

2015-2016 Budget

School District No. 8 (Kootenay Lake)
Budget Stakeholder Engagement Committee
Kim Morris, Secretary-Treasurer
March 10, 2015

2015-2016 Budget

Effective Resource Allocation:

Organizational goal alignment

Student/learning centred

Sustainable

Consultative

Diverse input

2015-2016 Preliminary Budget - Draft 3 Preliminary / March 10, 2015

OPERATING

	BUDGET DOLLARS							
	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>I</i>	<i>J</i>
	2014-2015	Structural Deficit 2015-2016	2014-2015 Carry Forwards	Draft 1 Preliminary	Draft 2 Changes	Draft 3 Changes	2015-2016 Preliminary	Total Change
Funded FTE	4,759	4,708			56		4,764	5
Revenue								
Operating Grant - MOE	47,260,703	46,594,328			313,856		46,908,184	-352,519
Less: INAC Operating Grant	-204,000	-225,830			21,830		-204,000	0
Less: Strike Savings	-1,522,791	0					0	1,522,791
Less: 1% Administrative Savings (based on BC FTE)						-260,130	-260,130	-260,130
Add: Teacher Collective Agreement Increase	754,070	0			754,070		754,070	0
Add: Audit Over-Clawback	113,046	0					0	-113,046
Total Operating Grant - MOE	46,401,028	46,368,498	0	0	1,089,756	-260,130	47,198,124	797,096

	BUDGET DOLLARS							
	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>I</i>	<i>J</i>
	2014-2015	Structural Deficit 2015-2016	2014-2015 Carry Forwards	Draft 1 Preliminary	Draft 2 Changes	Draft 3 Changes	2015-2016 Preliminary	Total Change
Other Revenue:								
Local Education Agreement	204,000	225,830			-21,830		204,000	0
FSA Scoring	7,200	7,200					7,200	0
Provincial Exam Marking	1,496	1,496					1,496	0
Pay Equity	300,996	300,996					300,996	0
MOE - Education Guarantee	76,000	76,000					76,000	0
MOE - Cabon Reimbursement	76,000	76,000					76,000	0
MCFD - Physio/Occupational Therapy	95,025	95,025					95,025	0
IHA - Health Promoting Schools	30,805	30,805					30,805	0
Tuition - International	926,790	926,790					926,790	0
Homestay Fees Revenue - International	481,600	481,600					481,600	0
Miscellaneous	99,941	78,046		-6,863			71,183	28,758
DASH/ASSAI Grants	50,000	50,000					50,000	0
Industry Training Authority	50,000	50,000					50,000	0
Cultural	10,500	3,800					3,800	6,700
Rentals & Community Use of Facilities	164,049	164,049					164,049	0
Private School Bussing	43,000	43,000					43,000	0
Out of Catchment Bussing Fees	29,200	29,200					29,200	0
Interest	96,258	46,258			50,000		96,258	0
Surplus (less Reserve)	1,797,090	0				400,000	400,000	1,397,090
Total Revenue	50,940,978	49,054,593	0	-6,863	1,117,926	139,870	50,305,526	2,229,644

<i>A</i>	<i>B</i>	<i>C</i>	BUDGET DOLLARS				<i>I</i>	<i>J</i>
			Draft 1 Preliminary	Draft 2 Changes	Draft 3 Changes	2015-2016 Preliminary		
2014-2015	Structural Deficit 2015-2016	2014-2015 Carry Forwards						

Salaries

Teachers	18,573,768	18,573,768		489,023			19,062,791	489,023
Principals Vice Principals	2,876,528	2,876,528		93,794			2,970,322	93,794
Educational Assistants	2,715,550	2,715,550		27,156			2,742,706	27,156
Aboriginal Support Workers	259,263	259,263		2,593			261,856	2,593
Noon Hour Supervisors	225,870	225,870		2,259			228,129	2,259
Clerical - Office	1,374,576	1,374,576		13,746	64,022		1,452,344	77,768
Clerical - Library	115,552	115,552		1,156			116,708	1,156
Maintenance	897,305	897,305		8,973			906,278	8,973
Grounds	145,539	145,539		1,455			146,994	1,455
Custodial	1,710,071	1,710,071		17,101			1,727,172	17,101
Info Tech	330,443	330,443		3,304			333,747	3,304
Bus Drivers	1,168,825	1,168,825		11,688			1,180,513	11,688
Other Professionals	1,135,460	1,135,460		-39,060	10,000		1,106,400	-29,060
Trustees	98,801	98,801					98,801	0
Substitutes	1,375,946	1,375,946		-13,105			1,362,841	-13,105
Sub-Total - Salaries	33,003,497	33,003,497	0	0	620,082	74,022	33,697,601	694,104
Benefits	9,245,866	9,245,866		28,051	236,487	24,377	9,534,781	288,915
Sub-Total - Salaries & Benefits	42,249,363	42,249,363	0	28,051	856,569	98,399	43,232,382	983,019

	BUDGET DOLLARS							
<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>I</i>	<i>J</i>	
2014-2015	Structural Deficit 2015-2016	2014-2015 Carry Forwards	Draft 1 Preliminary	Draft 2 Changes	Draft 3 Changes	2015-2016 Preliminary	Total Change	
Supplies & Services								
Services	927,651	927,651	0	0	0	-89,407	838,244	-89,407
Student Transportation	30,000	30,000	0	0	0	5,000	35,000	5,000
Professional Development & Travel	1,083,976	1,083,976	0	0	0	-461,778	622,198	-461,778
Rentals & Leases	161,002	161,002	0	0	0	-3,838	157,164	-3,838
Dues & Fees	236,072	236,072	0	0	0	-182,896	53,176	-182,896
Insurance	191,100	191,100	0	0	0	-27,000	164,100	-27,000
Supplies (Includes Surplus)	4,498,771	4,498,771		-32,338	0	-515,965	3,950,468	-548,303
Utilities	1,391,474	1,391,474	0	0	0	102,445	1,493,919	102,445
Contingency - Independent Learning	0	0	0	0	0	127,000	127,000	127,000
Capital Assets Purchased Transfers	171,569	0	0	0	0	0	0	-171,569
Surplus	0	-1,397,090				1,397,090	0	0
Sub-Total - Supplies & Services	8,691,615	7,122,956	0	-32,338	0	350,651	7,441,269	-1,250,346
Total Expenditures	50,940,978	49,372,319	0	-4,287	856,569	449,050	50,673,651	-267,327
Surplus/(Deficit)	0	-317,726	0	-2,576	261,357	-309,180	-368,125	1,962,317

Assumptions

2015-2016 Preliminary Budget - Draft 3 Preliminary / March 10, 2015

Assumptions:

Included in Draft 1	
Status Quo 2014-2015 with adjustments for:	
- Decrease: Carry forwards from revenue and expense	(1,397,090)
- Decrease: One Time Revenue Reductions (CBT, MOE, UBCM Grants)	(6,863)
- Decrease: Elections Expense	(29,000)
- Increase: Lifesize (remote meeting system) Video Conference Server License	12,500
- Decrease: Learning Centre/Alternate School Lease Expense	(15,838)
- Increase: CUPE Wages 1% (July 1, 2015) Estimate	88,295
- Increase: CUPE Benefits Estimate	28,051

Assumptions

Included in Draft 2	
Status Quo 2014-2015 with adjustments for:	
- Operating Revenue Estimated for Enrolment Projection	(352,519)
- Reduction of Living on Reserve band Aboriginal Students	(21,830)
- Continued Wage Increase Supplement as 14-15 for Teacher Increases	754,070
- No funding protection	
- Increased Interest Revenue	50,000
- Teacher Staffing: 240 FTE Status quo 14-15 at new CA Rate	489,023
- PVP Staffed Full Time less French Coord and DVP of Innovative	93,794
- 1% Increase for CUPE per New CA	89,430
- Benefits Updated for Changes to Wages & Benefits Analysis	236,487

Assumptions

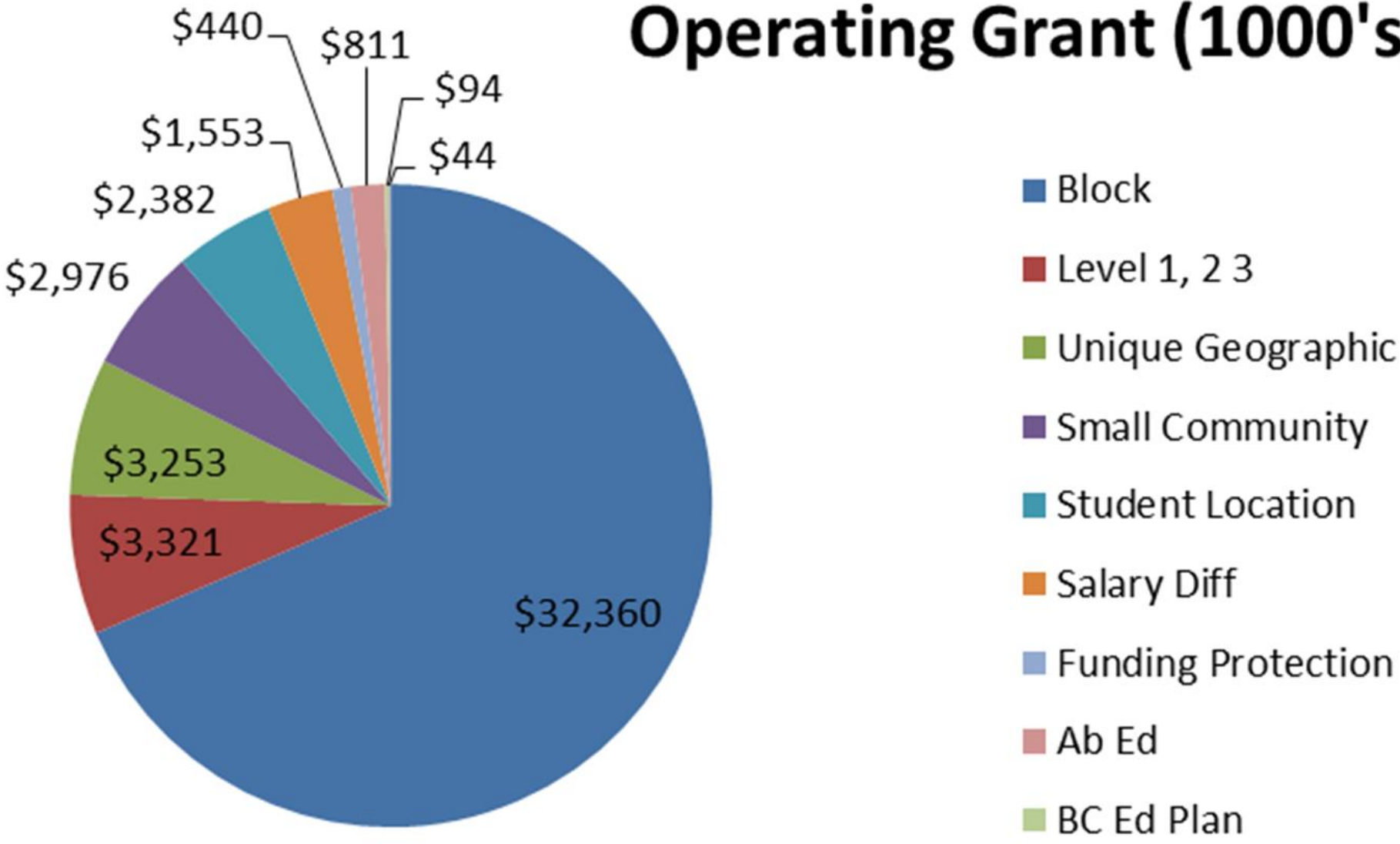
Included in Draft 3	
- 14-15 Carry Forward/Surplus	400,000
- Estimated 1% Administration Savings	(260,130)
- Other Professionals = Superintendent's Contract Renewal	10,000
- Other Professionals Benefits	2,105
- Office - Clerical - Purchasing Coordinator	64,022
- Office - Clerical - Benefits	22,272
- Services & Supplies - Status quo 14-15 less Surplus + Updated School Allocations	(84,113)

Throne Speech

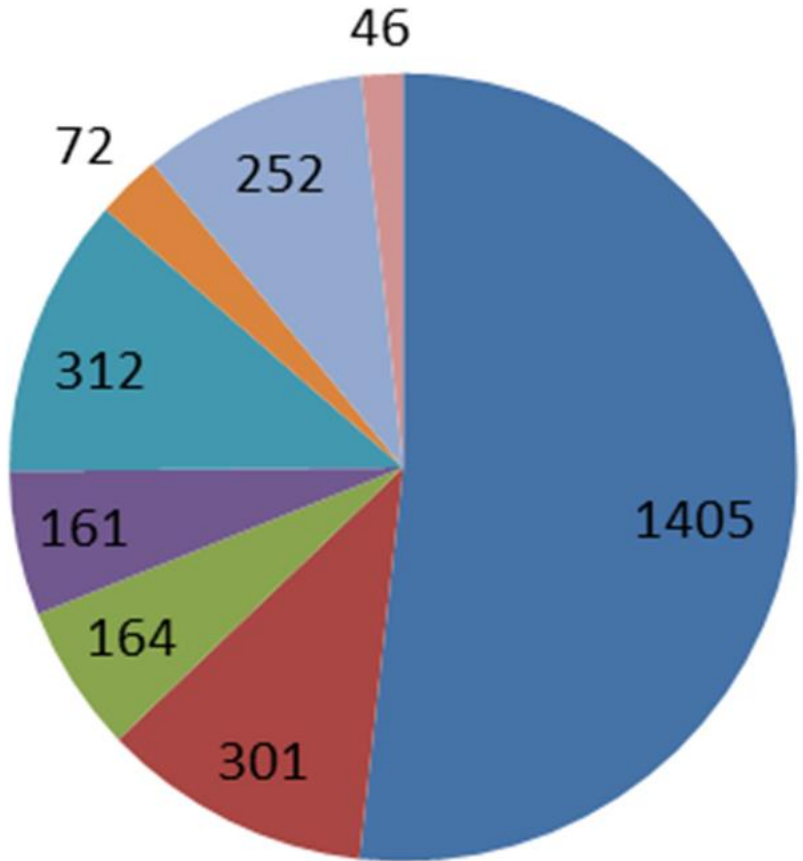
Administrative Savings 1% or \$29m

- ▶ What does that mean?
- ▶ 1% of SD8's administration costs? Function 4/5/7: \$115,920
 - ▶ Function 4 - \$2.154 m = \$21,540
 - ▶ Function 5 - \$7.067 m = \$70,670
 - ▶ Function 7 - \$2.371 m = \$23,710
- ▶ 1% of \$29m by provincial enrolment: \$260,130
- ▶ Total FTE # of students in BC Sept 2014: 521,745
- ▶ Total FTE # of students in SD8 Sept 2014: 4,682 or 0.897%

Operating Grant (1000's)

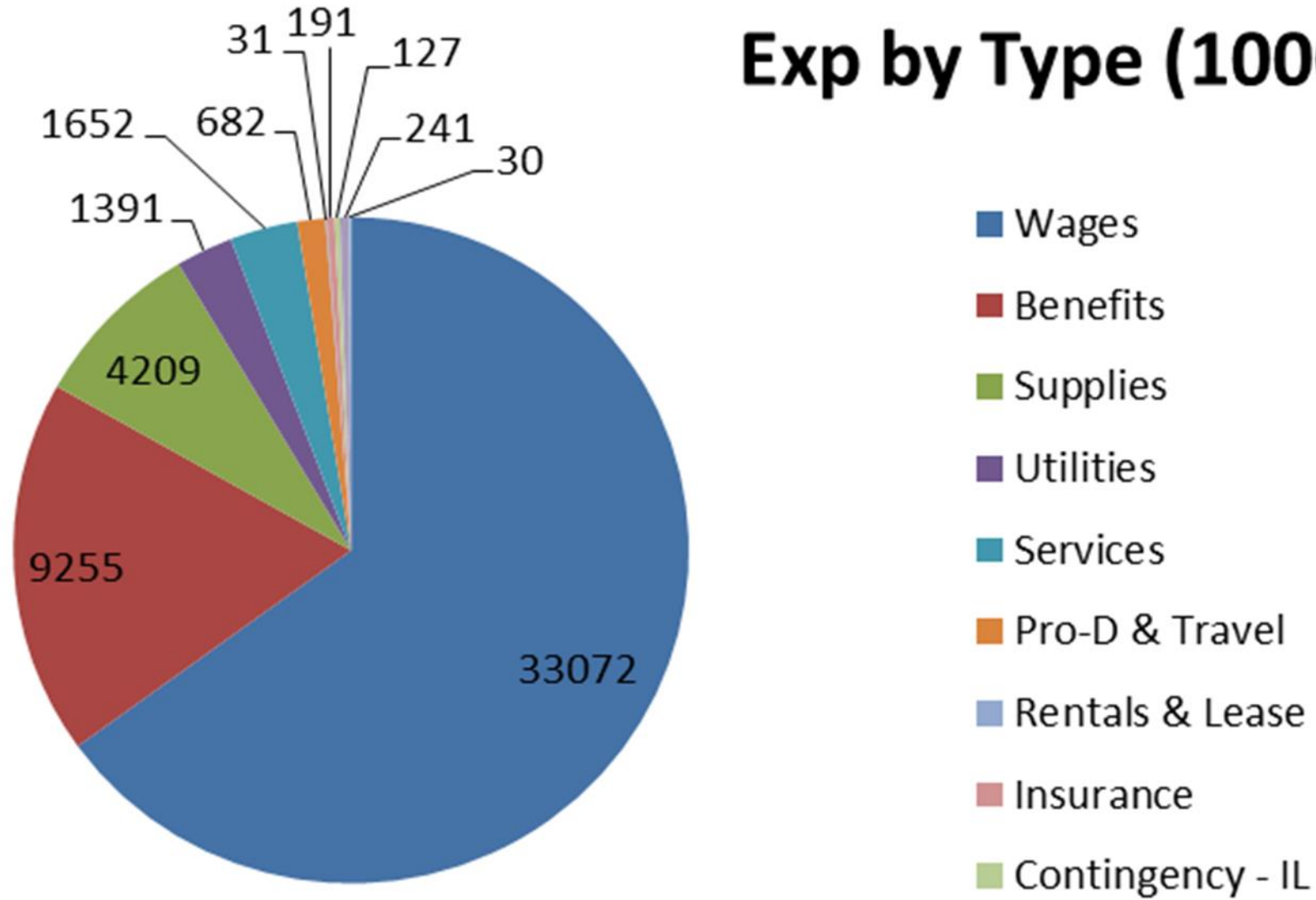


Other Revenue (1000's)

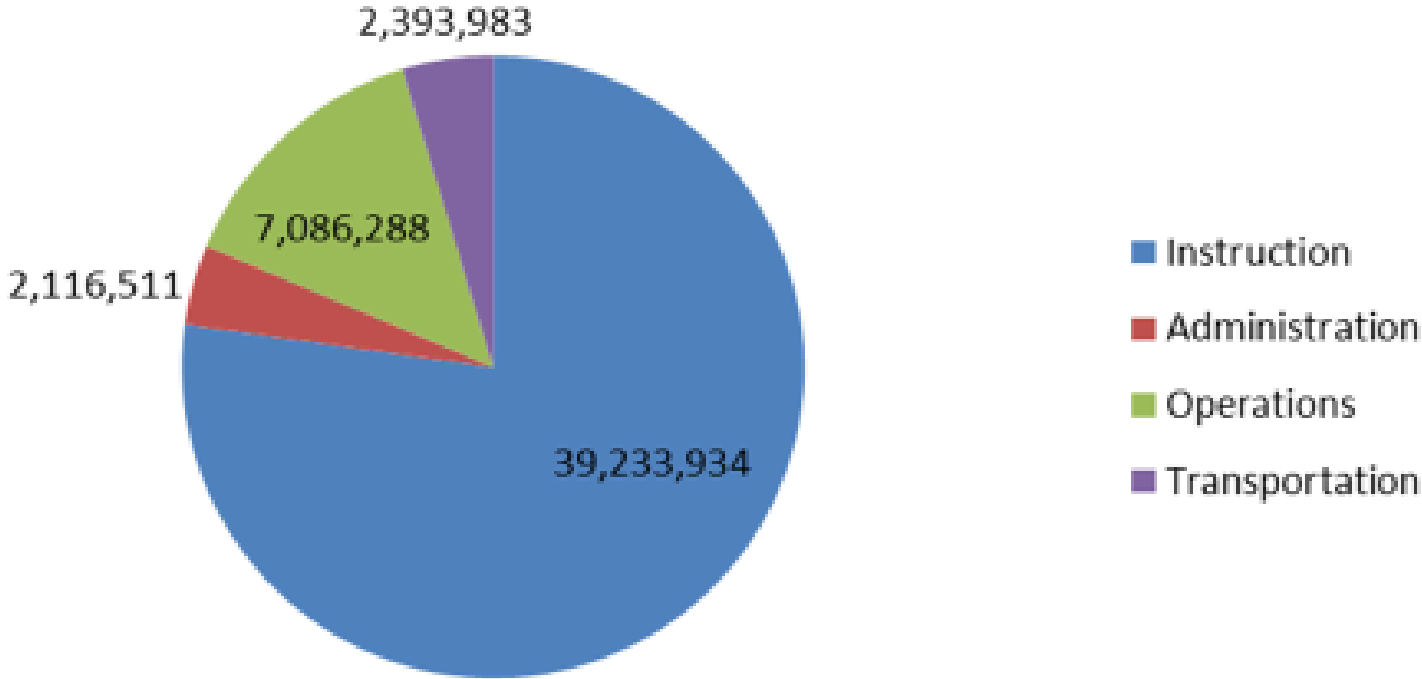


- International
- Pay Equity
- Rentals
- MCFD / IHA
- Other
- Bus Contracts
- LEA
- Interest

Exp by Type (1000's)

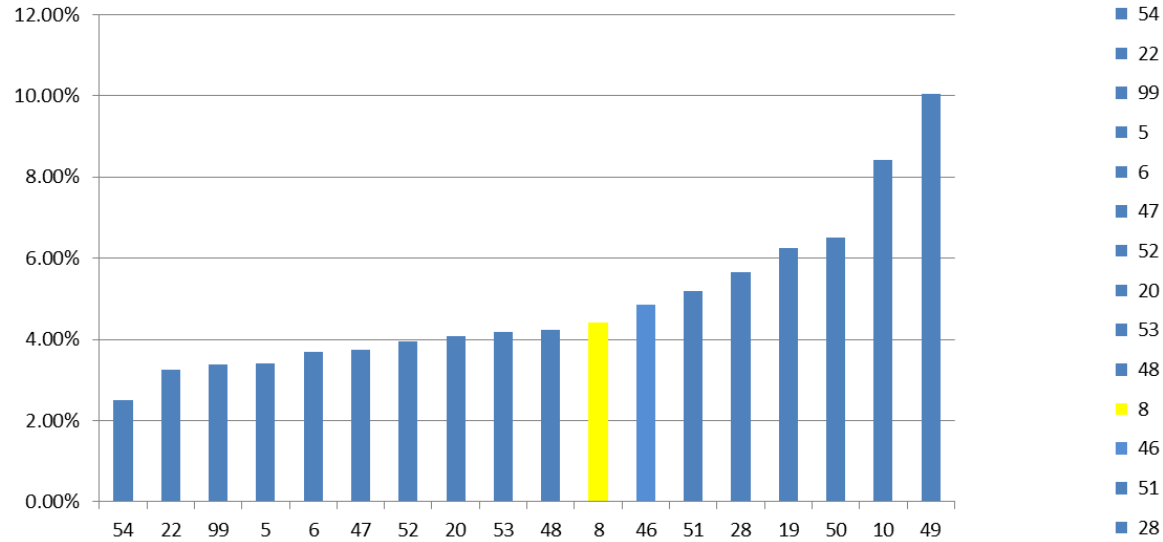


Exp by Function

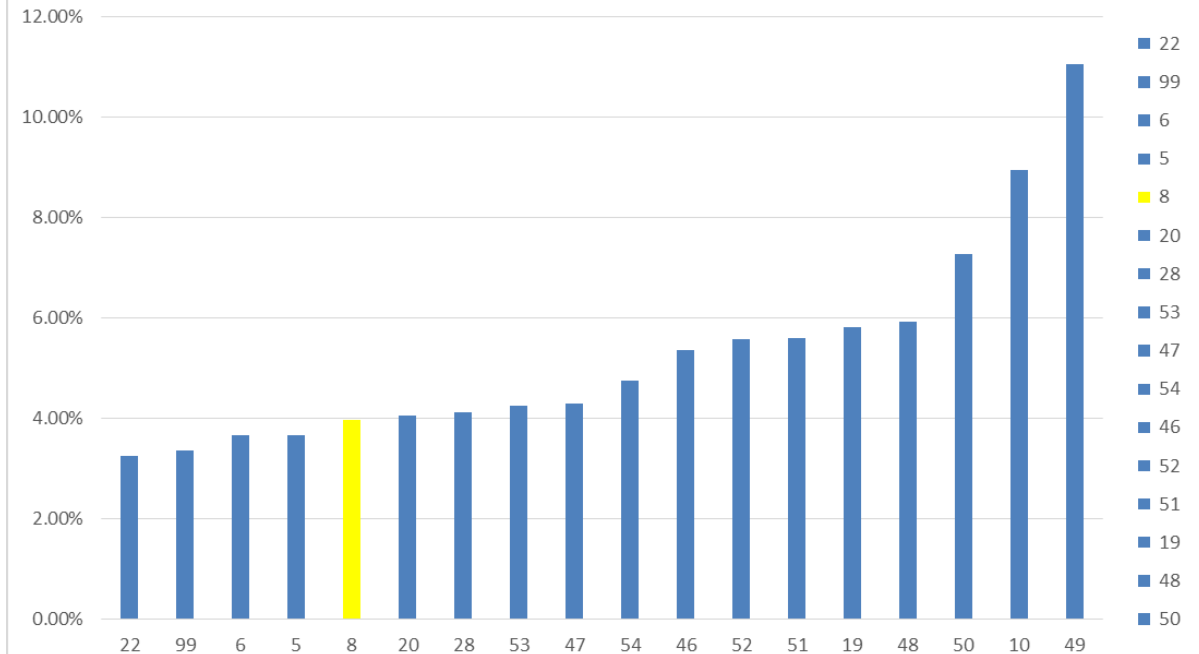


Administration Comparisons-Function 4

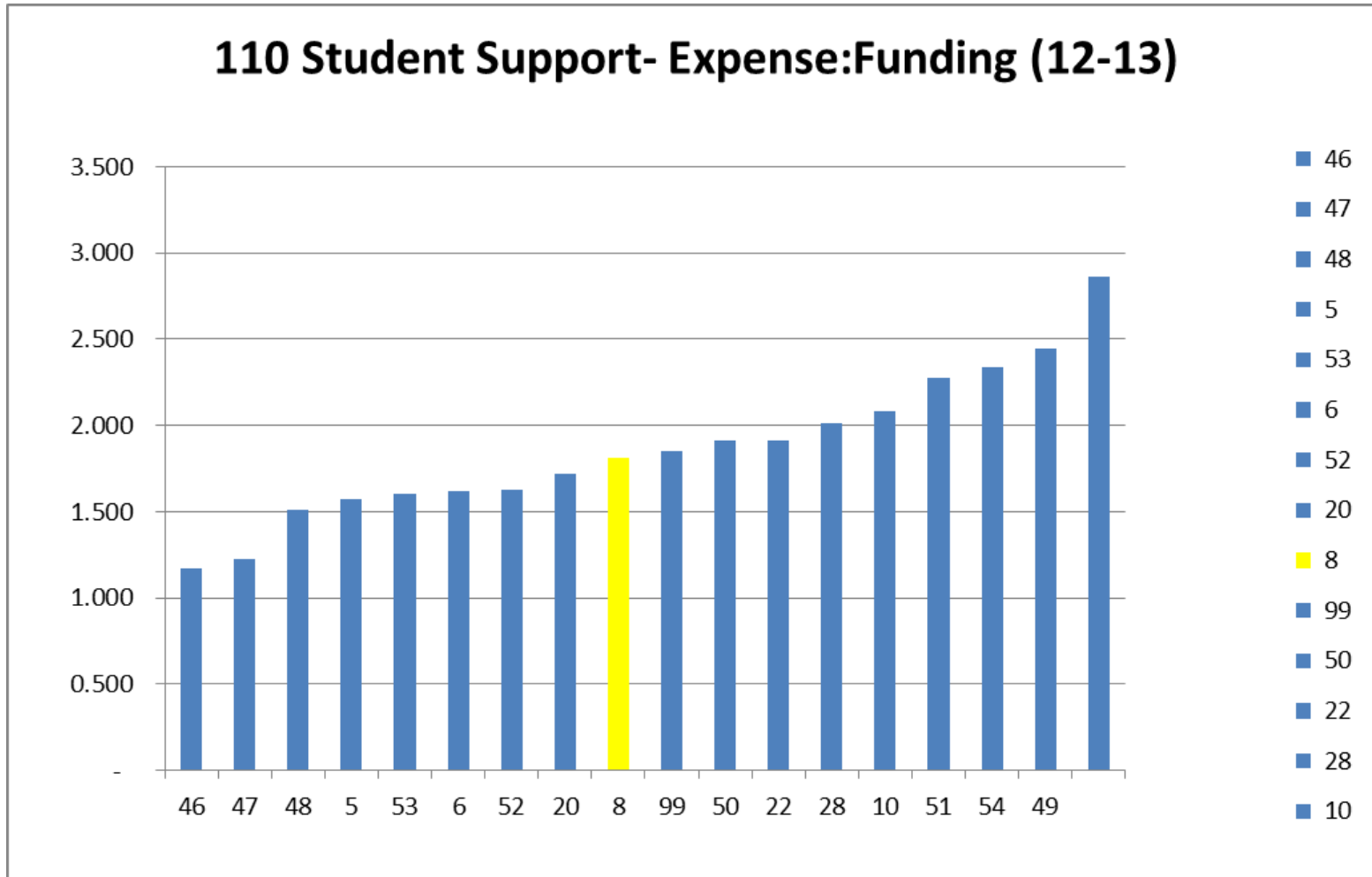
Function 4 - Expense: Total Revenue (13-14)



Function 4 - Expense: Total Revenue (14-15)

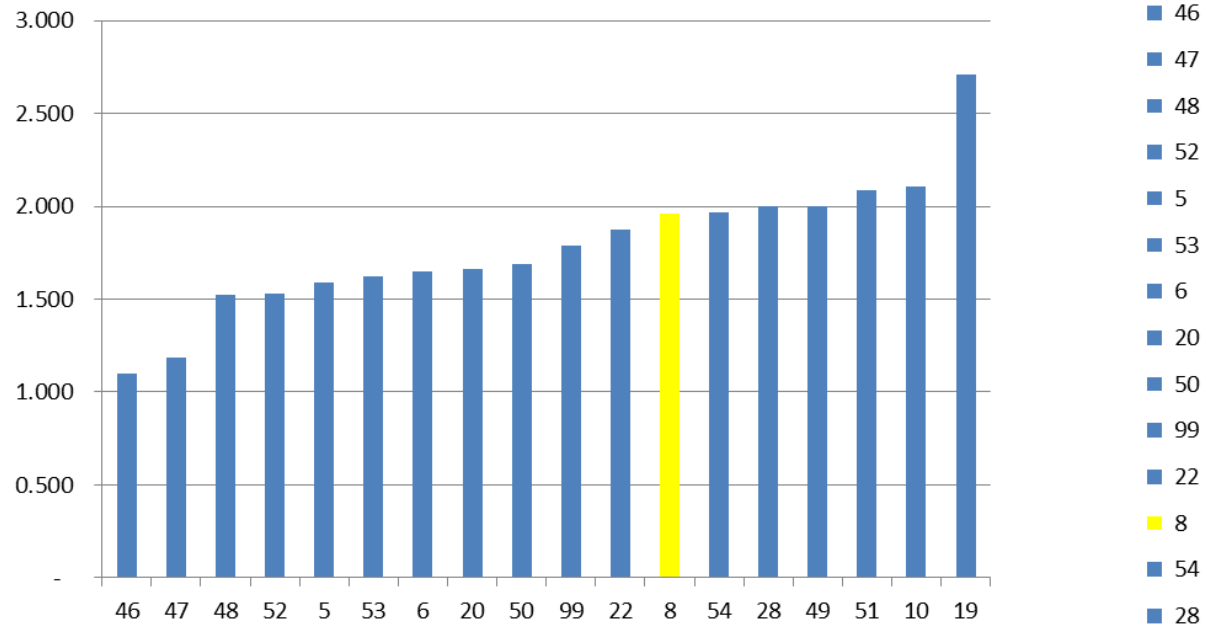


Administration Comparisons - Independent

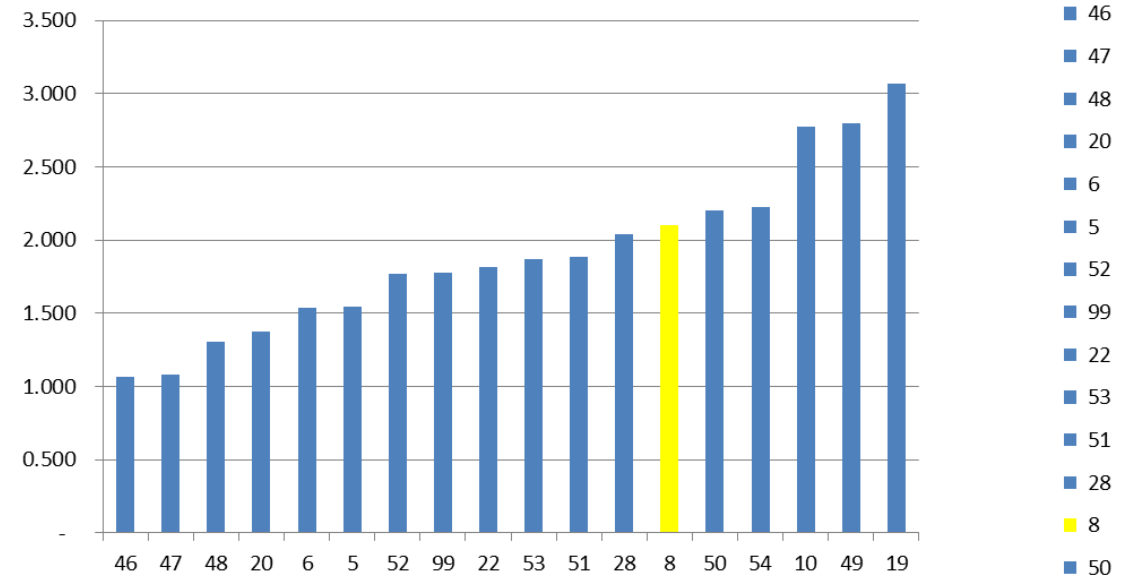


Administration Comparisons

110 Student Support- Expense:Funding (13-14)



110 Student Support- Expense:Funding (14-15)



Administrative Savings - Other?

- ▶ Operations
- ▶ Transportation
- ▶ Innovative Learning
- ▶ Independent
- ▶ Administration: HR, Secretary-Treasurer, Superintendent, Governance

CUPE Savings Plan Continuation

School District No. 8 (Kootenay Lake)								
Progress Report								
Cooperative Gains Mandate Savings Plan for CUPE								
For Fiscals 2013/14 and 2014/15 (Year Ending June 30)								
				2014 - 2015				
				Original Savings Plan (submitted 2013)		Updated Plan		Difference
Category	Item #	Description of Strategy	FTE Impact	Value	FTE Impact	Value		
Benefits	B1	Elimination of Trustee EFAP Premiums	0.00	\$ 360	0.00	\$ 360	\$ -	
Finances	F1	Leasing Vehicles vs. Employee Vehicle Allowances	0.00	\$ 28,375	0.00	\$ -	\$ 28,375	
	F2	Surplus		\$ -				

			2014 - 2015				
			Original Savings Plan (submitted 2013)		Updated Plan		Difference
Category	Item #	Description of Strategy	FTE Impact	Value	FTE Impact	Value	
Operations	O1	Signing onto the TELUS TSMA-Lite Program	0.00	\$ 55,000	0.00	\$ 66,000	\$ (11,000)
	O2	Utilities Budgeting Re-Alignment	0.00	\$ 72,306	0.00	\$ -	\$ 72,306
	O3	Reduced Distributed Learning School Supply Allocations/Budget Re-Alignment	0.00	\$ 45,319	0.00	\$ 114,000	\$ (68,681)
	O4	International Tuition Increase \$500/student	0.00	\$ 32,500	0.00	\$ -	\$ 32,500
	O5	Non-Contractual Pro-D Reduction	0.00	\$ 15,000	0.00	\$ 15,000	\$ -
	O6	Reduction in Tech Replacement Budget as a result of Technology Refreshment Cycle	0.00	\$ 20,000	0.00	\$ 20,000	\$ -
	O7-NEW	Multi-Function Device Fleet Renewal 60 month lease(Photocopiers) (Tab "NEW O7")	0.00	\$ -	0.00	\$ 53,000	\$ (53,000)

Category	Item #	Description of Strategy	2014 - 2015					
			Original Savings Plan (submitted 2013)		Updated Plan		Difference	
			FTE Impact	Value	FTE Impact	Value		
Staffing	S1	Clerical Staffing Reduction	0.84	\$ 32,954	0.84	\$ 32,954	\$ -	
	S2	Reduced Replacement Costs	0.00	\$ 31,584	0.00	\$ 31,584	\$ -	
	S3	Reduction of 1.0 FTE District Principal Replaced with 1.0 FTE Teacher	0.00	\$ 47,287	0.00	\$ 47,287	\$ -	
Shared Services	SS1							
	SS2							
		Total Savings to Support Lifts		\$ 380,685		\$ 380,185	\$ 500	
		Wage and Benefit Cost of F2014 Lift						
		Full Year Impact of F2014 Lift		\$ 379,948		\$ 379,948	\$ -	
		Wage and Benefit Cost of F2015 Lift						
		Savings required to support lifts (excess savings)		\$ (737)		\$ (237)	\$ (500)	

Stakeholder/Public Initiative Submissions

- ▶ Three Submissions:
 - ▶ Tech Ed/Shop Equipment - 603 Points
 - ▶ BKES Assistive Technology - 519 Points
 - ▶ PE Equipment: LVR & MSSS - 497.5 Points
- ▶ All three advanced by the committee to the next steps in the budget
 - ▶ Wish list for Prioritization

Student Symposium

- ▶ Broad Question: What do you need to prepare for next step?
- ▶ Themes:
 1. Courses/Programming - What changes needs to be offered in course choice & content and how will these changes make students more successful/prepared/HAPPY?
 2. Making Connections: How do we find the information we need to make the transition to graduation, post-secondary and life after school and make healthy connections in and out of school?
 3. Staffing - What skills and abilities do instructors (teachers, EA's, counsellors and PVP) require to meet student needs and interests and are there other people that are important to your learning?
 4. Alternate Learning/Grad Requirements - What alternative learning opportunities could be offered to meet graduation requirements?

Student Symposia - NEXT YEAR

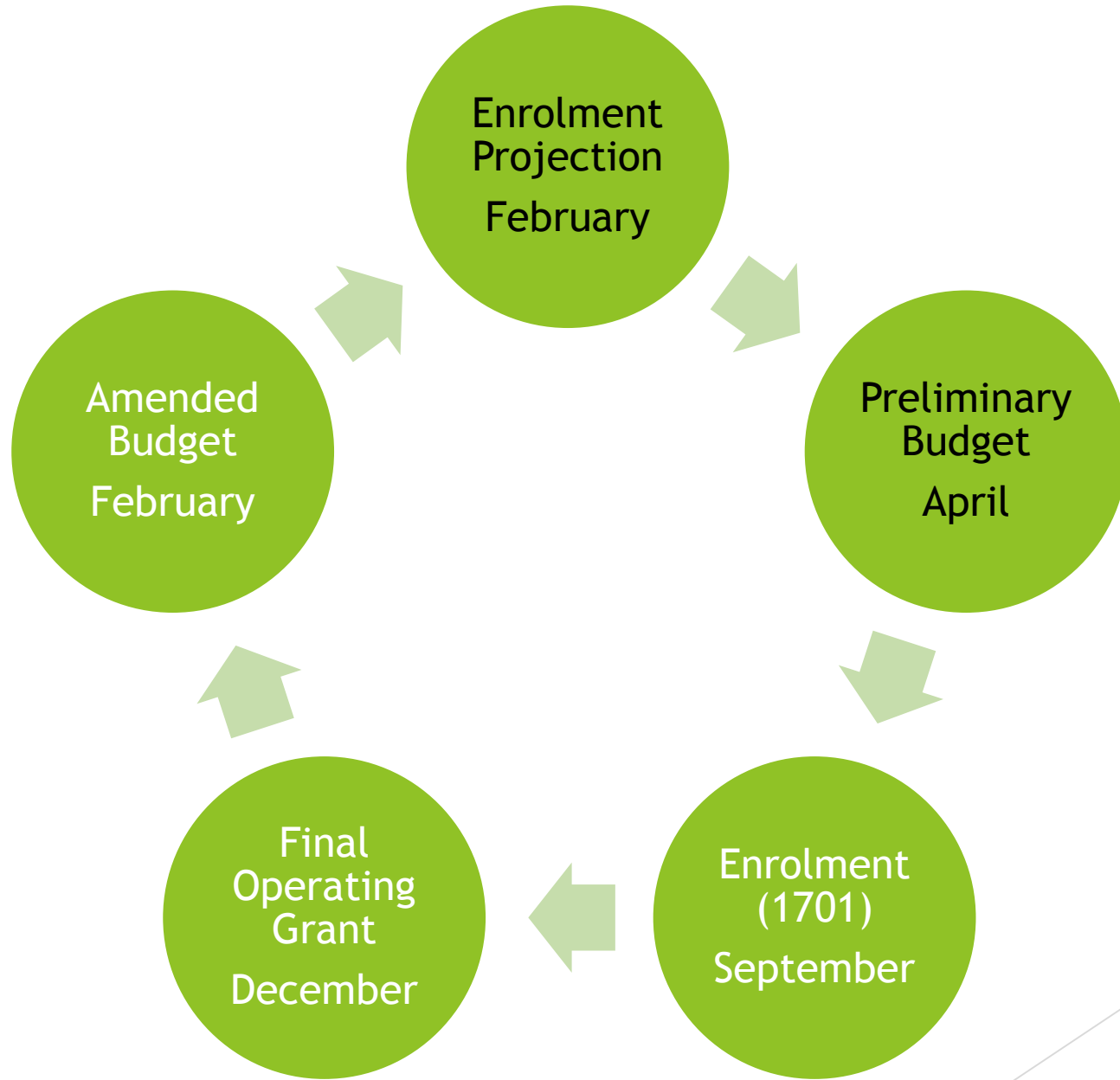
- ▶ Absolutely
- ▶ More adults in the room to give student voice to more involved in the budget process
- ▶ Should we add another stakeholder to the committee: Students?
 - ▶ 2 from 1 school each year
 - ▶ Rotating secondary schools each year (cycle of 5-6 years?)
- ▶ More prepared for the finance questions (presentation)
- ▶ Cross section of students for student that are not as engaged as some - maybe a different format

Assumptions for Draft 4 (next iteration)

- ▶ Survey/prioritization of brainstorming/wish list items
- ▶ Staffing
- ▶ Balancing strategies
- ▶ Superintendent's recommendations
- ▶ Funding announcement March 12
 - ▶ funding protection
 - ▶ 1% administration savings
 - ▶ continuation of CUPE Savings plan
 - ▶ Continued funding of teacher collective agreement (\$754,000)

Unknowns

- ▶ Funding formula changes given funding of CA (will know by spring break)
- ▶ Exempt compensation freeze
- ▶ International
- ▶ Facilities plan
- ▶ DL Audit



Next Steps

04-Mar-15	Salmo	9:00 AM	Board Working Session - Student Voice	TBD	Student Talking Tables or Symposium / Pizza Lunch
05-Mar-15			Principal/Vice-Principal Meeting	Staff/P-VP's	Family of Schools Goals for 15-16
09-Mar-15	Nelson	9:30 AM	Senior Leadership Meeting	Staff	Strategic Plan Alignment/Departmental Budget Development
10-Mar-15	Nelson		Budget Stakeholder Engagement Committee	Committee Members	Draft 3
10-Mar-15	Salmo	5:00 PM	Regular Open Board Meeting	Board	First Reading of Budget By-Law
March 13-March 27			Survey/Thoughtstream		Prioritization Exercise
13-Mar-15			Ministry Funding Announcement		
March 16-27, 2015			Spring Break - NO MEETINGS		
30-Mar-15	Nelson	9:30 AM	Senior Leadership Meeting	Staff	Balancing Strategies/Superintendent Recommendations
01-Apr-15			Budget Request/Instructions from MOE		
07-Apr-15			Board Working Session	Staff/Board	Clarification of Superintendent's Recommendations
07-Apr-15	Nelson		Budget Stakeholder Engagement Committee	Committee Members	Draft 4 / Superintendent's Recommendations
07-Apr-15	Nelson	5:00 PM	Regular Open Board Meeting	Board	Second Reading of Budget By-Law (Debate) - Superintendent's Recommendations
09-Apr-15	Nelson	9:00-1:00 PM	Principal/Vice-Principal Meeting	Staff/P-VP's	Draft 4 / Superintendent's Recommendations
09-Apr-15	Nelson	1:00-4:00 PM	Board Working Session - Talking Tables	Staff/PVP/Board	Impact of Superintendent's Recommendations
20-Apr-15	Nelson	5:00 PM	Board Working Session - Stakeholder Talking Tables	TBD	Facilitated Discussion: Achievement & Superintendent's Recommendations

Brainstorming

Senior Leadership
No bus fees
Exempt and PVP Wage Increase
1.0 DVP Innovative
1.0 Director of Technology
1.0 Tradesman
Communications Budget
Professional Improvement Leave(s)
VP in every School

Brainstorming - HR

Human Resources Budgets		
2015-2016 Proposals		
PVP pro-d?????		
KLTF Professional Development		65,000
CUPE Professional Development		9,750
EFAP		55,000
Staff Recognition	doubled	20,000
Excluded Recruitment	increase	7,000
Take out MAF and ATE costs		
Employee Recruitment	increase	13,000
Separate MAF/ATE into its own line item		
SFE (Employee replacement system)	new	7,000
SDS rollover year to year session with SDS	new	500
Criminal Record Checks	doubled	6,000
Advertising	reduced	2,000
Labour Management (CUPE)	reduced	4,000
Grievance Settlements	same	12,000
Wellness program - teachers	same	5,000
Duty to Accommodate	same	10,000
Pro-d EA Human Resources	same	1,500
Pro-d Manager Human Resources	same	2,500
Pro-d Director Human Resources	same	5,000
HR - professional resources/subscriptions	same	1,500
HR- Travel	increase	10,000
Leadership Development - Labour Relations	new	6,000
	TOTAL	242,750

Brainstorming - Independent

VTRA \$15,000

Mandt \$15,000

ASIST \$15,000

Capacity Building \$25,000

Brainstorming - Trustees

- ▶ technology staffing
- ▶ continue to support and look to expand the size and scope of the wildflower school
- ▶ provide more programming and opportunities that allow students to be outside. Take advantage of the abundance of nature based learning opportunities in our region
- ▶ arts education should be a larger priority

Brainstorming - DPAC

- Decrease class sizes - increase number of teachers in all grades
- More specialist teachers - especially music (mentioned by several parents), try to share specialist teachers within a family of schools, or neighbouring families of schools
- Increase access to student service specialists and assessments, e.g., speech language pathologists, psychologist, OT - many families must wait several months for assessments and therapies or pay for the service privately, if they can afford it (and there can be significant wait times privately as well). "Time is of the essence for kids with challenges. Let's spend more money to help our students address and overcome the hurdles in their lives (mental, emotional, learning disabilities.)"
- Increased access to district resources - share equipment between schools, e.g., shop equipment, winter sports, desks, tables, chairs; fund staff to create inventory, schedule and facilitate sharing. Should result in savings as all schools won't need identical sets of equipment.
- Increased classroom and school resources:
Ensure our classrooms and schools are equipped with the necessary resources first and foremost when it comes to the budget. PACs should not be asked to fund basic resources such as tables and chairs.
- maintenance - increase staff, even if only short term, to attend to the massive backlog of maintenance and repair tasks
- increase support staff - increase playground and lunch time supervision, after school until buses leave as well as increased educational time to assist teachers and students that require additional support in the classroom.
- increase extra-curricular opportunities - although most of these activities depend on teacher volunteers, the district can facilitate

Brainstorming - KLTF

Facilities:

- upgrades to older buildings (eg: Trafalgar) such as plumbing (some sites have challenges)
- electrical upgrades in older schools (many classes don't have adequate number of electrical outlets to support the large scale use of computers & other forms of technology)

Student Support:

- consideration of gray area students, more LA support for classes with more than five or six gray area students.
 - smaller classes for grade 6 as they are all coming from feeder schools and no one knows what is coming until the group arrives. (A small problem at one school can mushroom rather quickly when the same small problem comes from four schools at the same time.)
- learning assistance training in the French Immersion program (some training in our department for assessing learning disabilities; students are learning in French and not developing English sight words)
- making sure schools have adequate learning support time.
- need for counselling in every school to address the higher incidence of high anxiety in students
- EA time for designated special needs kids who need it, qualify for it & are entitled to it.

Brainstorming - KLTF Con't

Class Size & Composition:

- A more reasonable approach to multi-grade classrooms and composition
- smaller class sizes and more support for students with learning challenges.
- set realistic caps on the number of students with IEPs in any given class; and respect the caps
- In the primary classes, especially kindergarten we find out as the year progresses what the challenges are with some of the learners, and with a class of 22 kindies, it's near to impossible to support ANY of the learners with that class size and with the number of learning challenges that inevitably pop up.
- In the intermediate classes which almost always are multi-age (split) now, there is always a need for support/team teaching for the diverse levels of ability in that age/learning group.
- reduce the number of split classes
- reduce class sizes; hire more teachers

Brainstorming - KLTF Con't

Technology:

- More technology resources, training, and overall functioning
- More on site tech support, perhaps a staff tech support position
- update technology - laptops and wireless should be fast and should work every day. The ones in the schools are sad and so slow...waste of time.

Staffing:

- More teacher time instead of EA support
- no more cuts to teaching staff
- A collaborative block put into everyone's schedule
- Actively recruit new teachers by interviewing candidates at all teacher colleges
- EA time that is more flexible to meet student needs and allows for attendance/collaboration w classroom teacher, LST, and specialists (example: after school meetings).

Brainstorming- Administrative Savings

- ▶ Services & Supplies - Draft 3 - are there items that we do not need?
- ▶ Staffing - are there positions that we do not need or can re-align to create room for new positions we see as a priority? Can new positions be shared between districts?
- ▶ Are there organizational hierarchy structures we can flatten?
- ▶ Monthly financial report to the board - are there items that we do not need?
- ▶ Are there line items we consistently budget year over year, but do not spend?
- ▶ Purchasing coordinator
- ▶ Shared services: litigation pool, provincial purchasing

2015-2016 Budget

Effective Resource Allocation:

Organizational goal alignment

Student/learning centred

Sustainable

Consultative

Diverse input

Legislative and Ministry mandates

Questions?

