.
 - 7.1.3 Hardware Inventory Deployment
 - An ITS representative will come to the school three months before closing to do an audio-visual and computer inventory.
 - The representative will return the last week of school and/or the first week after the closing date to dismantle and move instructional computers and the audio-visual equipment.
 - The representative will return at a date arranged with the principal to move administrative equipment.
 - The audio-visual and computer equipment will be assigned by ITS, using the inventory of items at the receiving schools, and the county averages and ratios.
- 7.2 Library
 - 7.2.1 Teacher-Librarian/ Principal
 - Announce to staff and students that the library will be closed on an agreed-upon date. The minimum should be three weeks before the closing date.
 - Recall all library materials by the closing date of the library.
 - Invite teacher-librarians from the receiving schools to come one to two weeks before the closing date to "divvy" up the collection.
 - Inform staff to take whatever curriculum documents they want.

- Remind staff to remove all personal items from the computers (i.e. report cards).
- Attempt to pull together the Ministry software in the school. (The Ministry list will be sent from Information Technology Services.) This software will be given to any new schools being built.

7.2.2 Library

- Shipping cartons will be ordered and supplied for library materials. The cartons will be available three weeks before the closing date for the weeded and remaining collection.
- Arrange with ITS for assistance to weed the library collection, stamp the books, discard, pack and remove the boxes from the school on or near the closing date.

7.2.3 Library Services will:

- process the topical/seasonal items for the receiving schools (clean them, remove barcodes, affix new barcodes, add to the school's database and ship to the receiving school);
- assist the receiving schools on a chosen date to weed at their locations if they wish to have a weeding date;
- pack and take away the remaining library materials by the closing date and process them during the summer.

8. Miscellaneous

8.1 Department Binders

- 8.1.1 Return system binders to the originating department.

8.2 Royal Mail

- 8.2.1 Send a list of all staff indicating the new location for September to the appropriate Superintendent of Instruction.
- Mail will be sorted by the mail room staff (i.e. junk mail discarded) and forwarded to the appropriate instructional superintendent's office.
 - The superintendent's secretary will forward the mail to the correct location.

8.3 Assessment Materials

- 8.3.1 Package materials, including EQAO, and label "Confidential". Include school name and year of assessment.
- 8.3.2 Send packages to Assessment and Research, Education Centre.
- 8.3.3 Include a list of students and schools they will be attending in the Fall.
- 8.3.4 The Assessment & Research office will ensure that the results are forwarded to the appropriate school.

8.4 School Memorabilia

- 8.4.1 All school property in the form of:
- school, and/or class pictures (should be identified and dated on back);
 - trophies, banners and flags;
 - bells, gavels, mascots, crests;
 - school stamps, seals;
 - pictures or portraits of past administrators, staff;
 - yearbooks, graduate and staff pictures;
 - special books and/or maps;
 - significant registers (first year, last year);
 - antique furniture or equipment
- must be labelled as accurately as possible.
- 8.4.2 As property of the Waterloo Region District School Board, the memorabilia will be catalogued and forwarded to the library of the school where the students of the closed school have been transferred. The receiving school will be expected to create and maintain a display of the closed school's memorabilia and maintain the collection in its library or other suitable location within the school.

- 8.5 Office/Classroom Furniture, Equipment and Supplies
- 8.5.1 Label all classroom and office furniture and equipment with the present school name and its future destination. Further instructions regarding destination will be provided by Physical Resources personnel.
- 8.5.2 "Weed" and pack consumable texts and supplies. Label the boxes with the present school name and the future destination.
- 8.5.3 The Manager of Information Technology and the Manager of Plant Maintenance will contact the closing school with regard to the procedures for general Furniture & Equipment and Library F&E.
- 8.6 Teachers' Property
- 8.6.1 Request the return of all school property from teachers prior to their leaving in June (equipment, supplies and keys).
- 8.6.2 Label all personal property with the teacher's name and the future school where the teacher has been assigned to teach. Teachers' files, unit materials and personal equipment will be shipped to their new assignment.
- 8.6.3 Personal property that teachers do not wish to have sent to their new assignment, needs to be removed before the end of June

9. Principal Checklist

- 9.1 Once the decision to permanently close your school has been made, the following checklist identifies areas you need to address:
- meet with staff and coach how to talk to students and community;
 - if necessary, talk to the appropriate Superintendent re additional staff support with the June school closing process;
 - call meetings with purchasing, custodial & maintenance, superintendent(s), planning and transportation, records management, grounds, IT to identify issues and set timelines;
 - call meeting of transition team made up of at least a teacher(s), secretary, custodian;
 - contact receiving principals;
 - connect with network of principals who have closed schools;
 - meet with School Council chairs and principals re transition plan;
 - building closure checklist – obtain from Manager of Plant Maintenance & Construction;
 - communicate, communicate, communicate;
 - staff retreat?
- 9.2 You need to develop a plan for each of the following areas:
- kitchen;
 - library materials;
 - computer hardware and software;
 - division of goods to other schools, i.e. blackboards, millwork, etc.;
 - school council "stuff";
 - supply room;
 - contest to distribute school stuff with logos on it;
 - plan for moving;
 - staff lunch on last day;
 - celebrations/activities (including parents):
 - picnics;
 - off-campus trips;
 - parting gifts;
 - closing ceremonies;
 - liaison with new schools.
 - newsletters from receiving school(s) after March Break;
 - ET process – finding "homes" for everyone;
 - enrolment transfer;

- school furniture;
- gym equipment;
- orientation of students at new school;
- plants, shrubs, trees that might be moved to another site.