A Guide to Curriculum Resource Writing Projects

Developed by the
Council of Ontario Drama and Dance Educators

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Part A: Introduction

This guide was created by the Council of Ontario Drama and Dance Educators (CODE). It is provided to assist subject associations in the planning and implementation of curriculum resource writing projects.

Using the collective wisdom gained from previous writing projects, including the 2005 “Think Literacy” Subject-Specific Resources, the 2009 Revised Arts Curriculum Resource project and the 2011 Financial Literacy project, CODE has created this guide for future writing teams to consult when developing new projects. In doing so, we acknowledge the tremendous work and wisdom of the project managers, writers and reviewers who contributed to these important projects.

Overview

This guide contains information and recommendations to aid subject associations in curriculum resource writing projects: initial planning stages, hiring writers and reviewers, training writing teams and publishing finished resources to the web.

Though recommendations are based on best practices gained from previous CODE writing projects, it is important to recognize that each subject association and writing project is unique in its scope and focus. The available time, resources, and personnel needed to administer writing teams are all important factors when planning a curriculum resource writing project. Subject associations should consult their executives and board members as well as their constitutions and by-laws when embarking on a curriculum resource writing project.
Part B: Planning the Writing Project

There is a variety of models for curriculum resource writing. This guide outlines two models: the traditional team model and the collaborative “think tank” model, and their individual advantages and disadvantages.

When considering different models and deciding upon one that best suits the project, consider the following:

What is the scope of the project? What are the expectations around what and how many resources will be produced?
Curriculum resource writing projects may focus on lessons, mini-units, full units or course profiles. Often projects might have a specific focus, such as financial literacy, social justice, critical literacy, or other lenses that must be incorporated into the resources. These factors should be taken into consideration when making a plan. Project managers should also consider the expectations of what is reasonable in terms of number of resources and length of time needed to write them.

How many writers and reviewers are needed?
Having a clear sense of the scope of the project will dictate how writing teams should be organized. A smaller project might be more well-suited to a smaller, “think tank” style approach (see more information on models later in this section) while larger projects may need a team approach, with a lead writer overseeing the creation of many resources.

What is the size of the budget? What are the limitations of the budget? Who will handle the finances?
A comprehensive budget should take into account not only writers’ salaries, but any miscellaneous expenses important to the administration of the project, such as mileage allowances and food costs for training sessions. As well, there must be clear communication between the treasurer of the writing project and the treasurer of the subject association if they are not the same person. For more, see the Budget section of this guide.

How will the writing be done? Face to face? Online? A combination of the two?
Having writers write face to face has many benefits, but can also be very expensive. There are many online writing tools, such as Google Docs, that make online collaboration easier for writers who are far away from one another. A combination of the two (face to face meeting session followed by online writing) may be a good option for writing projects.
What is the timeline? When must resources be started, finished, approved and posted to the web?
A timeline may be dictated by the body funding the writing project, such as the Ministry of Education, or can be set by the project manager. Regardless, having clear turnaround times determined from the beginning of the project is helpful when formulating a plan and communicating with writers about the project.

*Answering these important questions beforehand helps decide the best model for the writing project.*

**Writing Team Roles and Responsibilities**

A clear outline of roles and responsibilities is key to success when assembling a writing team. While not all teams may require all of the following roles, each makes an important contribution to the final product and should be considered when planning a project.

**Project Manager/Principal Writer**

- Oversees the project and takes on administrative duties needed for implementation of the project, including the drafting of contracts, planning of training sessions, etc.
- Assists in the writing, reviewing, and/or copywriting of the curriculum resources as needed.
- Communicates regularly with Lead Writers, Reviewers, Technology Lead and others
- Drafts a final report for the project upon its completion.

**Selection Committee**

- Reviews applications for writing positions and makes recommendations for hiring.
- May be struck from the subject association board, but should not be applying for positions themselves, to avoid potential conflicts of interest.

**Treasurer**

- Works with the Project Manager to draft the project budget.
- Works with the funding body (such as the Ministry of Education) to organize transfer payments, banking requirements, etc.
- Handles expenses such as hotel bookings, food, travel requirements for writing teams and reviewers, if applicable.
- Pays writing teams by agreed-upon deadlines and reimburses them for allowable expenses.
- Drafts a final financial statement upon the project’s completion.

**Lead Writers**

- Leads the Writing Team (Writers and Reviewers) in drafting an action plan (see Appendix H Sample Action Plan) for the creation of resources.
● Engages in ongoing dialogue with the Writers throughout the writing process to ensure that they are fulfilling their roles.
● Submits draft resources to the Reviewers to gather feedback. A Lead Writer may be responsible for revising the document directly or revisions may be done by the Reviewer in conjunction with the Lead Writer.
● Revises and submits resources to the Project Manager by the agreed-upon delivery date.

Writer(s)
● Works with the Writing Team (Lead Writer and Reviewers) to draft an action plan for the creation of resources.
● Engages in ongoing dialogue with the Lead Writer throughout the writing process.
● Uses the agreed-upon template (such as the Ministry of Education Curriculum Branch’s Three-Part Lesson Template) for the creation of curriculum resources.
● Includes formative activities (process) and culminating activities (product) as specified in the action plan.
● Develops unit support materials (e.g. handouts, anchor charts, electronic resources).
● Cites all sources and obtains copyright or permission to use materials as needed.
● Engages in ongoing dialogue with the Lead Writer/Reviewers throughout the writing process and uses their feedback to make revisions by the agreed-upon delivery date.

Reviewer
● Discusses progress and results with the Lead Writer during the writing process OR after the draft resources have been submitted for review and provides feedback and suggestions for revision.
● Acts as a subject expert to ensure the document is accurate in terminology and theory, and aligns with Ministry of Education Curriculum Expectations.
● Ensures that the resources developed are free of spelling, grammar and usage errors, are clear and coherent, and are formatted according to the guidelines outlined by the Project Manager.

Copywriter
● Completes a “final edit” of curriculum resources for consistency of voice and formatting, attention to equity and other pertinent lenses.
● Ensures that the resources developed are free of spelling, grammar and usage errors, are clear and coherent, and are formatted according to the guidelines outlined by the Project Manager.

Technology Lead
Manages the technological aspects of the project and acts as webmaster, tech support, and technology trainer.
Organizes the collaboration of writers through software such as Google Docs.
Develops procedures for online collaboration.
Trains writing teams at an initial workshop.
Monitors the teams’ progress and assists when necessary.
Maintains the design integrity of the project.
Publishes all material.
Supervises the development of any publishing infrastructure (back-end web development, etc.)

Writing Team Models

1. The Team Model
The Team Model is the most traditional model for curriculum resource writing and planning. In this model, a team of Writers is struck, with one Lead Writer overseeing the development of resources as well as writing resources him or herself. Each team has one or more Reviewers who review, edit and make recommendations to the team after the draft resources have been written. The Lead Writer, often in conjunction with the Writers, then revises the final resources. The Lead Writer submits the finished materials to the Project Manager, who submits resources for final copywriting and/or publishing to the web.

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<thead>
<tr>
<th>Advantages of this Model</th>
<th>Disadvantages of this Model</th>
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<tr>
<td>Clear chain of command</td>
<td>Relies heavily on the expertise of Leads and Reviewers</td>
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<tr>
<td>Roles and responsibilities of each team member are clearly</td>
<td>Responsibilities for editing can be unclear, putting Leads in</td>
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<tr>
<td>outlined</td>
<td>a potentially difficult position</td>
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<tr>
<td>Uses the expertise of experienced Writers and Reviewers</td>
<td>Problems may go undetected until resources reach Reviewer,</td>
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<tr>
<td>effectively</td>
<td>resulting in the need for extensive rewrites</td>
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<tr>
<td>New writers can learn from more experienced Leads and</td>
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<td>Reviewers</td>
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2. The Think Tank Model
In the Think Tank model, all team members (Writers, Lead Writers, Reviewers) meet (usually face to face) to share expertise and plan. Then, a single Writer or small group of Writers drafts the resources in ongoing consultation with Reviewers. In this model, Reviewers give ongoing feedback and may do a shorter “final edit” before materials are sent to the Project Manager for final copywriting and publishing. The Writers and Reviewers may even decide to co-write the resources together.
<table>
<thead>
<tr>
<th>Advantages of this Model</th>
<th>Disadvantages of this Model</th>
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</thead>
<tbody>
<tr>
<td>Capitalizes on the expertise of all team members</td>
<td>Requires time for teams to meet face to face and plan</td>
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<tr>
<td>Smaller, more focused teams can result in more consistency in quality of writing</td>
<td>Project Manager may need to intervene to assist with collaboration when issues arise</td>
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<tr>
<td>Ongoing dialogue from Reviewers helps to catch potential problems before they develop</td>
<td>Roles and responsibilities are less defined</td>
</tr>
<tr>
<td>New writers can learn from more experienced Leads and Reviewers through collaboration</td>
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**Sensitivity and Troubleshooting with Writing Teams**

As with any project, curriculum resource writing projects may bring their own unique issues and problems to the table. Troubleshooting problems such as disagreements between writing team members and differences in educational philosophies takes sensitivity and diplomacy on the part of Reviewers, Lead Writers and Project Manager. Here are suggestions to assist with the most common issues that arise in curriculum resource writing projects:

**Differences in educational philosophy**

When selecting Writers and building writing teams, the selection committee should use their professional judgement to make productive working groups. For example, considering the background and educational philosophies of the applicants is important. Having multiple perspectives on curriculum can certainly benefit teams when writing, and the Lead Writer must have the necessary skills to mediate and build consensus between Writers if problems arise. When problems cannot be resolved amicably, the Lead Writer must be able to make a decision, based on further input from the Project Manager.

**Disagreements between Writers/Reviewers**

There are times when Reviewers and Writers may disagree about suggested changes to a resource. The Lead Writer is as mediator in these situations and makes a final call as to what changes need to be made in a document. If this is not possible, the issue can be deferred to the Project Manager and/or Copywriter.

**Sensitivity over editing changes**

At the training session, it should be made clear to writing teams that all curriculum resources will be subject to editing and revisions from Reviewers and Copywriters. In some cases, resources may need extensive rewriting, and everyone needs to be made aware that this is a possibility.
Call for and Selection of Writers

When hiring writers for a curriculum resource writing project, clearly defined criteria (see “Questions to Consider...” below) should be developed for the selection committee to consider when reviewing applications. Subject associations should also be aware of their by-laws and regulations as they pertain to conflict of interest when considering applicants who may hold positions on their boards.

Timeline for Call for and Selection of Writers

- Project Manager drafts a call for writing team members with specific criteria and application deadlines (see Appendix A: Sample Call for Writers and Application Form)
- Call is posted to the subject association’s website and promoted to the membership
- Applications are collected and vetted by the selection committee
- Offers are made by the Project Manager, and contracts are distributed to members of the Writing Team (see Appendix B: Sample Contract)

Questions to Consider When Hiring Writers:

- Does the applicant have previous curriculum resource writing experience?
- Is the applicant a subject specialist in his or her field of study?
- Does the applicant have an understanding of the current curriculum, best practices, assessment and evaluation policies, etc.?
- Does the applicant possess strong writing skills? (Submitting a writing sample is helpful as part of the application)
- Does the applicant have strong computer skills? (i.e. familiarity with Google Docs, e-mail, basic word-processing, ability to follow instructions, understanding file formats, etc.)
- Does the applicant possess leadership skills if applying for a Lead position?
- How well does the applicant work collaboratively in a team setting?
- Can the applicant take constructive criticism and make revisions to his or her work based on the suggestions of others?
- Are the writing teams representative of the membership of the subject association? (i.e. comprised of elementary/secondary, public and separate, from various provincial geographical regions, male/female, etc.)

Technical and Publishing Considerations

Consider the elements listed below when planning a writing project. It is important that a plan be made for the actual publishing of the documents or they will not be seen by the intended audience. When publishing to the web, there are a number of issues regarding existing infrastructure or money that needs to be spent to develop the necessary infrastructure for publishing the content:

An inventory of existing infrastructure is necessary to determine if the current website has a CMS (Content Management System) for posting, cataloguing and managing the resources.
If there is not, then determine whether there are funds to build it. If funds are not available, a temporary means of managing the resources must be determined. A writing template must be designed. A guide to formatting must be developed, taught, and enforced. A structure for collaboration on Google Docs or other software must be established.

For details on planning these aspects, see the **Technical Guide**.

### Budget

Consider these factors when drafting a budget for curriculum resource writing projects:

#### Honouraria for Writers and Reviewers
- Honouraria should follow the Ministry of Education rates as a general guideline for Lead Writers, Writers, Reviewers, and Copywriters.
- All Writing Team members should keep work logs of their hours to be submitted to the Project Manager at the end of the project.

#### Training Session Expenses
- Space rental for training meetings
- Hotel expenses for those travelling from out of area
- Meal expenses
- Mileage expenses

#### Publishing Expenses
It is important for Project Managers to recognize that the tasks and costs for publishing resources are developed from the nature of the tasks and the time taken to accomplish those tasks. For example:
- The creation of a template and formatting rules for writers.
- On-going problem-solving and troubleshooting technology issues for all collaborators.
- The initial technology training session, including management of Google Docs (or other online collaboration system) necessary for successful collaboration as well as ongoing training for members.
- The time to clean document formatting prior to publication.
- File management.
- The uploading and publishing documents.
- Web development (creation of back-end infrastructure, web hosting, web design, etc.)
- Image creation and diagrams for the documents.
Part C: Training Writing Teams

Building in time to meet with and train writing teams is an important part of a curriculum resource writing project. It allows for Writers to meet and exchange ideas and gives the Project Manager, Treasurer and Technology Lead an opportunity to organize and administer the project. Most importantly, it helps teams to understand what is expected of them as well as the guidelines for the project.

Recommendations for Planning Training Sessions:

- Whenever possible, training should be done face to face. This requires the securing of space for writing teams (such as a Faculty of Education, board office, conference centre) and the managing of transportation, hotel and food costs.
- Ensure that you have the technical support you need. Access to WiFi, LCD projectors and screens are crucial for training teams to understand the technical aspects of the project.
- Bring in experts to assist in training writing teams. Consider inviting a representative from the Ministry of Education to give background on the project. Bring in experts in specific fields such as aboriginal education, equity, critical literacy, assessment and evaluation, etc. to provide professional development for writing teams and time for asking the questions. An expert in copyright law can give a basic understanding of what constitutes "fair use" of material and what kinds of material should not be included due to copyright infringement.
- Give teams time to talk and plan together. Carve out time for writing teams to exchange ideas and draft action plans for the creation of resources (see Appendix H Sample Action Plan). Consider building in different groupings; for example, time for Reviewers to meet with the Project Manager to review guidelines, and time for different teams to meet and share with one another to maximize the expertise in the room.
- Bring materials that can help in the planning of the project. Copies of current curriculum documents and Ministry policies should be readily available. Consider putting all pertinent materials on a flash drive for writing teams to take with them. Encourage writing teams to bring their own resources to the training as well.
- Allow time for technical training from the Technology Lead. This training should include use of Google Docs, but also what is allowed in the formatting and what is not allowed.
- Consider making time to write. Some writing projects are completed fully face to face over a series of days, in a “retreat” setting. Consider this option carefully when budgeting for the project.
- Conclude the training session by having teams submit an action plan to the Project Manager with specifics around content, timelines, etc.

See Appendix C: Sample Agenda for Training Session for more information on training sessions.
Part D: Writing Curriculum Resources

Once writing teams have been trained and submitted their action plans, the writing can begin. To avoid potential problems, it is important to maintain open lines of communication among the Project Manager, Lead Writers and Reviewers. Outline a clear chain of command for troubleshooting (e.g. consulting the Technology Lead with technical questions, the Treasurer for financial ones).

If writing is happening remotely, a collaborative writing tool such as Google Docs should be used by writing teams. This allows for easy communication between Writers, who can view each other’s writing, add questions and comments, revise work, and more. It also ensures that all work is stored centrally and is therefore less likely to be lost or erased. See Technical Guide for more.

Supply writing teams with guidance around what is expected of their writing. See the considerations listed below as an example of these guidelines, and for more see Appendix D: Project Plan for Writing Teams. To assist writing teams, provide a model lesson such as the one found in Appendix E: Model Lesson for easy reference.

Other Important Considerations

Quality over Quantity
Value the quality of resources over the quantity of resources—more is not necessarily better. Keep lessons and units manageable, practical and above all, useful for teachers. Lessons should not contain numerous numbers of Black Line Masters or “BLMs” (in the form of handouts, rubrics, etc.). In some cases, lessons could refer to BLM materials that are posted on existing websites (e.g. see BLM #7 Peer Editing Checklist in the Grade 9 Coming of Age Novel Study Unit).

Current and Best Practices
Lessons and units should demonstrate timely, innovative content that reflects current and best practices in the subject discipline, as well as in assessment and evaluation. It is wise to check to ensure that lessons created do not duplicate material already found on the subject association website.

Using Source Material and Copyright
Resources must be the original work of the Writers and Reviewers, and should not duplicate material that has been published by the Writers, Reviewers, or others. When basing resources on existing source
material (e.g. picture books, articles, etc) ensure that these materials are in print, widely accessible to teachers across Ontario, and give alternative options if possible. Do not use copyrighted material in resources, such as passages from books, graphics, scripts, etc. Include such materials as recommended resources with proper bibliographic information in the lesson.

Equity and Diversity
Resources should reflect the diversity of students and teachers across Ontario, as well as current Ministry policy as it pertains to equity and diversity.

Assessment and Evaluation
Resources should contain strategies and tools for assessment and evaluation, including examples of assessment for, as and of learning.

Extensions/Resources
Resources, particularly stand-alone lessons, benefit greatly from possible extension ideas and resource lists for teachers looking to use them as the basis for expanded study.

Writing and Formatting
Resources must follow the rules for writing and formatting as outlined by the Technology Lead. It is the responsibility of the Reviewers to ensure that these rules are followed and corrected in the final draft submitted to the Project Manager.

Formatting
The Project Manager, in consultation with the Technology Lead, should set the rules for formatting of resources based on the needs of the project. Templates and a set of guidelines for writing should be shared with writing teams (see Appendix F: Guidelines for Formatting) so that Lead Writers, Reviewers and Copywriters can examine resources to ensure that they meet the expectations of the project.

Technical Aspects of Formatting/Tips
When creating formatting for the web, it is important that the template be as simple as possible. Web formatting happens in conjunction with a style sheet. As such, the format of the document during writing will not be the format of the document when it is published on the web. Formatting should be developed for clarity and organization of content and not for aesthetics. When the document is finally published, the web developers will impose the visual and design aesthetic upon the structure, as opposed to using the written content's formatting in the design.
Considerations for formatting:

Use a header, sub-header hierarchy to break up all content. A minimum of 3 heading types is recommended.

Aside from changing the header type (heading 1, heading 2, etc.), writers may use italics, bold and underline, but there should be consistency in their use (e.g., italics for works cited, bold for emphasis and underline for links).

Use one font colour only; black is preferable.

Images that are in-line in the document cannot simply be pasted into the document. They must also be sent as a separate file (e.g., as a gif, jpeg, png file, etc.) to the Technology Lead, as they must be uploaded separately to the website.

Spacing and letters cannot be used to create images or diagrams, as spacing and font sizes change when published to the web. They must be created as separate graphics.

For more information, see See Appendix E: Guidelines for Formatting and the Technology Guide.

Reviewing

Having experienced Reviewers is crucial to creating a professional finished product. Whenever possible, Reviewers should be included in the process of training and writing so that they have a clear sense of the scope and goals of the writing project.

Considerations for Reviewing Resources:

- Ensure that Reviewers have excellent proofreading and editing skills so that they can edit mechanical errors.
- Consider having Reviewers “check in” and troubleshoot during the writing process. By providing ongoing feedback, Reviewers are less likely to be “surprised” by the resources they receive for review, thus eliminating the need for extensive rewrites.
- Set clear guidelines with writing teams about editing responsibilities. Questions to consider: Is the Reviewer editing and revising the resources, or making suggestions to the Lead Writer, who then edits and revises? Will the revised resource be send to the Reviewer for a “final look”? Are Reviewers responsible for content only, or for content and formatting of the resources?

See Appendix H: Guidelines for Reviewers for a set of instructions for Reviewers to consider when writing curriculum resources.

Editing and Copywriting

Though not always necessary in writing projects, a Copywriter can be invaluable in ensuring that the curriculum resources are polished and professional. Consider hiring one or more Copywriters to perform a “final edit” of all resources to ensure that there is consistency in resources in terms of voice, tone,
formatting and subject matter. Copywriters can act as an outside pair of eyes on the resources, raising the red flag on content that may be unclear or problematic that Writers and Reviewers may not have noticed.

**Posting/Technical Publishing**

As documents are completed, reviewed and edited, they should be released for publishing to the Technology Lead. In the interest of timeliness, the Technology Lead should start to work on each document as it is completed by the Project Manager or Principal Writer as opposed to handing it all off to him or her in one package. This method saves a lot of time in the long run.

The Technology Lead should follow the following process for posting of content to the website:

- **Code Cleaning** - Clean the documents of unnecessary formatting and superfluous HTML code that was invisibly inserted by the Writers. This is important to “future-proof” the documents. When the website is updated, superfluous code can cause problems in formatting.
- **File management** - Rename and convert all BLMs to PDF format so that they can be printed easily. Upload them to the website and link the documents to the BLM files.
- **Any additional tagging** (e.g., the CODE website has a "pop-up glossary" that requires additional tagging of the content)
- **Document archiving** - Archive all of the original versions of the resources.

Sometimes it is helpful to retain the original digital copies of documents. An archive is simply retaining those documents for future board members to use or edit. If the documents are all in Google Docs, then archiving them can be done by reassigning ownership of those documents to a Google Account that will belong to the subject association or by downloading the documents as MS Word documents and storing them on a USB key. See the **Technical Guide** for more information.
Part E: Conclusion

When a writing project has concluded, the key players, including the Project Manager, Treasurer, Technology Lead, and key Writers should meet to debrief the process. They should discuss, in an open and objective way, aspects of the project that were successful and those that need improvement next time. These are some of the activities that the team might discuss and act upon:

- Making lists of valuable writers as well as recommendations for future writing teams is crucial to ensure that valuable learning does not get lost. Associations may wish to organize those lists by various criteria, such as geographical representation, gender, years of experience, or others.
- Documenting the process and ensuring that forms, backup copies of resources, etc. are kept safe for future reference should also be part of this final debriefing.
- Looking at successful writing teams that produced high-quality work and discussing what made their work so productive. This may involve an interview with Writers to gain effective strategies that could be factored into future training sessions.
- Reviewing the final budget to see how closely it aligned with the projected budget and making recommendations for streamlining expenses in the future.
Technical Guide

This Technical Guide should be given to the Technology Lead, or person in charge of all technology choices. It references the types of programming (such as HTML) and collaborative writing tools (such as Google Docs), and document formats (such as PDF) that were used for the writing projects completed by subject associations in recent years. Remember that these types of technology will change and adapt over time, and so these references may need to be changed and updated in the future. While the technology may change, many of the basic principles behind the technology should remain static.

During writing projects, the Technology Lead should oversee an easy transition from writing process to publication. It is important that the Technology Lead has a strong understanding of web publishing, HTML, CSS and some knowledge of content management systems to make appropriate choices for this project. It is also important that the Technology Lead can explain the difference between the writing process and the published material to other Project Managers and Writers for a smooth transition between the two.

Overview of Publication for the Web

Why Web Publishing and Not Print?

This guide is a manual for web-publishing content because print is inefficient and expensive. Print resources must first be printed and then shipped to all individuals who want to use the resource. Further compounding issues is the fact that colour printing is much more expensive than black and white, which can limit graphic design choices for clarity and aesthetics. Finally, any extra printed copies must be stored in a physical location and when they run out, a new print run must be ordered. With web, storage exists in a virtual location and distribution is not limited by numbers as copies can be read as often as desired and distributed around the world without the cost of shipping. The cost of hosting a website is nominal compared to storage of physical copies. Finally, because the documents exist in an electronic format, subject associations can edit and update the documents and they will be automatically updated on the website.
Differences Between Print and Web Publishing

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<th>Web</th>
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<tr>
<td>Print documents are paginated and always fit within a 8.5 x 11&quot; piece of paper or other standard paper size.</td>
<td>Content on the web can exist as one long document on a web page. Pagination only exists when imposed by the designer/ writer.</td>
</tr>
<tr>
<td>Font size and all design elements are static and do not change.</td>
<td>Font size, colours, and output of design elements can vary drastically depending on browser, operating system and monitor. As a result, graphic design of templates should be kept as simple as possible, so that the fluid nature of the web can allow it to change as is necessary.</td>
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<tr>
<td>Print requires very high resolution, usually 300 dpi for pictures.</td>
<td>The higher the resolution in a document, the larger the file size, and the longer it takes to download. Images must be optimized for the web and not for print. File sizes must be strictly managed, especially in handouts.</td>
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<tr>
<td>Tables, columns, etc., can be used to manage content in visually appealing ways.</td>
<td>Every browser will interpret complicated layout choices differently (e.g., tables). These are to be avoided as much as possible. It is best if templates are designed to be linear (one column). Very simple hard-coded tables used for data, not for layout, are fine.</td>
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<tr>
<td>Once printed, the design of a print document remains static and cannot change.</td>
<td>If designed properly, a template for web publishing allows the designer to change all of the formatting for an entire website, including the resources, with small tweaks to a single reference document (look up &quot;cascading style sheets&quot; for more information).</td>
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File Format for Publishing

Many publications for the web take one of two formats. HTML is the mark-up language used for publishing to the Internet. All websites are built in HTML. PDF is the acronym for "Portable Document Format" and is essentially a print document that is output into a digital format.

Advantages and Disadvantages of Using PDFs

The most common way for subject associations to publish their resources in the past was using PDF formats. PDF is an extremely problematic format for web publishing, specifically because it is designed to emulate print and not the way we browse the web.

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<th>Advantages of PDF</th>
<th>Disadvantages of PDF</th>
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<tr>
<td>Can be easily printed, and is therefore best for handouts.</td>
<td>Slightly more difficult to browse. Takes the reader away from the website and into a separate page. They cannot continue to browse without going &quot;back&quot; to the page before.</td>
</tr>
<tr>
<td>Can be easily designed in</td>
<td>Document is paginated. May be problematic to have virtual &quot;page</td>
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Website Infrastructure

The largest obstacle to web publishing is a lack of infrastructure. The more content on a website, the more important it is that there be an infrastructure for storing, managing and searching that content. It is similar to buying a large number of books, but never building any shelves to store them. Then, if those books begin to turn into a library, not having a Dewey Decimal or other organizational system to determine where to shelve the books or how to search for them. The following are the fundamental aspects of website infrastructure:

- Content Management System (CMS)
- Resource Database

Content Management System

A Content Management System (or CMS) is a web application that acts as the "back-end" of a website. It is the invisible machinery that publishes and stores all of the content on a website. The website itself is viewed by visitors, but they never see the CMS, only what the CMS outputs, much in the same way as a reader sees a printed document, but never sees the word processing program it was typed on.

There are numerous Content Management Systems that are free and open-source available for subject associations to use. CODE uses Drupal, but more simple systems like Word Press and Wild Apricot’s system are also available. It is possible to use these to manage a website, but not all of them will allow for creation of a resource database. Before proceeding with a CMS, it is important to speak with a web-development company to ensure that it is suitable for the needs of the organization and for the publishing of resources. The following are considerations for choosing a CMS:

- Is there content that needs to be password protected?
- Will the website be used as a membership database as well?
- Can modules be designed for the CMS that will help store and manage the resource database?
- Is it easy enough to use that members of the subject association will be able to use it?

Resource Database

Once a content management system is chosen, a resource database must be developed to store all of the resources. The resource database should include the following:
● A form for inputting all of the content into, including title, grade, subject (if applicable), content and BLM files.
● There should be a way to upload BLM files and associate (link) them with the text file.
● The content of the resource should output into a logical format that is "paginated" in some way. For example, each section has its own link in a menu with a "next section" link at the bottom.
● It should be possible to link a BLM to any references to it within the content of the lesson/resource

Formatting for Web

The goal of proper web formatting should be to “future-proof” any design choices.

Creating the Writing Template

During the 2010 writing project, hours were spent cleaning documents of bad formatting and glitches. In the 2011 Financial Literacy project this time was minimal, because the template was clean and simple. A simple writing template took less time, and as a result cost less money to use.

The writing template should be completely devoid of aesthetic choices and completely utilitarian. This is only a template for the actual writing process. When it is posted, the website's cascading style sheet is used to change the formatting for design and aesthetic purposes. To make this happen, all in-line formatting should be avoided.

Keep it Clean

The writing template should be simple, modest and work towards clarity. To that end, here are some general rules for keeping the writing template clean:

  Tables can be used, but only as content, **not for layout**.
  Images may be included in the written material, but should also be filed separately in the share folder along with any BLMs, as images must be inserted separately when posting in HTML.
  Left-align only.
  Single-space only.
  Font size should remain consistent throughout and change only with heading styles.
  BLMs should be created as separate files and e-mailed to the Technology Lead.

Using Styles in a Template

Most word processing programs (MS Word and Google Docs included) function with a style sheet. The style menu of a word processing program stores the formatting for various styles. When a user highlights and then tags text with a style, it formats accordingly. It is possible (but not necessary) to change the format of the individual styles for the writing template.

All word processing programs have a "mark-up language" much like HTML, and when a document is formatted, the text is "tagged" with this mark-up language. Using styles is important, because it tags the
text with a container tag that references the style sheet allowing the style sheet to impose the formatting rules. By doing this, when the document is posted to the web, there is no in-line formatting in the text. In-line formatting cannot be changed by a style sheet in the way that style formatting can.

Another advantage of using styles, is that CMS WYSIWYG editors often have a "paste from MS Word" option or can have that function added. This means that when pasting from a document (even when using Google Docs) text that has been tagged with "Heading 1" will get tagged with <h1> when converted to HTML, therefore cutting down on the amount of time necessary to tag the rest of the document.

Writers' Rules for Formatting
The rules for formatting should comply directly with the writing template. The template should be loaded with appropriate styles (Heading 1, Heading 2, Heading 3, Heading 4, etc.). Writers should comply with the use of those styles only. They should use a Heading → Sub-heading system of writing (much in the same way that this document has been written). This formatting system allows for clarity of which sections belong to which content, guides the reader through each section and also allows the reader to skim the document by reading the headers only. This kind of reading is very common on the Internet, and to facilitate this, headings should be used.

Writers should use bold, italics and underlining, but always with specific rules (e.g., italics for referencing secondary sources, bold for emphasis, and underline for links). They can also link within the document themselves. Any other formatting should be avoided.

See Appendix E: Guidelines for Formatting for further reference.

Procedure
NOTE: These procedural instructions are written with the assumption that the project is using Google Docs and that Google Docs maintains many of its current basic functions. Even if the project is not using Google Docs, most collaboration software will have similar functions.

Before Writing Begins
While the writers are being selected, the Technology Lead should develop the document sharing structure, plan the infrastructure needed to host the resources on the website and develop the templates.

Inventory Web Publishing Infrastructure

- Does the website have a CMS?
- Does the CMS offer a system for creating a resource archive?
- If not, contact a web-development company and get a quote for developing either or both.
Put this quote into the writing project budget. If it costs too much, devise a secondary method for posting the content.

Create the Writing Template
Create a template that includes all pertinent headers and sub-headers, with place-holder text (e.g. "Insert instructions for lesson here"). Create a template for all BLMs.

Setting up the Sharing System and Protocol
Have each person on the writing team set-up a Google account. When they have done so, have them e-mail the address they will be using for their account. Compile a list of all of these accounts and organize.
Set up a file-naming protocol. File naming protocols should be a list of labels, separated by hyphens, that start from largest container to smallest, such as Subject-Grade-ResourceTitle-FileName.
The following are examples:
- Drama-7-FindingMyWay-BLM2Rubric.doc
- AMT2O-CompositionForNature-UnitPlan
- SocialStudies-5-EarlyCivilizations-EmporersofChina.jpg
Create share folders, where all docs can be filed. Share the folders to the appropriate teams. While the documents can be shared individually, shared folders are easier to manage as BLMs and images get added, and are therefore the recommended method.
- Lead Writers may decide that Writers will only be able to read what they themselves are working on; however, writing teams may benefit from reading what others are writing so that they have other writing examples to work from.
- Sharing the folder to more than one person can lead to issues of individuals editing other people's documents; however, revision history allows one to omit accidental changes.
- Every document that is being written should be shared to the following: Technology Lead, Project Manager, Lead Writer, Reviewer, Writers, Copywriters. BLMs and images can be written in MS Word or in Google Docs, but should be uploaded to the appropriate share folder.

Training Session
At the training session, the following content should be covered:
- Protocol for sharing
  All documents as they are being written must be in the share folder. Writers should not be writing elsewhere and then pasting into the document. They should write only in the shared document, so edits and comments can be made during the writing process and to avoid "carrying over" mark-up tags from another program.
  All BLMs and images that are inserted into the lesson document must be put into the appropriate share folder and named according to file naming conventions.
Formatting Rules

Explain the formatting rules. See Appendix E: Guidelines for Formatting.

Explain that their writing template is utilitarian and only for writing. It will look different when posted on the website. Writers should avoid any aesthetic choices in their formatting (e.g. colour changes, font changes, etc.) as they will change when posted.

Explain the differences between use of italics, bold and underline.

During the Writing Process

While the rest of the team members are working on the writing, the Technology Lead must ensure that the infrastructure for posting the resources is in place. Instead of personally developing it, the Technology Lead can oversee the creation of the infrastructure through an outside web developer.

Check in on the documents to ensure that writing teams are adhering to the formatting protocols and that documents are being named appropriately.

Field e-mails regarding issues with technology.

Cleaning and Posting

When documents are finished and final read-throughs are completed, the folders should be unshared from Writers and Lead Writers. Alternatively, the Project Manager can move them into a new share folder labelled "To be posted." When a resource is posted, move this folder to another folder labelled "Posted." This "inbox/outbox" method is very helpful for keeping track of what is posted and what is not.

Create a spreadsheet to track progress of the writing project. This spreadsheet can be used to communicate among the Project Manager, the Copywriters, and the Technology Lead.

Example:

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Writing Completed</th>
<th>Copy-writing Completed</th>
<th>Code cleaning</th>
<th>Posted to Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drama-7-FindingMyWay</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Studies-5-EarlyCivilizations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Music-AMT20-CompositionForNature</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Clean the documents by converting to HTML (paste to your website and view the HTML) and copy and then paste into a HTML editor like Dreamweaver. Scan for any superfluous code. The only tags should be for headers (<h1>, <h2>, etc.), links (<a>), etc.

Link all references to the individual BLMs to the actual BLM documents so readers can reference them more easily.

Finally, archive all of the original written documents for future reference.
Appendix A: Sample Call for Writers and Application Form

A Call for Writers and Reviewers:
Financial Literacy Resource Development Project

Due Date

Contact Information of Project Manager

We are pleased to announce that the subject association, with the support of the Ministry of Education, will be developing resource materials to support teachers with the implementation of the Financial Literacy initiative. To find out more about this initiative, please consult A Sound Investment: Financial Literacy Education in Ontario Schools posted on the Ministry of Education’s website at www.edu.gov.on.ca.

Writing teams will develop subject-specific junior (4-6), intermediate (7-10) and secondary (11-12) resources (e.g. a series of lessons or mini-unit and supplementary materials) focusing on the core concepts of Financial Literacy:

- the concepts of income, money, earning, saving, spending, investing, budgeting, credit and borrowing, risks and rewards, compound interest, pensions, insurance, taxes, and planning ahead;
- how the financial system works;
- the difference between wants and needs;
- consumer awareness and advertising;
- fraud and its consequences;
- future consequences of financial decisions; and
- how to plan for life after high school.

These resources will be available to ALL educators on the subject association’s website.

This package outlines the experience needed, and areas of responsibility for Writers and Reviewers. Honouraria indicate the amount that EACH Writer and Reviewer will receive and reflect current Ministry rates. Writers and Reviewers will be paid once completed resources are delivered to the Project Manager by the agreed upon dates.

Active and current members of the subject association will be given priority in the consideration of applications for these writing positions. Word processing skills and familiarity with Google Docs are a must.
Qualifications/Experience

Qualifications and experience in the following areas will be considered for this Project:

WRITERS
Must demonstrate:
- Previous experience with writing projects
- Knowledge of the curriculum and expectations for Elementary and/or Secondary
- Knowledge of key current assessment and evaluation strategies as outlined in Growing Success: Assessment, Evaluation and Reporting in Ontario Schools
- Knowledge of the key concepts of Financial Literacy and experience teaching them in a classroom and/or real-world context
- Sensitivity, knowledge, and understanding of equity issues
- Sensitivity and awareness of the needs of all areas of the province
- Familiarity with word processing programs and Google Docs

REVIEWERS
Must demonstrate:
- Leadership experience
- Previous experience with writing or review
- Knowledge of the curriculum expectations for Secondary and Elementary
- Knowledge of key current assessment and evaluation strategies as outlined in Growing Success: Assessment, Evaluation and Reporting in Ontario Schools
- Knowledge of the key concepts of Financial Literacy
- Sensitivity and understanding of equity issues
- Strong spelling, grammar, usage and proofreading skills
- Familiarity with word processing programs and Google Docs

All curriculum-linked resources will:
- Align with the current Ontario curriculum
- Align with the Financial Literacy Scope and Sequence
- Support both the elementary and secondary expectations;
- Demonstrate a range of current instructional and assessment practices as outlined in Growing Success: Assessment, Evaluation and Reporting in Ontario Schools
- Support ongoing Ministry initiatives related to literacy and numeracy, student success, environmental education, and equity and inclusive education.

All WRITERS will:
- Work with the Reviewer(s) to draft an action plan for the creation of resources
- Use a template based on the Ministry of Education’s Curriculum Branch’s Three-Part Lesson Template
- Include formative activities (process) and culminating activities (product)
- Develop unit support materials (e.g. handouts, anchor charts, electronic resources)
Cite all sources and obtains copyright or permission to use materials as needed
Engage in ongoing dialogue with the Lead Writers/Reviewers throughout the writing process
and use their feedback to make revisions to the resource by the agreed upon delivery date; and
Complete and send the draft resources to the Reviewer by the agreed-upon delivery date.

All REVIEWERS will:

Work with the writing team to draft an action plan for the creation of resources and deliver an
electronic copy of this action plan to the Project Manager by an agreed-upon date
Engage in ongoing dialogue with the Writer during the writing process and provide feedback and
suggestions for revision
Act as a subject expert to ensure the document is accurate in terminology and theory, aligns
with curriculum expectations and the scope and sequence for Financial Literacy as outlined by
the Ministry of Education
Ensure that the resources developed are free of spelling, grammar and usage errors, are clear
and coherent, and are formatted according to the guidelines outlined by Project Manager
Send the final product to the Project Manager by the agreed-upon deadline.

Timelines and Important Dates

Honouraria Guidelines
Accommodation (for those whose home address is a minimum of 300 km return from the training
session location), and reasonable requests for transportation reimbursement for the session will be
granted according to current Ministry of Education guidelines. Refreshments and lunch will be provided
for the Training Session.

We hope that you will seriously consider responding to this call and will consult the Ministry of
Education’s document A Sound Investment: Financial Literacy Education in Ontario Schools for further
information and when preparing your application. If you are interested in applying for a position, please
complete the attached form and e-mail with your résumé and a sample of curriculum resources you
have written to the Project Manager by the deadline.

Application Form

1. General Information
Applicant’s Name:
Please indicate the positions you wish to apply for:

2. Applicant Information
Applicant’s Name:
Subject Association Member:  Yes     No
Board/ Authority:
School/Site Address:
School/Site Phone:  
School/Site Fax:  
Home Address:  
Home Phone:  
E-mail:  

Reference # 1:  
Name:  
Position:  
Home Phone: E-mail:  

Reference # 2:  
Name:  
Position:  
Home Phone: E-mail:  

I agree that the Subject Association personnel may contact the above names as references. Yes

3. Applicant Experience

Applicant’s Name:  

Please, indicate the grades and subjects/courses you have taught, over the past five years. Years of classroom teaching experience in the subject.  

Additional Qualifications (including Honours Specialist) in:

4. Supplementary Materials

Please include the following supplementary materials in your application (as part of this document or as Word- or PDF-formatted attachments):

A resume that includes experience in writing, leadership, working in a team setting, and any other additional experience that may apply to this project.

A sample of curriculum resources you have recently written.  

NOTE: Only successful applicants will be contacted.
Appendix B: Sample Contract

LETTER OF AGREEMENT

Date:

Name of Participant: ________________________________________

Mailing Address of Participant: __________________________________________________

Dear ______________:

This letter, in duplicate, when signed below by both parties, shall constitute the agreement (“Agreement”) between you (“Writer or Reviewer”) and the Subject Association for work on the Financial Literacy Resource Project Teams for The Ministry of Education (or Ministry designate).

Terms and Conditions

1. Resource development

All resources developed by you are done in consultation with the Subject Association and the Ministry of Education (or Ministry designate). It is your responsibility to ensure all timelines and criteria set by the Subject Association and the Ministry are met.

Resources developed must be curriculum linked and:

- Support the revised elementary or secondary expectations;
- Demonstrate a range of current instructional and assessment practices;
- Reflect the key concepts of financial literacy as outlined by the Ministry
- Support ongoing Ministry initiatives related to literacy and numeracy, student success, environmental education, FNMI, equity, inclusive education, and critical literacy.

a) You are an independent contractor who will be creating and/or reviewing resources as

a: Writer Reviewer

b) You must carry out the assignment under this Agreement in close consultation with the Project Manager.

c) Your responsibilities with respect to your role, is outlined in the Orientation package.

2. Term

Resource development shall be mutually agreed upon and performed between:


3. Ownership of Materials

All resources will be posted on the Subject Association website accessible to the public and, as appropriate, on Ministry of Education sites such as the Ontario Educational
Resource Bank. Resources will be the property of the Subject Association with the Ministry having a royalty free license to use the final project materials for any purpose except commercial gain. Without limitation, the Ministry may update, revise, copy, translate, or distribute final materials.

4. Fees
Subject to the terms and conditions of this Agreement, the fee for the work will be an honourarium of _________ for Writers and _________ for Reviewers.

Payment for expenses which qualify for reimbursement shall be made on the basis of invoices or original receipts and expense claim forms that are submitted at the end of your training.

5. Copyright and Permissions
You must cite all sources and obtain any copyright or permission to use materials as required.

If you cannot fulfill the expectations of this project, we would expect you to notify us immediately so that this agreement could be terminated. Failure to comply with the project expectations according to those laid out by the Subject Association and the Ministry of Education will result in the termination of your contract with no remuneration for any work completed.

If you agree with the terms of this Letter of Agreement, please sign, date and have witnessed both copies of this letter and return one (1) copy of the signed letters to the Project Manager.

Thank you for supporting us with this important project.

i agree with all of the above terms and conditions of this agreement.

_________________________          ___________________
Signature of Contractor                         Date

________________________
Signature of Witness

_________________________
Print Name of Witness
Appendix C: Sample Training Session Agenda

Training Session Agenda

Location

Please bring to session:
• travel expense information (mileage printed out from Mapquest) and parking receipts
• curriculum documents
• source or reference materials for developing your resources
• computer (optional, but helpful)

8:30 - 9:00 Arrival, light breakfast

9:00 - 9:30 Welcome, Overview of Project, Administrative Business

9:30 - 10:00 Guest Speakers: Ministry Representatives, Experts in the Field, etc.

10:00 - 11:30 First Brainstorming Session: Writers and Reviewers meet

11:30 - 12:00 Sharing and Feedback: Writers, Reviewers and Project Manager

12:00 - 1:00 Lunch (teams may decide to keep working through lunch)

1:00 - 1:30 Whole Group Session: Template overview, tips for writing, using Google Docs, formatting rules

1:30 - 2:30 Second Brainstorming Session: Writers and Reviewers meet

2:30 - 3:00 Sharing and Feedback

3:00 - 3:30 Teams draw up timeline and plan for writing and review; Expense Claim Forms submitted

3:30 - 4:00 Final questions, farewell
Appendix D: Sample Project Plan for Writing Teams

Ministry of Education Financial Literacy Resource Development Project

Project Outline

Purpose
The purpose of this project is to support the Financial Literacy Initiative outlined by the Ministry of Education’s Working Group on Financial Literacy in A Sound Investment: Financial Literacy Education in Ontario Schools.

For this project, the subject association, in consultation with the Ministry, will develop subject-specific resources for teachers that explore the key concepts of financial literacy in grades 4-12.

Scope
Writing teams will plan and create written resources in divisions for grades 4-6, 7-10, 11-12. These resources could take a variety of shapes, including:

- a series of stand-alone lessons (e.g., 3-6 total) for more than one grade, with ideas for summative evaluation, extension activities and/or resource lists; or
- a series of connected lessons (e.g., 3-5) for a specific grade, with cross-curricular links and ideas for summative evaluation; or
- a unit of study (e.g., 3-5 lessons) for a specific grade and ideas for summative evaluation

Resources developed must be written in the three-part template developed by the Ministry of Education and posted to our Google Docs Group.

Focus
The focus of the resources developed for this project is outlined in the Ministry of Education’s document A Sound Investment: Financial Literacy Education in Ontario Schools and the Financial Literacy Scope and Sequence. Resources can focus on one or more of the following key concepts as they relate to drama or dance:

- the concepts of income, money, earning, saving, spending, investing, budgeting, credit and borrowing, risks and rewards, compound interest, pensions, insurance, taxes, and planning ahead;
- how the financial system works;
- the difference between wants and needs;
- consumer awareness and advertising;
fraud and its consequences; 
future consequences of financial decisions; and 
how to plan for life after high school.

Resources developed must be curriculum linked and:
Support the revised elementary or secondary expectations;
Demonstrate a range of current instructional and assessment practices;
Reflect the key concepts of financial literacy as outlined by the Ministry;
Support ongoing Ministry initiatives related to literacy and numeracy, student success,
environmental education, FNMI, equity, inclusive education, and critical literacy.

Important Consideration For Writing Teams:

Quality over Quantity
We value quality of resources over quantity of resources—more is not necessarily better. Keep lessons 
and units manageable, practical and above all, useful for teachers. Lessons should contain no more than 
3 BLMs (in the form of handouts, rubrics, etc.) In some cases, lessons could refer to BLM materials that 
already exist on the subject association’s website.

Current and Best Practices: Lessons and units should demonstrate timely, innovative content that 
reflects current and best practice in the subject field, assessment and evaluation, etc. It is wise to check 
to ensure that lessons created do not duplicate material already found on the the subject association’s website.

The Use of Source Material and Copyright: Resources must be the original work of the writing teams, 
and should not duplicate material that has been published by the Writers, Reviewers, or others. When 
basing resources on existing source material (e.g. picture books, articles, etc) ensure that these 
materials are in print, widely accessible to teachers across Ontario, and give alternative options if 
possible. Do not use copyrighted material in resources, such as passages from books, graphics, scripts, 
etc. Include such materials as recommended resources with proper bibliographic information in the 
lesson.

Equity and Diversity: Resources should reflect the diversity of students and teachers across Ontario, as 
well as current Ministry policy as it pertains to equity and diversity.

Assessment and Evaluation: Resources should contain strategies and tools for assessment and 
evaluation, including examples of assessment for, as and of learning.

Extensions/Resources: Resources, particularly stand-alone lessons, would greatly benefit from possible 
extension ideas and resource lists for teachers looking to use them as the basis for an expanded study of 
financial literacy.
**Writing and Formatting:** Resources must follow the rules for writing and formatting as outlined in the Rules for Writing and Formatting document available on Google Docs. It is the responsibility of the Review Consultant to ensure that these rules are followed and corrected in the final draft submitted to the Project Manager.

*Role and Responsibilities of Writer/Reviewer:*

**All WRITERS will:**
- Work with the Reviewer to draft an action plan for the creation of resources
- Use a template to be provided based on the Ministry of Education’s Curriculum Branch’s Three-Part Lesson Template
- Include formative activities (process) and culminating activities (product)
- Develop support materials (e.g. handouts, anchor charts, electronic resources)
- Cite all sources and obtains copyright or permission to use materials as needed
- Engage in ongoing dialogue with the Lead Writers/Reviewers and use their feedback to make revisions to the resource by the agreed upon delivery date; and
- Complete and send the draft resources to the Lead Writers/Reviewers by no later than the specified delivery date.

**All REVIEWERS will:**
- Work with the writing team to draft an action plan for the creation of resources and deliver an electronic copy of this action plan to the Project Manager by an agreed-upon date
- Engage in ongoing dialogue with the Writer during the writing process and provide feedback and suggestions for revision
- Act as a subject expert to ensure the document is accurate in terminology and theory, aligns with curriculum expectations and the scope and sequence for Financial Literacy as outlined by the Ministry of Education
- Ensure that the resources developed are free of spelling, grammar and usage errors, are clear and coherent, and are formatted according to the guidelines outlined by the Project Manager
- Send the final product to the Project Manager by the specified delivery date.

**Communication:** It is expected that Writers and Reviewers will engage in ongoing dialogue and feedback throughout the writing process through Google Docs. Teams will draft a plan with timelines for “checking in” to give feedback and revise resources before the final draft is given to Reviewers for final editing. This plan will be given to the Project Manager by the agreed-upon deadline.

Any concerns or questions should be communicated with the Project Manager as soon as possible.
- Any concerns or questions about computer-related issues should be communicated to the Project Technology Lead.
- Any concerns or questions about expenses and/or payment should be communicated to Treasurer.

Whenever issues arise that need additional qualification, advice or follow up, please copy Project Manager on communication.
Appendix E: Guidelines for Formatting

Financial Literacy Resource Project - Guidelines for Formatting

General
Write resources (with the exception of BLMs) directly in Google Docs. Do not cut and paste from another program into Google Docs.

Do not change the font, colour, or size of writing in the Google Docs template. You may use bold (for headings), underlining (for terminology), italics (for questions) and bullets only.

All resources (with the exception of BLMs) should be written using the imperative. The imperative commands or requests an audience to act in a certain way; in this case, the students. Examples:
- Invite students to share their responses with the group.
- Pair students and distribute the graphic organizer.
- Ask students to work together in pairs to complete the Venn diagram.

Common Errors
There is a spell check function on Google Docs that should be used often to review your work. As well, please consult Appendix B for an explanation of the difference between e.g. and i.e. when giving examples.

If in doubt of any writing guidelines, check the Model Lesson.

Expectations and Learning Goals
The main heading of your lesson should contain the course code + colon + title of your lesson in bold. For example:
- Grade 7: Exploring Causes of Poverty
- ADA 10: Roles and Responsibilities in the Drama Classroom

When listing financial literacy and curriculum expectations, include the curriculum area, number and strand, number and sub-strand and full expectation (examples and teacher prompts are not necessary). For example:
Dance

A. Creating, Presenting and Performing

A3. Dance Techniques: demonstrate an understanding of the dance techniques and movement vocabularies of a variety of global dance forms

A3.2 accurately reproduce a range of dynamics and movement techniques from a variety of global dance forms

Learning goals should be prefaced with the words “By the end of this lesson, students will be able to” followed by a bulleted list of learning goals. Learning goals should be written in straightforward, student-friendly language and connect directly to the lesson.

Materials and Terminology

Materials should be written in a vertical list in the order they appear in the lesson. If materials are optional, write “optional” in brackets. The numbers and titles of all BLMs should appear in the materials list.

Terminology should only refer to subject specific terms and concepts, especially those listed in the glossary of the revised curriculum. Any subject specific terminology that is used and should be defined can be listed, with a definition if possible. When the term is used for the first time in the lesson, underline it.

Headings

In all three parts of the lesson, activities should be broken down into discrete actions with headings. Headings consist of the type of grouping > description of activity in bold.

Types of Groupings: Whole Class, Small Group, Pairs, Individual

For example:

Whole Class > Debrief Discussion
Small Group > Venn Diagram of Saving and Spending

Prompts and Questions

If you wish to supply teachers with prompts for specific activities, write them directly after the description of that activity. Write Prompts in bold and questions in italics. For example:

Invite groups to share their paired tableaux. Prompts: What is your initial reaction to this image? How does it connect to our discussion of “risk”? 

Copyright Council of Ontario Drama and Dance Educators, 2012
If you wish to conclude an activity with a longer discussion with many questions, write them separately with the heading “Key Questions for Discussion” and all questions in italics.

**Key Questions for Discussion:**
*What is the difference between saving and spending?*
*Why is it important to save money for the future?*
*Who can help you to make important decisions about saving?*

**Connections, DI, Assessment and Hyperlinks**
Ensure that the information provided is correct and accurate. Connections should be clear, DI should relate to learning styles and modalities (as opposed to simply accommodations for special needs learners), assessment for, and of learning should be clear and accurate, and hyperlinks should be properly linked. To link a website, copy the full address from the address bar. Type the title of the resource and then highlight it with your cursor. Click the icon that looks like a chain link and a pop up window should appear. Paste the address you copied earlier in the field and click “insert.” Your link should look like this example.

**Blackline Masters and Appendices**
A **BLM or blackline master** refers to a handout or resource used in the lesson. BLMs should be numbered sequentially and each should have a name that will appear at the top of the BLM itself. For example:

**BLM #7: What Makes a Good Tableau?**
**BLM #2: Careers in the Arts Research Project Rubric**

List all BLMs in order under “Materials” and when referring to the BLM in the lesson, write the number and title in **bold**. For example:

Distribute copies of **BLM #2 What Makes a Good Tableau?** to the class.

BLMs should be written as separate documents, in Word or another compatible format, as they will be converted to PDF form.

Write BLMs in size 12 Arial font, with headings in bold 14 or 16 point Arial font. Keep them plain and straightforward (avoid graphics, wonky tables, etc.)

All BLMs should have the number at the top left and the type of resource (Student Resource, Teacher Resource, Student/Teacher Resource) on the top right all in italics. All BLMS should have the course code and title of lesson at the top, followed by the name of the BLM in bold (see Appendix B for sample).
An Appendix is a resource for teachers, such as lists of books, websites, etc. that is useful for the lesson as a whole. Appendices should be lettered (A, B, C, etc.) and should follow the same guidelines as BLMs.

When resources are ready to be reviewed, they should be saved as separate attachments and emailed to the Reviewer and then to the Project Manager (consider zipping them in one file). All BLMs should be saved with an attachment name that states the course, name of lesson, name of BLM and BLM number. For example:

ADA1O-rolesandresponsibilities-BLM1whatmakesagooddirector

Sample BLM

BLM #1  Teacher Resource

Grade 7 Dance: Exploring Global Poverty
Causes of Poverty Journal Prompts

text

The Difference Between e.g. and i.e.

e.g.
e.g. stands for the Latin phrase “exempli gratia,” which means “for the sake of example.” It should be used when giving examples or more possibilities for the term in question.

An easy way to remember this is to associate e.g. with “example given.”
Brainstorm the characteristics of a good tableau (e.g. levels, facial expression).

i.e.
i.e. Stands for the Latin phrase “id est,” which means “that is.” You should use it when explaining or rephrasing a sentence.

Usually it has the same meaning as “in other words.”
I like to play cards (i.e. euchre, go fish).
Appendix F: Model Lesson

Investigating Career Options in the Arts

Lesson Overview

ADA 4M: Dramatic Arts, Grade 12, University/College Preparation: This lesson serves as an introduction to a unit of study focused on career options in the arts. In this lesson, students will identify the key skills gained in a secondary dramatic arts program and explore what career paths are best suited to these skills. In subsequent lessons, students will use this learning to research and investigate specific careers of interest to them.

Connections to Financial Literacy

Drama
B. Reflecting, Responding and Analyzing
B3. Connections Beyond the Classroom
  • B3.2: identify current and potential educational and career opportunities in the dramatic arts, and describe the competencies required in those fields

Curriculum Expectations

Drama
Reflecting, Responding and Analyzing
B3. Connections Beyond the Classroom
  • B3.1: outline the responsibilities of a variety of leadership and support roles in drama, including the skills and knowledge required, and evaluate their experiences in these roles in different contexts
  • B3.2: identify skills they have acquired through drama activities and explain how they can contribute to success beyond the classroom

Foundations
C3. Responsible Practices
  • C3.2: demonstrate an understanding of the tasks and responsibilities involved in producing drama works

Learning Goals

By the end of this lesson, students will
  • identify key skills developed in a secondary dramatic arts program
  • identify careers in the arts that utilize these key skills
  • formulate an individual research plan based on one career path of interest to them
Instructional Components and Context

Readiness
Students will have experience in writing and sharing journal entries with peers in a safe and supportive classroom environment. This lesson may be used as follow up to a visit from a guest speaker working in the arts and/or a field trip or in-school performance to a theatre or other arts organization.

Terminology
Tableau
Transition
Anchor chart

Materials
Journals.
Chart paper and markers
Computer Lab access (optional)
BLM #1 Careers of Interest to Me
BLM #2 Career in the Arts Research Project
BLM #3 Rubric for Careers in the Arts Research Project

Lesson Plan

Minds On

Individual > Double Entry Journal Writing
Distribute journals and writing materials to students and ask them to find a quiet spot in the classroom from which to write. Introduce the first prompt of the double-entry journal topic verbally or written on the blackboard.

Entry #1
Describe yourself as a student when you first entered your high school drama program. This may have been in grade nine, or further on in your schooling. How might you describe attitude towards drama? Your strengths and weaknesses? Your interests?

Allow students to freewrite for 5-10 minutes, then ask them to stop wherever they are in their journal, even if it is mid-sentence. Introduce the second prompt and have them continue writing for 5-10 minutes.

Entry #2
Describe yourself as a student now, at this present time in your drama education. How might you describe yourself as a person? As a performer? How have you grown or changed? What are your strengths now?
Small Group > Sharing and Tableau Creation

Form students into groups of 4-5 and invite them to share their journal responses with each other. **Prompts:** Do you share any common experiences in terms of your growth in drama? Based on your journal responses, how would you describe the impact drama can have on a student in high school?

Ask groups to use their journal responses as the basis for paired tableaux. The first tableau should depict their collective experiences as students beginning a high school drama program; the second, a tableau that depicts their experiences at this present moment. Encourage students to consider using abstract images to express these ideas as well as realistic ones. Inform them that when they present, they should have a transition linking their two tableaux; this transition can include creative movement, words of dialogue, etc.

After groups have used the creative process to build their paired tableaux, invite them to present to the class. After presentations, debrief the activity with the class.

**Key Questions for Discussion:**

- *What stood out to you in these tableau presentations?*
- *What patterns or commonalities did you see in the “beginning drama” tableaux? Can you identify with these ideas, feelings and experiences?*
- *What ideas, feelings and experiences were depicted in the “present moment” tableaux?*
- *Based on these tableaux, what impact can drama have on a student? How can they change and grow?*
- *How does drama help to do this?*
- *What key skills or qualities does a drama student possess after studying it in high school?*

Create an anchor chart list of the key skills identified by the class.

**Connections**

**Connections:** Use the anchor chart created in this part of the lesson as the basis for career options in the Activity portion of the lesson. Keep this chart posted in a visible place in the classroom throughout the lesson.

**Differentiation**

Give students the option of a written journal or a paired discussion; invite groups to respond to the journal responses in a drama convention of their choosing, such as creative movement, a short scene, etc.

**Assessment as learning**

By writing about the skills gained during their drama education, students can reflect more deeply on their own style of learning and how that is addressed through drama (i.e. kinesthetic learners may feel they have benefited from the hands-on nature of the learning while others may feel drama has helped their interpersonal skills when interacting with others).
Action!

*Pairs > Careers in the Arts Brainstorm*

Have students find a partner and distribute chart paper and markers to each pair. Ask students to use the anchor chart of skills gained in a drama program to brainstorm potential careers that might be suitable for students who possess them. Encourage them to brainstorm both careers in the arts (i.e. director, arts administration) and those outside traditional arts organizations (i.e. public relations, sales).

Invite pairs to post their chart paper brainstorming on the classroom wall.

*Individual > Careers of Interest to Me*

Invite students to examine the brainstorming posted and pose questions for clarification if needed. Distribute copies of *BLM #1 Careers of Interest to Me* handout to each student and instruct them to make a list of at least three careers they find interesting that they would consider researching further, with a short explanation of their choices.

**Extension Ideas:**

- Consider grouping students based on their chosen fields of interest to brainstorm further, focusing on what they already know about these careers
- Distribute information on careers in the arts (see Hyperlinks to Theatre Ontario’s [Careers in Theatre Resource](https://www.theatreontario.ca/education/career-information)) and ask students to present short scenes outlining the basic information of that field.

*Connections*

**Connections:** When discussing and selecting career paths of interest, refer back to journal writing and the key skills anchor chart, prompting students to reflect on their own strengths as individuals in the drama classroom.

**Assessment for learning:** Circulate during paired discussions and check in with students, giving them ongoing feedback as to their own strengths in the drama.

*Consolidation*

*Whole Class > Careers in the Arts Research Project*

Introduce the culminating activity to the class using *BLM #2 Careers in the Arts Research Project*. Have students choose one of their career selections for the basis of their research, and consider booking the computer lab for subsequent classes for the project.

**Differentiation:** Consider differentiating the Careers in the Arts Research Project based on student learning student (e.g. have students choose between researching a career, interviewing someone in that career, presenting a dramatic piece on that career, making a visual display or portfolio of research information, etc.)

**Assessment of learning:** See *BLM #3 Careers in the Arts Research Project Rubric* as a tool for evaluating the final culminating activity.
Appendix G: Guidelines for Reviewers

Guidelines for Reviewers

General
Create a plan with your writer(s) regarding the scope and focus of the resources to be written. Decide how often you will “check in” with ongoing feedback through Google Docs. Review the technical aspects of the project. Be aware of each other’s responsibilities, strengths and weaknesses.

Check in with ongoing feedback: You have the ability to view the resources being created and offer written feedback. Go to “Insert” and “Comment” and a “sticky note” will come up in which you can write feedback. You can also write directly in the document in a different colour font. You are encouraged to provide extensive feedback—ask questions, provide alternatives or extensions to lessons. This will not only result in stronger resources, but in more professional learning for the writers!

Problem solving: By offering ongoing feedback, you and your writer can solve problems as they emerge; this will result is less time spent correcting work at the end of the writing process. If problems emerge with which you need assistance, contact the Project Manager.

Copyright
Is the resource free of copyrighted material that belongs to someone else?
If concepts or resources are referenced, is proper bibliographic information provided?
If the resource is based on a source, are alternative sources provided if the chosen source is not available?

Curriculum Connections
Does the lesson reference expectations from the Financial Literacy Scope and Sequence?
Does the lesson reference expectations from the Ontario curriculum?
Does the lesson reference expectations from another curriculum, if it is cross-curricular?
Are expectations listed properly (see Guidelines for Writing and Formatting) and free of errors?
Are the expectations listed actually addressed in the lesson?

Learning Goals
Are the learning goals written in student-friendly language?
Are the learning goals actually addressed in the lesson?
Are there additional learning goals that could be added?
Minds On, Action, Consolidation

Does the Minds On activity outlined introduce the focus of the lesson in a clear and interesting way?
Do the Action activities build on the learning from Minds On? Do they have a subject focus?
Does the Consolidation activity truly consolidate learning from the lesson (i.e. provide closure, assessment as learning for students)?
Do the activities described meet the curriculum expectations?
Are the activities outlined appropriate for the grade and subject?
Are the activities creative, innovative and clearly explained?
Are there activities outlined that do not “fit” the rest of the lesson?
Are there extension activities that could be suggested for teachers to take this lesson further?

Questioning

Are teacher prompts provided where necessary? Could more be added?
Are “Key Questions for Discussion” provided where necessary? Could more be added?
Are any questions unclear/confusing/unnecessary/repetitive?

Materials and Terminology

Is the materials list complete? Are materials not listed that appear in the lesson?
Are BLMs listed in the Materials list?
Is the terminology list complete? Is terminology missing that appears in the lesson?
Have the terms listed been underlined when first mentioned in the lesson?

Assessment

Are assessment strategies and tools described in the lesson?
Are there examples of assessment for, as and of learning provided?
Are the assessment strategies accurate (e.g. assessment for learning is not being confused for assessment as learning, etc)?
Are assessment tools provided as BLMs (e.g. rubrics, checklists) OR are assessment tools cited as suggested links?

Connections, DI, Hyperlinks, Accommodations

Are connections made to prior learning and/or other parts of the lesson and/or other subjects?
Are strategies for differentiating instruction clear, accurate and helpful?
Are hyperlinks provided where appropriate? Are they linked correctly?
Are accommodations for special needs students provided where possible?
Could more connections, DI strategies, hyperlinks or accommodations be added?
Formatting
Does the lesson have a title that clearly describes the main focus of the lesson?
Is the grade, course and subject listed correctly?
Are curriculum expectations formatted properly?
Are learning goals written properly (bullets, etc.)?
Are sub-headings used to define each discrete activity in the lesson? Are they formatted correctly (e.g. Whole Class > Mind Map)?
Are instructions written in the imperative mood?
Are questions italicized?
Is terminology underlined when first mentioned?
Are BLMs numbered and titled correctly throughout the lesson?
Are hyperlinks properly linked?
Are BLMs properly formatted (see Guidelines for Writing and Formatting)?

Mechanics
Is the lesson free of spelling errors?
Is the lesson free of grammatical errors?
Is the lesson written in a clear and concise way that is accessible to teachers?

Submitting Finished Resources
When the review process is complete, please contact the Project Manager by email. In the email, attach all BLMs in a zipped folder, properly titled as per the Guidelines for Writing and Formatting.

Appendix H: Sample Action Plan

Action Plan for Critical Literacy-English Resources, Grades 9-10

Writing Project: Critical Literacy Resources
Team Members:

Each of the three writers will create a series of 3 lessons focusing on the following areas:

Writer 1. Decoding Media Messages in Television Commercials (Grade 9 Applied)
Writer 2. Power and Status in Print Advertisements (Grade 9 Academic)
Lead Writer 3. Gender Stereotyping in Music Videos (Grade 10 Academic)
Each lesson will address English expectations from the curriculum, with a focus on developing Critical Literacy skills. Each series of lessons will conclude with a culminating task and assessment tools (checklists, rubrics, etc.)

Plan for Creating Resources:
A skeleton outline of each series of lessons was created during the training session, and each writer has been assigned their topic for their lessons. Writing will happen over the next two weeks online using Google Docs. The Lead Writer will “check in” on each resource at least two times while they are being written to offer feedback to Writers. On __________ all lessons will be handed over to the Lead Writer to forward to Reviewers.