


# School District No 8 (Kootenay Lake) 2014-2015 Preliminary Budget



Prepared by: Kim Morris & Senior  
Leadership Team  
April 22, 2014  
Finance Committee



How will our Preliminary Budget Ensure:

- Student **learning** is at the forefront
- Resources are **aligned** with goals
- Meaningful** input and consultation
- Sustainability**



# Student Expectations

- Academic Success
- Creativity & Imagination
- Citizenship
- Resiliency



# Shifting to...

- Student learning at the forefront of resource allocation decisions and choices
- Mobility and standards; ubiquitous access
- Emphasis on global sustainability and citizenship – changing skillsets required to emerge as adults with the ability to participate fully in efforts toward global sustainability



# New Pedagogy...

- Students as learning leaders
- Focus on bringing criteria for effective learning environments to scale
- Development of skills and competencies as curriculum
- Skills and competencies students need in order to develop new knowledge and use this new knowledge to solve complex world issues and challenges?

# PELP Coherence Framework





# Guiding Principles

- Razor sharp focus on student learning
  - Early Learning

# Guiding Principles

- Significant investment in early learning:
  - 2012-2013            \$384,500
  - 2013-2014            \$458,500
- **Significant investment in early learning**  
**Draft 4 2014-2015**
  - \$300,000 Teacher, EA, Technology (PVP Discretion)
  - \$195,000 Read by Three (LINKS)
  - \$495,000 Total





# Guiding Principles

- Razor sharp focus on student learning
  - District-wide strategies to create networks for adult learning and capacity building focusing on identified student need



# Identified Student Need

- District Achievement Gaps
  - Gender
  - Higher Order Thinking Skills
  - Informational Text
  - Poverty
  - Social and Emotional Well-being
  - Aboriginal Learners
  - True Non-Completers

# Guiding Principles

- Capacity building to focus on student learning:
  - 2012-2013 \$ 311,700
  - 2013-2014 \$ 211,250
- **Capacity building to focus on student learning Draft 4 2014-2015:**
  - **\$168,750 – 5 Key Initiatives to be scaled to budget or prioritized**



# Guiding Principles

- Razor sharp focus on student learning
  - Staffing diverse adults with varying roles to work beside students to build student capacity

2013-2014	Enrolment	Staffing Give	French	LIF	Ab Ed	School Trust	School Allocations	International	INADS	Total
ARES	336.000	18.074		0.086						18.160
Blewett	121.000	7.075								7.075
Brent Kennedy	232.000	12.474		0.370	0.150					12.994
CLES	147.000	7.749		0.100						7.849
Crawford Bay	71.594	5.450			0.090					5.540
DESK (ALL YEAR)	222.000	6.230								6.230
Erickson	178.000	9.324								9.324
HOMELINKS (ALL SITES)	212.375	7.227					0.400			7.627
Hume	200.000	11.099								11.099
Jewett	15.000	1.475								1.475
JVH	224.375	13.042		0.330	0.500					13.872
LVR (includes Reach)	686.625	35.200	0.281	0.125	0.286	1.094		1.391	0.286	38.663
Mt Sentinel	331.000	17.900			0.141	0.125				18.166
PCSS	518.063	28.267		0.757		0.664		0.563		30.251
Redfish	94.000	6.000		0.100						6.100
Rosemont	112.000	6.975								6.975
Salmo Elem	180.000	9.239		0.458						9.697
Salmo Sec	86.500	6.035		-	0.706					6.741
South Nelson	182.000	10.399		0.320						10.719
Trafalgar (sec)	412.000	23.567		0.291	0.480					24.338
WEG	65.000	4.175		0.194	0.101					4.470
Wildflower	134.000	8.249								8.249
Winlaw	92.000	5.500			0.105					5.605
Yahk	19.000	1.575		0.042						1.617
District		12.600								12.600
<b>TOTAL FTE</b>	<b>4,871.532</b>	<b>274.900</b>	<b>0.281</b>	<b>3.173</b>	<b>2.559</b>	<b>1.883</b>	<b>0.400</b>	<b>1.954</b>	<b>0.286</b>	<b>285.436</b>
PVP		- 33.900								- 33.900
Contingency		4.000								1.625
Teacher Staffing		245.000								253.161
Give		-								-
<b>Teacher Staffing Total</b>		<b>245.000</b>	<b>0.281</b>	<b>3.173</b>	<b>2.559</b>	<b>1.883</b>	<b>0.400</b>	<b>1.954</b>	<b>0.286</b>	<b>253.161</b>

2014-2015	Enrolment	Staffing Give
<b>ARES</b>	<b>323.000</b>	17.492
<b>Blewett</b>	<b>137.000</b>	8.517
<b>Brent Kennedy</b>	<b>221.000</b>	12.397
<b>CLES</b>	134.000	8.494
<b>Crawford Bay</b>	<b>65.000</b>	4.490
<b>DESK (ALL YEAR)</b>	<b>150.000</b>	4.375
<b>Erickson</b>	182.000	11.208
<b>HOMELINKS (ALL SITES)</b>	<b>201.000</b>	5.833
<b>Hume</b>	196.000	12.250
<b>Jewett</b>	<b>15.000</b>	1.439
<b>JVH</b>	<b>235.000</b>	12.681
<b>LVR (includes Reach)</b>	<b>717.000</b>	30.489
<b>Mt Sentinel</b>	<b>320.000</b>	14.161
<b>PCSS</b>	<b>487.000</b>	21.030
<b>Redfish</b>	<b>87.000</b>	6.025
<b>Rosemont</b>	<b>108.000</b>	7.216
<b>Salmo Elem</b>	<b>189.000</b>	11.120
<b>Salmo Sec</b>	<b>74.375</b>	4.154
<b>South Nelson</b>	<b>180.000</b>	11.002
<b>Trafalgar (sec)</b>	<b>371.000</b>	16.402
<b>WEG</b>	<b>56.000</b>	4.120
<b>Wildflower</b>	<b>141.000</b>	8.100
<b>Winlaw</b>	<b>110.000</b>	7.375
<b>Yahk</b>	<b>17.000</b>	1.407
<b>District</b>		12.100
<b>TOTAL FTE</b>	<b>4,716.375</b>	253.877
<b>PVP</b>		- 31.000
<b>Contingency</b>		3.000
<b>Teacher Staffing</b>		225.877
<b>Give</b>		14.123
<b>Teacher Staffing Total</b>		240.000
<b>Estimated French</b>		0.281
<b>Estimated LIF</b>		3.173
<b>Estimated AB Ed</b>		2.500
<b>Estimated School Trust</b>		1.900
<b>Estimated School Allocations</b>		0.400
<b>Estimated International</b>		1.950
<b>Estimated INADS</b>		0.286
<b>Estimated Total Teacher Staffing</b>		250.490





# Guiding Principles

- Commitment to Capital Investments to Support Student Learning



# Guiding Principles

- Capital Investments:
  - 2012-2013                      \$222,100
  - 2013-2014                      \$440,918
- **Capital Investments Draft 4 2014-2015**
  - \$200,000 Technology Evergreen
  - \$ 40,000 Vehicle Fleet
  - \$ 78,818 Additional Journeyman/Operations Crew
  - \$ 72,100 Secondary IE Shop Upgrades
  - \$390,918 Total



# Budgeting for Staffing - Supporting Learners with Staffing

# The Steps in this process

- Enrolment information gathered, starting in February and updated each month
- Transfer information – 131 transfers processed by April 17, 2014
- Kindergarten registrations vetted against catchment boundaries and transfer requests received



## The Steps in this process (cont.)

- Initial “Give” allocated by district staff in March/April – totalling approximately 14 FTE
- Directors of HR, Innovative Learning, and Independent Learning are meeting with administrators on April 25, May 1, and May 2 to discuss student learning needs for schools for additional Ask



## The Steps in this process (cont.)

- Second “Give” will be determined after this process (approximately 10 FTE – plus allocations for Early Learning, Ab Ed, and other amounts from Innovative Learning and Independent Learning)
- It will include allocations based on updated enrolment to May



# Budget Considerations

- We started with the legislated requirement:
  - Legislated class size max/class configurations (22, 24, 30)
- With our Enrolment projections for next year (Approximately 155FTE fewer students projected for next year) we project 5 fewer classrooms



# Budget Considerations

- We ask each school to consider their staffing needs based on learning needs in their particular location
- We also ask them to consider the learning needs of their Family of Schools
- Budgeted FTE for teacher staffing: 240FTE
  - Includes 31 FTE PVP (down from 34 last year)
  - Includes 3 FTE contingency (down from 4 last year)



# Considerations

- Overall ask
- Individual school and Family of Schools' ask
- LIF taken out – separate ask
- Small, rural schools – complexity of grades
- Comparison of FTE year over year
- Student transfer considerations will be based on Enrolment update on May 2





# Considerations, cont.

- Transfers for out of catchment are complete – all applications now will be waitlist until September 8th
- ELL Included in initial staffing allocation
- Class pressures not anticipated in spring can be determined with contingency in September – depends on enrolment.
- School purchase – still to determine by school
- Ability of school to meet student learning needs – alignment of staff to attend to learning



# Current staffing - KNOWN

- Leaves of Absence info due by April 30th
- So far:
  - 5 + FTE Parental Leaves (full or part year)
  - 2 + FTE full year Personal Leaves
  - 3 + FTE partial Personal Leaves
  - 1 + FTE unpaid Medical Leaves
  - 1 + FTE known Retirements



# Current Staffing

- 2 FTE returns from Personal Leave
- 2 FTE return from Parental Leave
- Teacher transfer requests and possible teacher transfers to attend to organizational needs
- Some postings due to needs in schools

# Clerical Staffing

- Reductions:

- 2013-2014 Schools 71 Hours

- 2013-2014 DL 50 Hours

- 2013-2014 SBO 52 Hours

- Additions:

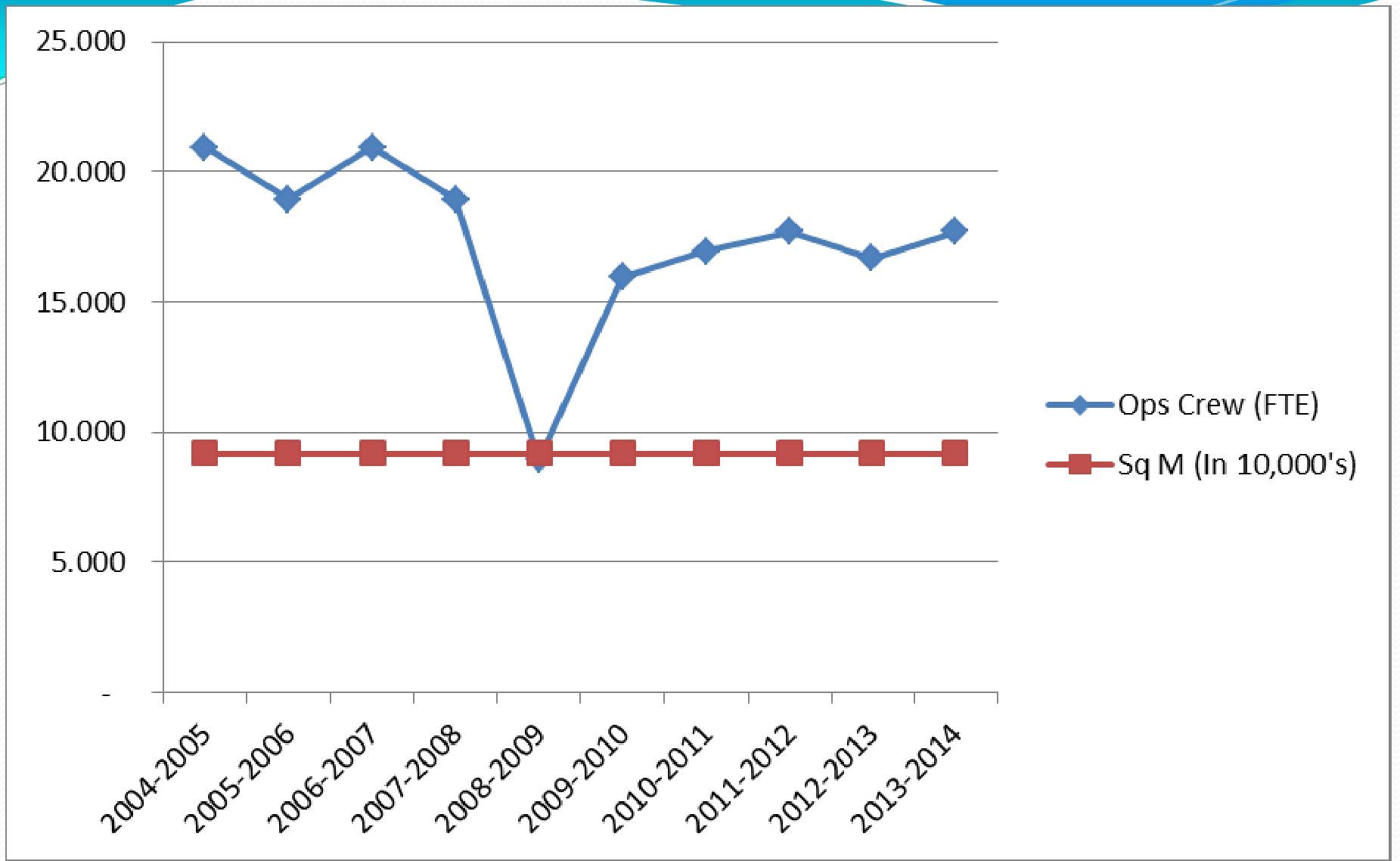
- 2014-2015 Schools 35 Hours

50% of last year's reduction



# Operations Crew Staffing

- Maintains the crew
- Moves 1.0 FTE salary and benefits from operating to AFG
- **MUST REMEMBER:** If AFG funding is reduced in future we must move FTE back to operating.
- We cannot reduce the crew.
- We have not reduced the number of:
  - Buildings
  - Acreage
  - Square metres



# Bus Fees

Fiscal Year	Revenue	Receivable	Paid	
2012-2013	52,430			
2013-2014	23,990			
	76,420	40,930	35,490	
	Fee Payment Rate:		46%	April 2, 2014
	Fee Payment Rate:		30%	May 7, 2013



# Bus Fees

- Draft 4 reflects \$29,200 in revenue
- Improvement over 2012-2013?
  - Increased collection rate to 46% from 30%
  - Reduced seats = reduced runs by 50 hours
  - Bus pass implementation
  - Manage/change expectations
- Creates revenue for student learning

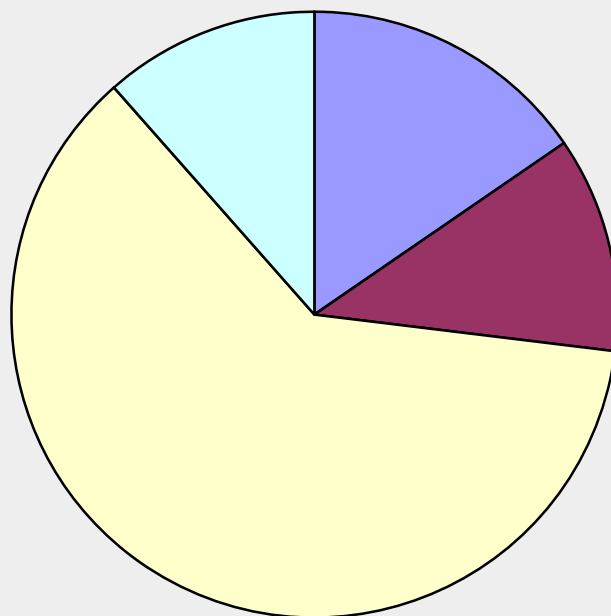




# Survey Results

- Stakeholder Presentations/Wish Lists
- Superintendent's Recommendations/Balancing Strategies
- Long List
  
- Top 7
- Bottom 7

Please indicate in which role you are completing this survey.



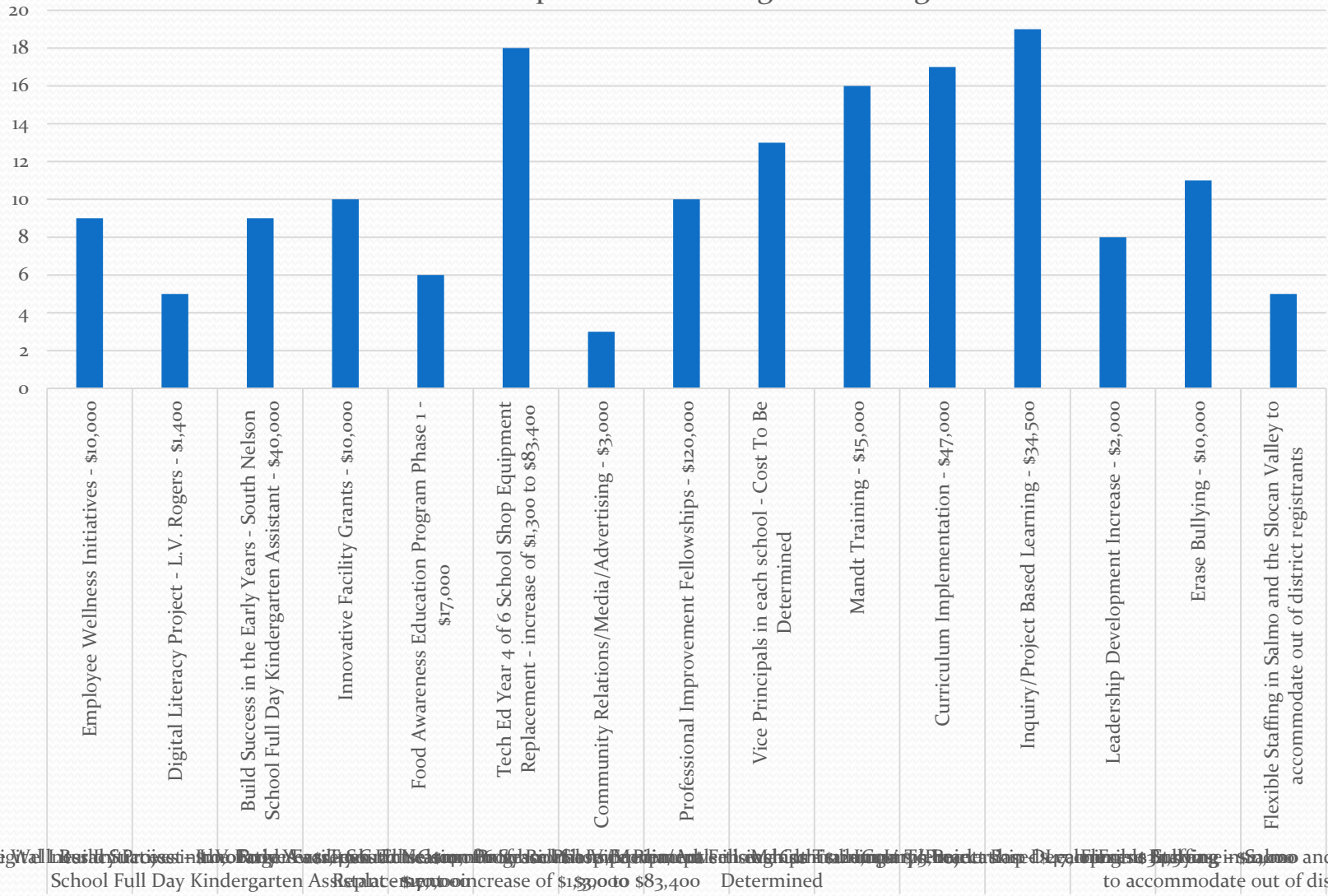
■ Trustee

■ Stakeholder Representative

□ Principal/Vice Principal

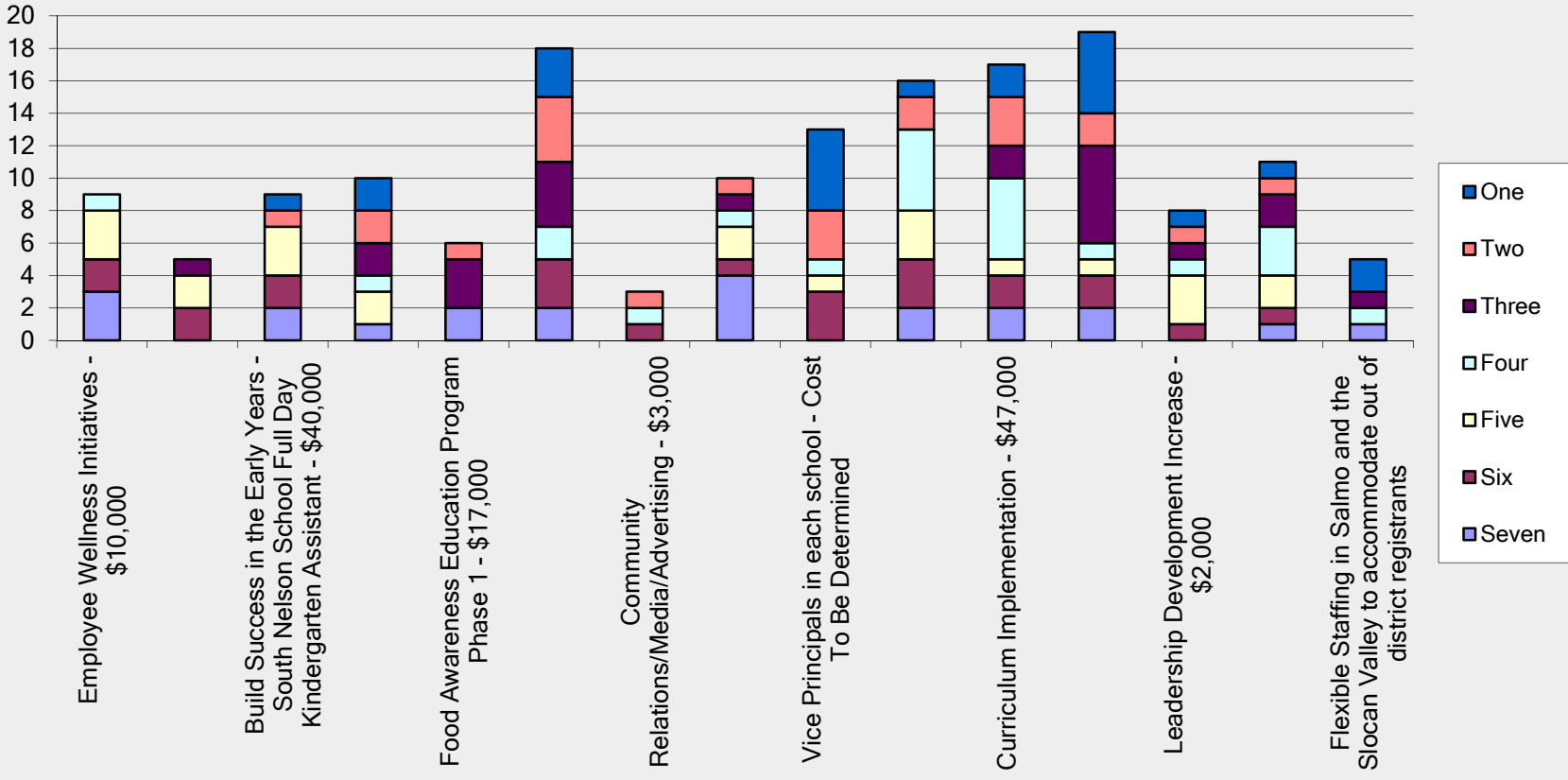
□ District Administrator

## Stakeholder Requests Top Priorities: Weighted Average

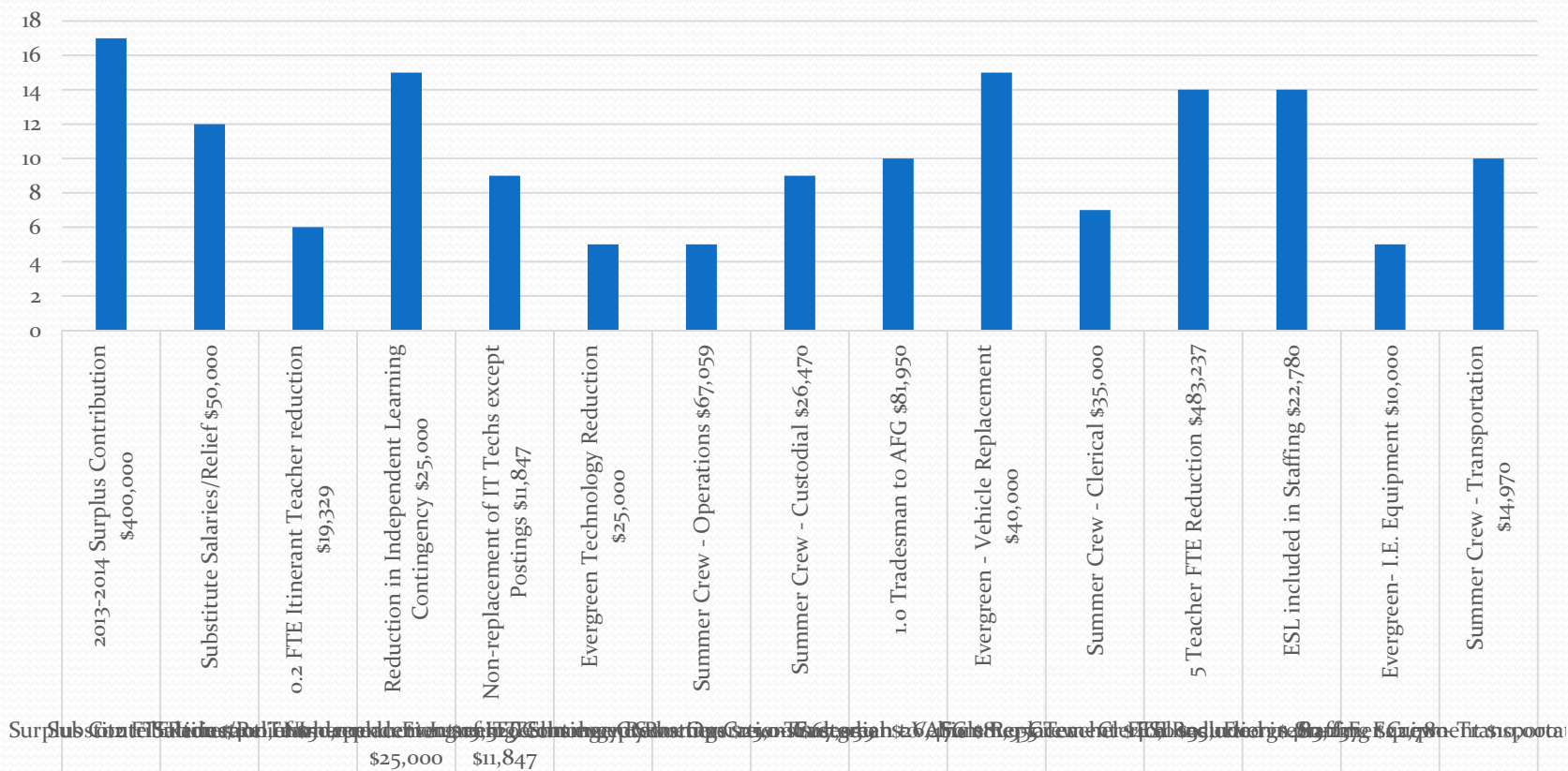


Answer Options	One	Two	Three	Four	Five	Six	Seven	Response Count
Employee Wellness Initiatives - \$10,000	0	0	0	1	3	2	3	9
Digital Literacy Project - L.V. Rogers - \$1,400	0	0	1	0	2	2	0	5
Build Build Success in the Early Years - South	1	1	0	0	3	2	2	9
Innovative Innovative Facility Grants - \$10,000	2	2	2	1	2	0	1	10
Food Food Awareness Education Program	0	1	3	0	0	0	2	6
Tech Ed Tech Ed Year 4 of 6 School Shop	3	4	4	2	0	3	2	18
Community Community Relations/Media/Advertising -	0	1	0	1	0	1	0	3
Professional Improvement Fellowships - \$120,000	0	1	1	1	2	1	4	10
Vice Vice Principals in each school - Cost To	5	3	0	1	1	3	0	13
Mandt Mandt Training - \$15,000	1	2	0	5	3	3	2	16
Curriculum Curriculum Implementation - \$47,000	2	3	2	5	1	2	2	17
Inquiry/Project Based Learning - \$34,500	5	2	6	1	1	2	2	19
Leadership Development Increase - \$2,000	1	1	1	1	3	1	0	8
Erase Erase Bullying - \$10,000	1	1	2	3	2	1	1	11
Flexible Flexible Staffing in Salmo and the Slocan	2	0	1	1	0	0	1	5
Other (please specify)								0
<i>answered question</i>								23
<i>skipped question</i>								3

Please select your top seven priorities from the list below. 1 is your highest priority and 7 is your lowest priority.

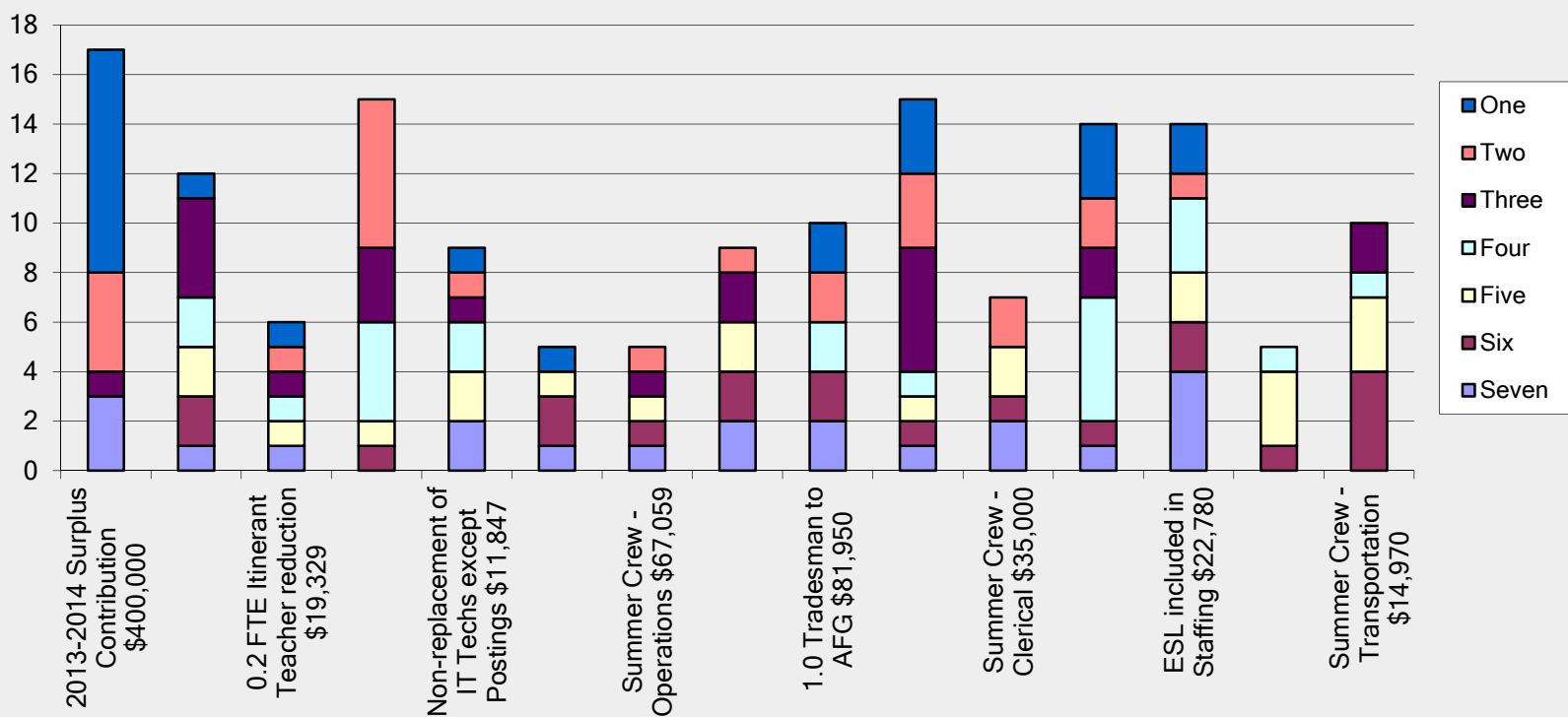


## Weighted Value Balancing Strategies: Short List



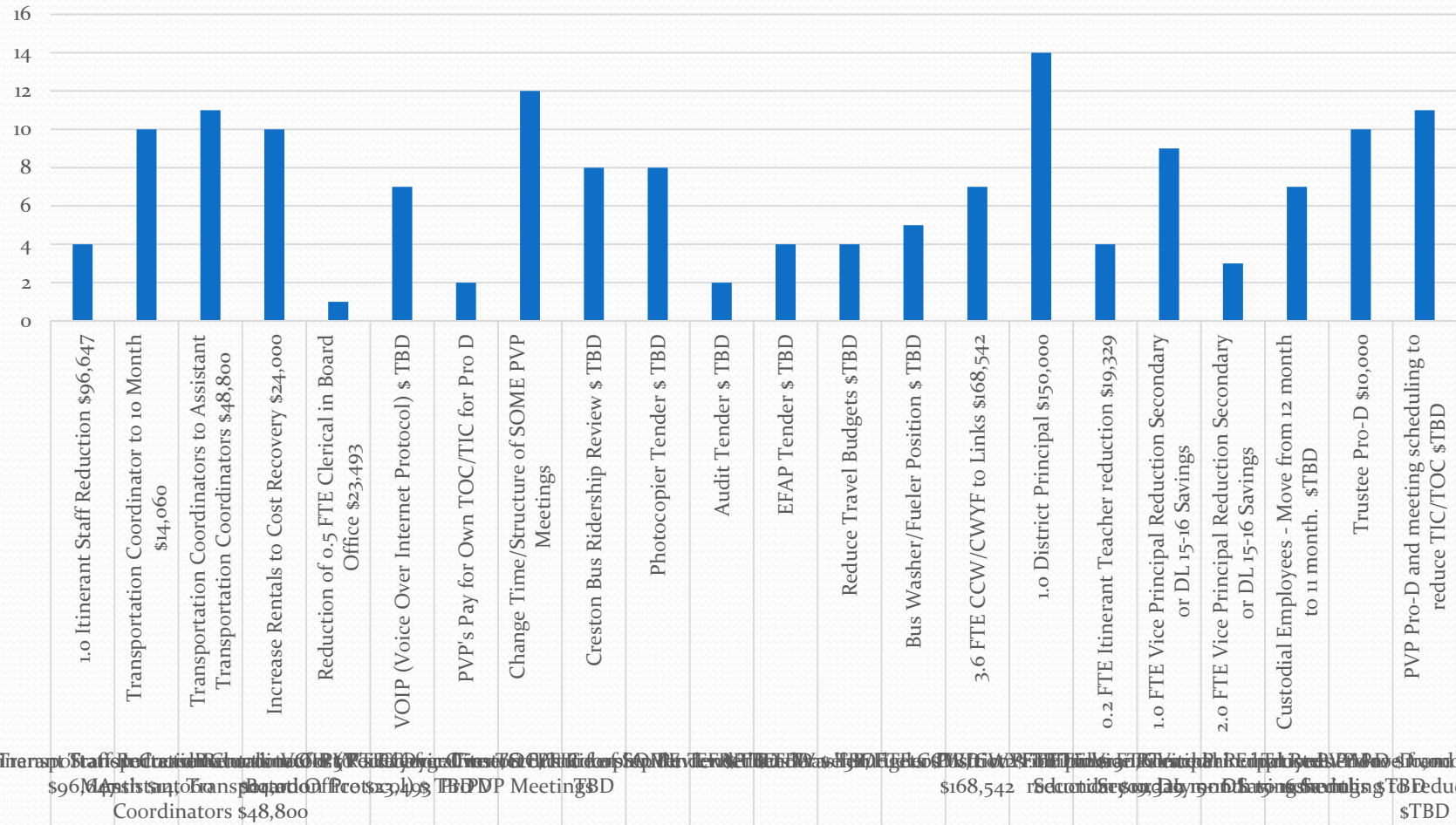


Please select your seven most highly favored Balancing Strategies from the list below. 1 is your most highly favored strategy, and 7 is your least favored strategy.



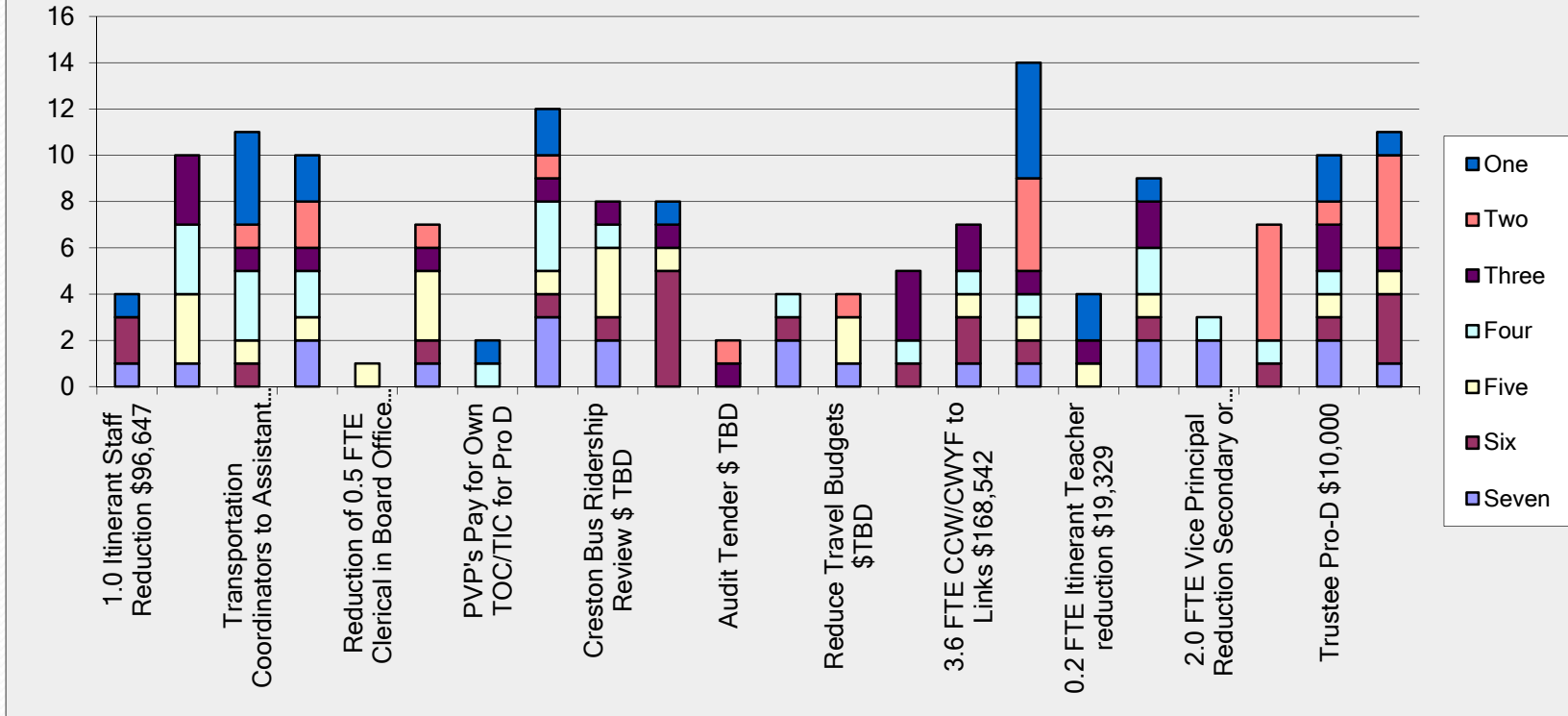


## Weighted Average: Balancing Strategies Long List



Answer Options	One	Two	Three	Four	Five	Six	Seven	Response Count
1.0 Itinerant Staff Reduction \$96,647	1	0	0	0	0	2	1	4
Transportat Transportation Coordinator to 10 Month	0	0	3	3	3	0	1	10
Transportat Transportation Coordinators to Assistant	4	1	1	3	1	1	0	11
Increase Increase Rentals to Cost Recovery	2	2	1	2	1	0	2	10
Reduction of 0.5 FTE Clerical in Board Office \$23,493	0	0	0	0	1	0	0	1
VOIP VOIP (Voice Over Internet Protocol) \$	0	1	1	0	3	1	1	7
PVP's Pay PVP's Pay for Own TOC/TIC for Pro D	1	0	0	1	0	0	0	2
Change Change Time/Structure of SOME PVP	2	1	1	3	1	1	3	12
Creston Creston Bus Ridership Review \$ TBD	0	0	1	1	3	1	2	8
Photocopier Tender \$ TBD	1	0	1	0	1	5	0	8
Audit Audit Tender \$ TBD	0	1	1	0	0	0	0	2
EFAP EFAP Tender \$ TBD	0	0	0	1	0	1	2	4
Reduce Reduce Travel Budgets \$TBD	0	1	0	0	2	0	1	4
Bus Bus Washer/Fueler Position \$ TBD	0	0	3	1	0	1	0	5
3.6 FTE 3.6 FTE CCW/CWYF to Links \$168,542	0	0	2	1	1	2	1	7
1.0 District 1.0 District Principal \$150,000	5	4	1	1	1	1	1	14
0.2 FTE 0.2 FTE Itinerant Teacher reduction	2	0	1	0	1	0	0	4
1.0 FTE 1.0 FTE Vice Principal Reduction	1	0	2	2	1	1	2	9
2.0 FTE 2.0 FTE Vice Principal Reduction	0	0	0	1	0	0	2	3
Custodial Custodial Employees - Move from 12	0	5	0	1	0	1	0	7
Trustee Pro- Trustee Pro-D \$10,000	2	1	2	1	1	1	2	10
PVP Pro-D PVP Pro-D and meeting scheduling to	1	4	1	0	1	3	1	11
Other (please specify)								0
<i>answered question</i>								22
<i>skipped question</i>								4

Please select your seven most highly favored Future Balancing Strategies from the list below. 1 is your most highly favored strategy, and 7 is your least favored strategy.





# Other Considerations - LINKS

- **L**earning **I**nvolves **N**utrition & **K**nowledge
- Policy:
  - Effective programs directly supporting vulnerable students
  - Target funding to vulnerable students
  - Support family & community involvement
  - Partnerships to integrated approach to supporting vulnerable students



# LINKS

- 2013-2014 Logic Model to meet Ministry Policy:
  - \$565,855 Annual Funding
  - Formal Assessment/Measures Implementation
  - Target funding to vulnerable students using:
    - Early Development Instrument
    - McCreary Adolescent Health Survey
    - 2010 Social Services Index
    - SD8 At Risk for Literacy Assessment
    - Socio-Economic Status Report
    - Family of School relationship with students and families

# LINKS

Description	2012-2013	2013-2014	2014-2015	Difference
Community School	\$50,000	\$50,000	\$0 (Included in Family of Schools)	Decrease (\$50,000)
School Meals	\$125,000	\$125,000	\$110,000	Decrease (\$15,000)
Grade 5 Reading Assessment	\$0	\$25,000	\$20,000	Decrease (\$5,000)
At Risk/Read by 3	\$194,480	\$165,500	\$195,000	Increase \$30,000
Family of Schools	\$140,375	\$200,355	\$240,685 (Includes WEG)	Increase \$40,330



# Annual Facilities Grant

- Spending plan approval requested April 22, 2014 for April 30, 2014 Ministry deadline
- Short notice/short deadline 14-15
- Forms part of the annual budget in Special Purpose Funds

<b>AFG Allocation 2014 / 2015</b>		
	Capital Portion	\$ 1,095,952
	Operating Portion	\$ 303,387
	<b>Total</b>	<b>\$ 1,399,339</b>
<b>Spending Category</b>		<b>Total</b>
CAMS		\$ 23,799
PLNet		84,487
Tradesman		81,950
Roofing		470,000
Mechanical		416,500
Electrical		35,000
Flooring		23,500
Carpentry		103,000
Painting		30,000
Gym Floors		25,000
Grounds		66,103
Paving		35,000
Misc		5,000
		<b>\$ 1,399,339</b>





# Superintendent's Recommendations

- Instructional Core Alignment
- Early Learning
- Capacity Building
- Non-Enrolling Staffing
- Evergreen for Sustainability
- Contingencies
- Maintains Reserves

# Superintendent

## Recommendations: Draft 3 to 4

Superintendent's Recommendations / Balancing Strategies			
13-14 Surplus Appropriation	District	(400,000)	No change
0.2 FTE Itinerant Teacher Reduction	Independent	(19,329)	Change
Substitute Salaries/Relief (13-14 budget < 162,944 less than status quo)	District	(50,000)	No change
School Clerical Formula Application less \$35,000 Savings	Schools	(46,120)	New
Independent Learning Contingency	Independent	(25,000)	No change
Non-replacement IT Techs except Postings	IT	(11,847)	No change
Summer Crew - Operations	Ops	(67,059)	No change
Summer Crew - Custodial	Ops	(26,470)	No change
1.0 FTE Tradesman to AFG	Ops	(81,950)	No change
Evergreen - Vehicle Replacement	Ops	(40,000)	No change
Summer Crew - Clerical	Schools	(35,000)	No change
5 Teacher FTE Reduction	Schools	(483,237)	No change
ESL Included in Staffing	Schools	(22,780)	No change
Evergreen - IE Equipment	Schools	(10,000)	No Change
Summer Crew - Transportation	Trans	(14,970)	No Change
Mandt Training	Independent	10,000	New from Achievement
Erase Bullying	Independent	10,000	New from Achievement
Learning Initiatives Reduction (TOC time/Meeting Time Scheduling)	Innovative	(17,750)	New
Photocopier Tender Partial Year Savings	District	(20,000)	New
Trustee Pro-D Reduction	Governance	(5,000)	New
PVP Meeting TOC's (Re-Scheduling) and PVP Pro-D TOC Cost Sharing	Schools	(11,000)	New



# Superintendent's Recommendations

- Contingencies to address Sept-June pressures:
  - \$127,553 INADS/Special Needs built into supplies
  - 3.0 FTE Teachers to address enrolment pressures built into wages
  - \$148,730 Benefits
- Reserves:
  - \$ 76,000 International (after 13-14 year end)
  - \$500,000 Operating

# Achievement Plan Summary

- Draft 4

Achievement: Technology to Support Learning	36,500
Achievement: Leadership Development	24,500
Achievement: Inquiry/Project Based Learning	24,000
Achievement: Succss for All/Capacity Building	36,750
Achievement: Curriculum Implementation	47,000
	-
	168,750



# Independent Learning Initiatives

- Draft 4
- Mandt Training \$15,000
- Learning Support Teacher Capacity Building  
\$25,000
- Erase Bullying \$10,000
  
- **Total \$50,000**

# Stats: 11-12 to 14-15

	Amended 11-12	Amended 12-13	Amended 13-14	Preliminary 14-15 (Draft 4)	Change 13-14 to 14-15
Enrolment	4,898 FTE	4,932 FTE	4,871 FTE	4716.375	Decrease 155
Operating Grant	\$49,445,147	\$48,732,944	\$50,108,358	\$49,316,851	Decrease \$791,507
Funding Protection	\$998,265	\$440,301	\$473,030	\$666,087	Increase \$193,057
Contingency Fund	\$166,113	\$500,000	\$500,000	\$500,000	No Change
Previous Yr Surplus - District	\$274,352	\$503,569	\$1,880,007	\$400,000 Estimate	Decrease \$1,480,007
Budget By- law	\$52,526,534	\$59,319,939	\$59,015,676	\$57,560,560	Decrease \$1,455,116

# Draft 4


- By-Law – Second/Third and Final Reading
- Operating \$49,893,978
- Special Purpose \$ 4,416,120
- Capital \$ 3,250,462
- Total by-law \$57,560,560



# Guiding Principles

- Coherent alignment of resources with focus on the instructional core
- Razor sharp focus on student learning
- Commitment to Capital Investments to Support Student Learning





How will our Preliminary Budget Ensure:

- Student **learning** is at the forefront
- Resources are **aligned** with goals
- Meaningful** input and consultation
- Sustainability**



# Timeframe

- April 22 – Third Reading
- April 30 – Submission to Ministry
- May 1 – Staffing Processes Commence
- June 30 – Staffing Processes Conclude