

2017-2018 TALKING TABLES

February 28, 2017 5:00 pm
Prestige Lakeside Resort



SCHOOL DISTRICT NO. 8 (KOOTENAY LAKE)

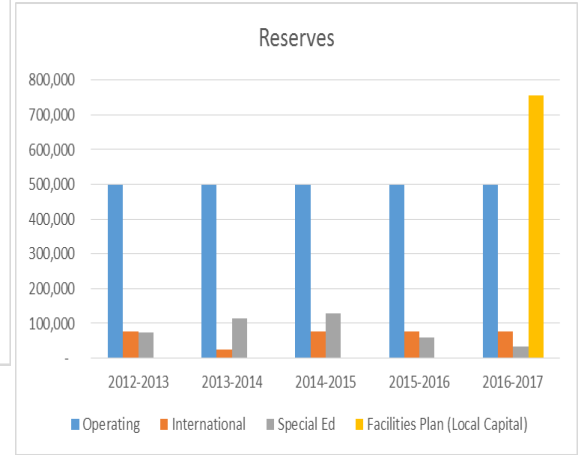
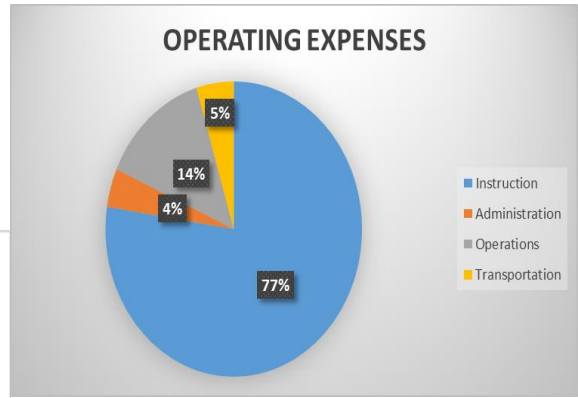
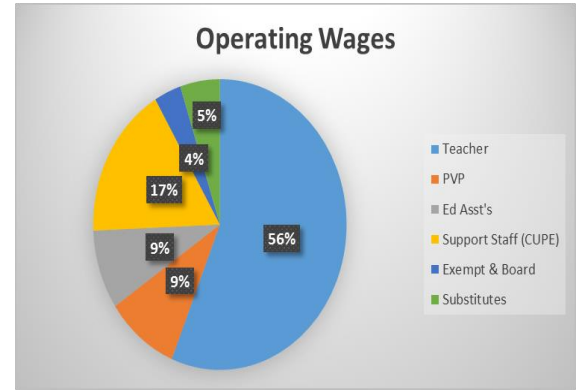
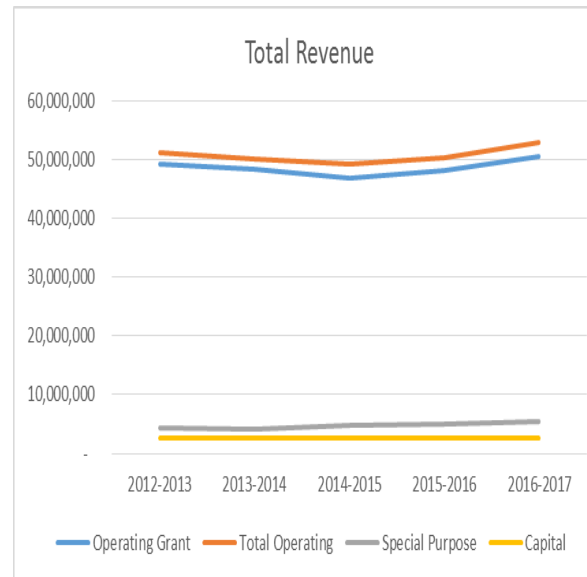
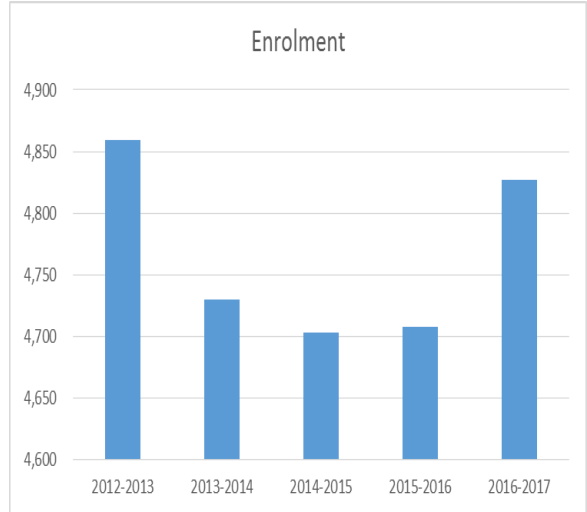
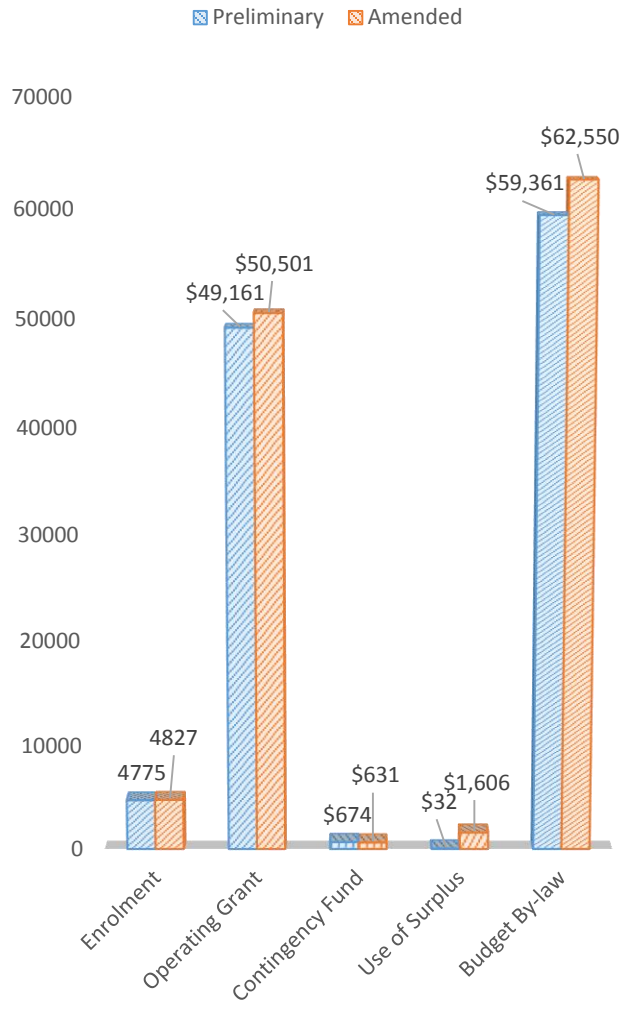
BUDGET STAKEHOLDER ENGAGEMENT COMMITTEE

WHAT IS TALKING TABLES?

- **EVENT IN THE BSEC PROCESS**
- **EVOLVED FROM A BOARD/SENIOR LEADERSHIP/PVP EVENT**
- **TO INCLUDE STAKEHOLDERS KLTF/CUPE/DPAC**
- **SOCIAL**
- **OPPORTUNITY FOR TRUSTEES TO HEAR DIRECTLY FROM THE FIELD**
- **OPPORTUNITY FOR INDIVIDUALS TO DELIVER MESSAGING TO TRUSTEES**
- **TALK ABOUT LEARNING BEFORE MONEY TO ALIGN RESOURCES**

2016-2017 AMENDED BUDGET SUMMARY

CHANGE FROM PRELIM TO AMENDED (1000'S)



PELP Coherence Framework





ACADEMIC SUCCESS



CITIZENSHIP



RESILIENCY



IMAGINATION AND CREATIVITY

BUDGET 2017-2018

- [WWW.SD8.BC.CA / NEWS & HIGHLIGHTS / BUDGET 2017-2018](http://www.sd8.bc.ca/news&highlights/budget2017-2018)
- [HTTP://WWW.SD8.BC.CA/?PAGE_ID=5291](http://www.sd8.bc.ca/?page_id=5291)
- **PROCESS IS DEVELOPED BY BSEC EACH FALL FOR FOLLOWING YEAR**
- **FEEDBACK/DEBRIEF AT THE END OF EACH PROCESS**
- **MAIN PREMISE: ALIGN FINANCIAL AND HUMAN RESOURCES WITH STUDENT LEARNING NEEDS**

NEW TO 2017-2018

- **VALUES SETTING AT OUTSET TO ENSURE ALIGNMENT**
- **ZERO-BASED**

STUDENTS



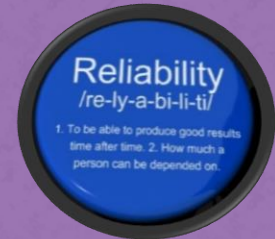
Health (Mental & Physical)



Relationships (Friends and Family)



Happiness & Fun



Reliability



STUDENTS



Honesty



**Respect
Equality**



Hard Work



Nature



CUPE - STUDENTS



Safety



Supported



**Respected &
Respectful**



Sense of Well-Being



CUPE - STAFF



Right Fit



Supported



**Adequately
Resourced**



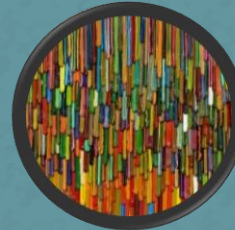
CUPE – WORK & LEARNING ENVIRONMENTS



**Equitable and
Non-Judgemental**



**Clean, Safe &
Comfortable**



**Individualized
and With Variety**



Sense of Place



DPAC – DIRECT LEARNING SUPPORT



Small Class Sizes



Outdoor Education



Improved Self-Esteem & Self-Confidence



Passion & Intrinsic Motivation



DPAC – SUPPORTIVE LEARNING ENVIRONMENTS



DPAC – EXTERNAL FACTORS



**Link to Post-Secondary
Institutions**



**Real World Job Training
Opportunities**



Parent Education



**Advocacy for:
Well-Funded &
Adequately Resourced
Schools**



KLTF



**Improved Student
Teacher Ratios
(esp Non-
Enrolling)**



**Classroom
Resources**



**Emotional Health
for Students**



**Appropriate Staff
Coverage**



**Support for
Special Needs**



**Wide
Opportunities
Beyond the Core**



PRINCIPALS/VICE-PRINCIPALS



**Safe & Healthy
Learning
Environments**



**Flexible/
Individualized
Learning
Environments**



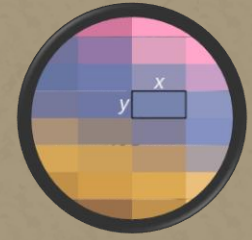
**Students' Sense
of Physical &
Mental Well-
Being**



**Pro-D
Opportunities
to Stay Current**



**Sustainable,
Well-Resourced
Teachers &
Schools**



**Student
Teacher Ratios**



STAFF



Future Orientation



**Throughline to
Students at Every
Level**



**Appropriately
Resourced**



**Capacity Building
& Development for
All**



STAFF



High Quality Teaching & Learning; Meaningful Assessments



Responsive Learning Environments



District Responsibilities Within a Provincial System



TRUSTEES



**Family Staff
Partnership**



**Student Prepared
for Changing
World**



**Valuing Public
Education**



Social Justice



TRUSTEES



**Healthy Learning
Environments**



**Nature &
Environment**



Educated Citizens



Inclusiveness



VALUES INTERSECTION?

Value	Trustees	KLPVPA	CUPE	KLTF	DPAC	Staff	Students
Family-Staff Relationship	X				X		
Student Prepared for Changing World	X					X	
Valuing Public Education	X						
Social Justice	X						
Healthy Learning Environments	X	X					
Nature and Environment	X				X		X
Educated Citizens	X						
Inclusiveness	X						
Students: Safety			X				
Students: Supported			X				
Students: Respected and Respectful			X				X
Students: Sense of Well-Being (Physical and Mental)		X	X	X	X		X
Staff: Right Fit			X				
Staff: Supported			X				
Staff: Adequately Resourced		X	X	X	X	X	
Work & Learn Enviro's: Equitable and Non-Judgemental			X				
Work & Learn Enviro's: Clean, Safe and Comfortable		X	X				
Work & Learn Enviro's: Individualized and With Variety		X	X				
Work & Learn Enviro's: Sense of Place			X				
Flexible Learning Environments		X			X		
Pro-D Opportunities to Stay Current		X				X	
Student Teacher Ratios		X		X	X		
Appropriate Staff Coverage				X			
Support for Special Needs				X			
Wide Opportunities Beyond the Core				X	X		
Passion & Intrinsic Motivation					X		
Improved Self-Esteem & Self-Confidence					X		
Accessible (physically/bussing/catchment/program)					X		
Relevant Resources for Learning Environment					X		
Responsive and Linked to Community					X		
Link to Post-Secondary Institutions					X		
Real World Job Training Opportunities					X		
Parent Education	X				X		
Advocacy for Well-Funded & Adequately Resources Schools					X		
Future Orientation	X					X	
Throughline to Students at Every Level						X	
Appropriately Resourced		X	X	X	X	X	
Capacity Building & Development For All		X				X	
High Quality Teaching & Learning; Meaningful Assessments						X	
Responsive Learning Environments					X	X	
District Responsibilities Within a Provincial System						X	
Relationships - Family & Friends							X
Happiness & Fun							X
Reliability							X
Honesty							X
Equality							X
Hard Work							X

By establishing our values at the outset, it is intended that we "check-in" throughout the process to ensure we're on track and better meeting the needs of committee members. By articulating what each of us needs in order to feel successful in the budget process, we'll understand our team dynamic more and be more receptive to understanding each person's needs, style and mandate.

ZERO-BASED BUDGETS



- **STATUS QUO**
 - **EST. REVENUE** **\$60 MILLION**
 - **- EST. EXPENSES** **\$61 MILLION**
 - **= SHORTFALL** **\$1 MILLION**

 - **WHERE SHOULD WE CUT \$1M?**
- **ZERO BASED**
 - **EST. REVENUE** **\$51.3 MILLION**
 - **- “GO TO JAIL”** **\$29.4 MILLION**
 - **= “SPEND”** **\$21.9 MILLION**

 - **HOW DO I SPEND TO ALIGN WITH VALUES AND LEARNING?**

STATUS QUO BUDGET PROCESS

Status quo

- Determine enrollment decline or growth

- Receive same or reduced operating grant

- Cut or increase staffing and supplies to balance budget

Pros

- Conservative

- People are used to it

Cons

- May prohibit new initiatives unless mandated

- Complacency

ZERO BASED BUDGET DEVELOPMENT

Zero based budgeting is a technique of planning and decision-making which reverses the working process of traditional budgeting

every department function is reviewed comprehensively

all expenditures must be approved, rather than only increases and cuts

requires the budget request be justified in complete detail by each division manager starting from the zero-base

INSTEAD OF ...

What do I need to cut?

ASK YOURSELF ...

What can I do?

ZERO-BASED BUDGETS

GO TO JAIL vs DISCRETIONARY

Hard line approach to looking at expenditures...

Go to Jail:

Legislated by School Act, Employment Standards, Collective Agreements

Examples:

Superintendent

Trustees

Principals

Educational Program

Financial Audit

Heat, light

Teacher Pro-D

Leases: office space, photocopiers

Insurance

Payroll

GO TO JAIL vs DISCRETIONARY

Discretionary:

Not legislated; driven by board policy, staff recommendation, public pressure, historical service levels

Examples:

Software licensing and support fees

Legal and Negotiations/Arbitration

Advertising

Telephones and Postage

Custodial Service Levels

Library books and staffing

Senior staff

Vice Principals

Transportation (bussing)

Technology

Supplies and Equipment

GO TO JAIL vs DISCRETIONARY

Important to know your “go to jail”

Opens your eyes to traditional services levels that may not be producing the results they once did

Allows you to free up money for
new initiatives
exploration of options
capture passion of staff to initiate
improved results

The more discretionary dollars you have the more flexibility you have to adapt to landscape changes, plan and improve success of students

A COUPLE OF EXAMPLES...

INDEPENDENT LEARNING

Services & Supplies:

2016-2017 Status Quo	252,055
“Go to Jail” Items	0
Available to “Spend” (blue columns)	252,055

Staffing:

2016-2017 Status Quo	6,987,165
“Go to Jail” Items	3,907,500
Available to “Spend”	3,079,665

Total “Spend” for 2017-2018	3,331,720
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INDEPENDENT LEARNING: ZERO-BASED BUDGET
January 16, 2017 for BSEC 2017-2018

		2016-2017				2017-2018			"SPEND" AMOUNT 2017-2018
SERVICES & SUPPLIES		16-17 FULL YEAR BUDGET	LESS: 15-16 SURPLUS CARRY FWDS	STATUS QUO 16- 17 BUDGET	ZERO-BASED 17-18 BUDGET	Justification: Legislation	Justification: "Secondary Regulation"		
0000-1-10-31015	Contract Services	95,000		95,000	-			95,000	
0000-1-10-34100	Travel Special Ed	37,400		37,400	-			37,400	
0000-1-10-34418	Capacity Building Project	32,000	32,000	-	-			-	
0000-1-10-35304	Pro D - Director Of S.S.	9,429	4,429	5,000	-			5,000	
0000-1-10-35401	Support Staff Training	3,000		3,000	-			3,000	
0000-1-10-36010	Rental/Property Lease	20,203		20,203	-			20,203	
0000-1-10-37100	Membership Fees	4,000		4,000	-			4,000	
0000-1-10-43100	Telephone	6,000		6,000	-			6,000	
0000-1-10-51000	Supplies - General	10,300		10,300	-			10,300	
0000-1-10-51310	Contingency	32,185		32,185	-			32,185	
0000-1-10-51450	Integration Support Supplies	3,000		3,000	-			3,000	
0000-1-10-53300	Physiotherapy Supplies	1,500		1,500	-			1,500	
0000-1-10-53301	Speech/Language Supplies	2,400		2,400	-			2,400	
0000-1-10-53302	Sp/Ed High Cost	5,000		5,000	-			5,000	
0000-1-10-53375	Sp/Ed Visual/Impaired	500		500	-			500	
0000-1-10-53376	Sp/Ed Hearing Impaired	500		500	-			500	
0000-1-10-53390	Assessment Services/Materials	5,000		5,000	-			5,000	
0000-1-10-58000	Equipment	4,000		4,000	-			4,000	
0000-1-30-51100	EsI Supplies	17,067		17,067	-			17,067	
TOTAL		288,484	- 36,429	252,055	-			252,055	
STAFFING		16-17 FULL YEAR BUDGET	FTE		ZERO-BASED 17-18 BUDGET	Justification: Legislation	Justification: "Secondary Regulation"	"SPEND" AMOUNT 2017-2018	
<u>Special Education Services (110)</u>									
	Director of Independent Learning	162,608	1.0		-			-	
	Student Services Coordinator	87,190	1.0		-			-	
	PVP Salaries	177,610	1.9		-			-	
	Teacher Salaries	2,513,491	25.6		-			-	
	Paraprofessional-Spec/Serv	3,769,563	64.4		-			-	
	TOCS	23,042	-		-			-	
	Relief - Spec/Serv	223,020	0.1		-			-	
		6,956,525	94.0		3,907,500 ***			3,049,025	
<u>English Language Learners (130)</u>									
	PVP Salaries	2,198	-		-			2,198.41	
	Teacher Salaries	21,004	0.2		-			21,003.50	
	Paraprofessional-Spec/Serv	7,439	0.1		-			7,438.88	
		30,641	0.3		0			30,641	
TOTAL		6,987,165	94.4	6,987,165	3,907,500			3,079,665	
TOTAL				7,239,220	3,907,500			3,331,720	

*** - Level 1/2/3 Funding - 1617 Operating Grant Re-Calc

TRANSPORTATION

Services & Supplies:

2016-2017 Status Quo	670,200
“Go to Jail” Items	120,980
Available to “Spend” (blue columns)	549,220

Staffing:

2016-2017 Status Quo	1,791,759
“Go to Jail” Items	298,623
Available to “Spend”	1,493,136

Total “Spend” for 2017-2018	2,042,356
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DIRECTOR OF OPERATIONS: ZERO-BASED BUDGET - TRANSPORTATION

January 16, 2017 for BSEC 2017-2018

SERVICES & SUPPLIES	2016-2017			2017-2018			"SPEND" AMOUNT 2017-2018
	16-17 FULL YEAR BUDGET	LESS: 15-16 SURPLUS CARRY FWDS	STATUS QUO 16- 17 BUDGET	ZERO-BASED 17-18 BUDGET	Justification: Legislation	Justification: "Secondary Regulation"	
<u>Transportation Admin:</u>							
0000-7-41-31020 Driver Training	20,000		20,000	-			20,000
0000-7-41-43100 Telephone	3,200		3,200	-			3,200
0000-7-41-44500 Advertising	2,000		2,000	-			2,000
<u>Transportation:</u>							
Student Transportation Fund	0		-	41,780			41,780
0000-7-70-33200 Transportation Assistance	30,000		30,000	-			30,000
0000-7-70-39100 Veh/Bus Insurance	42,000		42,000	6,000			36,000
0000-7-70-39500 Bus Radio Licences	5,000		5,000	-			5,000
0000-7-70-39510 Bus Radio Repairs	6,000		6,000	-			6,000
0000-7-70-42700 Hearing/Medical Tests	8,000		8,000	-			8,000
0000-7-70-54300 Bus Repairs/Mtce	125,000		125,000	16,666.67			108,333
0000-7-70-54700 Uniforms/Cleaning	5,000		5,000	-			5,000
0000-7-70-54900 Bus Fuel	424,000		424,000	56,533.33			367,467
TOTAL	670,200	-	670,200	120,980			549,220
STAFFING	2016-2017			2017-2018			"SPEND" AMOUNT 2017-2018
	16-17 FULL YEAR BUDGET	FTE		ZERO-BASED 17-18 BUDGET	Justification: Legislation	Justification: "Secondary Regulation"	
Bus Mechanics	268,006	3.0		89,335			178,671
Bus Drivers	1,115,208	18.0		209,287			905,921
Tranportation Coordinator	262,575	3.0		-			262,575
Relief - Bus Drivers	145,969	2.4		-			145,969
TOTAL	1,791,759	26.4	1,791,759	298,623			1,493,136
TOTAL			2,461,959	419,603			2,042,356

DISTRICT OVERALL STAFFING

Regular Staffing:	FTE	Cost
2016-2017 Status Quo	525.606	\$42,660,235
“Go to Jail” Items	264.252	\$25,266,022
Available to “Spend” (blue columns)		\$17,394,213
Replacement Staffing:		
2016-2017 Status Quo		\$ 1,746,943
“Go to Jail” Items		\$ 974,961
Available to “Spend”		\$ 771,982
Total “Spend” for 2017-2018		\$18,166,195

Supplemental Information page 11

Zero-Based Budget - District Staffing
Operating Fund

STAFFING	2016-2017 Status Quo		2017-2018 Zero-Based		Rationale
	FTE	COST	FTE	COST	
Regular Staffing					
Teachers	250.012	24,538,171	199.580	19,588,339	Assuming Enrolment is static: Core 197.08 + 2.5 Surplus for Sept 16 pressures = 250
Principals / Vice Principals	32.000	3,848,597	22.000	2,890,262	1 Principal for each school except Jewett (to share JVH's P) and 0 VP's
Exempt - Superintendent	10.800	1,395,584	1.000	189,946	Superintendent is the only exempt staff member required
<u>Education Assistants</u>					
Early Learning	4.307	208,520	-	-	
Noon Hour	5.854	282,323	-	-	
Special Needs (110)	77.749	3,802,946	-	-	No legislation but usually staffed from Level 1/2/3 funding
English Language Learner (ESL)	0.119	6,038	-	-	No legislation but usually staffed from Fall student data collection
Aboriginal Education	7.631	385,433	-	-	No legislation but usually staffed from Fall student data collection
<u>Clerical</u>					
Student Services (Special Ed) Coordinator	1.000	86,920	-	-	
School Secretaries	25.695	1,312,565	-	-	
Administraton Secretaries (Operations/Transportation)	1.000	66,028	-	-	
Library Clerks	4.528	224,478	-	-	
Accounting Staff	5.000	350,127	1.000	76,055	If teachers, superintendent and PVP are required, must provide payroll services
Dispatch Staff	1.000	56,143	-	-	
Courier	1.024	57,374	-	-	
Operations Crew	15.160	1,236,559	4.000	362,084	If buildings are open to provide program 2 electricians and 2 plumbing/heating tradespersons
Information Technology	7.000	555,262	-	-	
Custodians	37.063	2,216,537	27.797	1,662,403	Current staffing levels provide for "moderate dinginess"/75% of crew would border IHA Public Health
Grounds	3.000	195,280	1.500	97,640	Current staffing levels provide for "moderate dinginess"/75% of crew would border IHA Public Health
Transportation Coordinators	3.000	220,644	-	-	
Mechanics	3.000	262,963	1.000	87,654	If Student Transportation Fund funding is accepted; targeted to some buses will require mechanic
Bus Drivers	20.664	1,166,672	3.375	190,553	If Student Transportation Fund funding is accepted; targeted to some bussing/1 per FofS = 6
Trustees	9.000	99,177	3.000	35,192	School Act says boards with less than 3 trustees will be appointed
Mercer Actuarial		85,893		85,893	
Sub-Total:	525.606	42,660,235	264.252	25,266,022	
Replacement Staffing					
TTOC's - for Teacher Absence	11.223	1,101,547	8.818	865,496	Proportionate to Status Quo Regular Staffing that is Replaced
CUPE Replacement	11.379	645,396	1.930	109,465	Proportionate to Statu Quo Regular That is Replaced
Sub-Total:	22.603	1,746,943	10.748	974,961	
Total	548.208	44,407,178	275.000	26,240,982	

2017-2018 REVENUE ESTIMATE

2017-2018 Revenue

	Estimated	Optional	NOTES on Optional
Revenue			
Operating Grant - MOE	50,579,523		
Other Revenue:			
Pay Equity	330,996		
Rentals & Community Use of Facilities	117,742		
International Profit	100,000		
MOE - Carbon Reimbursement	76,000		
Interest	52,000		
Correspondence Course Fees	45,000		
MOE - Education Guarantee	11,000		
MCFD - Physio/Occupational Therapy		92,000	If we accept the funding we must include staff to provide service; not in zero-based
Industry Training Authority		70,000	If we accept the funding it is targeted; not discretionary
DASH/ASSAI Grants		50,000	If we accept the funding it is targeted; not discretionary
Private School Bussing		47,000	If we have a bus fleet we can provide the service; not included in zero-based
IHA - Health Promoting Schools		30,000	If we accept the funding we must include some service (doesn't have to be the same as it is now)
Cultural		10,000	If we accept the funding it is targeted; not discretionary
FSA Scoring		7,200	Will FSA look the same in 17-18?
Provincial Exam Marking		1,496	Will Provincial Exam Marking look the same in 17-18?
Surplus (less Reserve)		Unknown	March-April Surplus Projections to come; then allocate to 17-18 or local capital for FP
Total Revenue	51,312,261	307,696	

2017-2018 ZERO-BASED ESTIMATE

Revenue (Estimated)	51,312,261
Zero-Based Expenditures:	
Services & Supplies	3,200,673
Staffing	<u>26,240,982</u>
Total Expenditures	29,441,655
Net to “Spend” Based on 1718 Revenue	<u>21,870,606</u>

THANK YOU

FACILITATED DISCUSSION

School District No. 8 (Kootenay Lake)
DPAC/CUPE/KLTF/KLPVPA/
Board of Education/Senior Leadership
Talking Tables
Budget 2017-2018

TOPIC #1
SUCCESSION, RECRUITMENT AND RETENTION

We have experienced recruitment challenges in the district for most administrative positions in the past several years. In addition, we continue to experience challenges in hiring for various employee groups throughout the District, despite broad recruitment strategies that have included mass advertising, job fairs, recruitment at universities/colleges/training schools, and a variety of other strategies. A leadership development program for Principals/Vice-Principals and aspiring principals and vice principals was not supported in last year's budget. While we recognize that recruitment is a challenge in Districts province-wide, we would like to address both leadership succession and recruitment of all employee groups. **What recruitment and leadership development ideas could be supported through the budget process in order to address these challenges?**

School District No. 8 (Kootenay Lake)
DPAC/CUPE/KLTF/KLPVPA/
Board of Education/Senior Leadership
Talking Tables
Budget 2017-2018

TOPIC #2
MENTAL & PHYSICAL HEALTH

Health, fitness, and balance have been expressed as top priorities for students, staff and stakeholders. The District has implemented mental health clinicians, third party community services contracts in each Family of Schools, and Employee Family Assistance Plan (EFAP), Wellness initiatives and committees, Joint Safety Advisory Committee, Duty to Accommodate initiatives (flexible schedules, ergonomic equipment & training, etc.), ASIST, mental health collaborative (regional task force), student action grants and teacher action grants for mental and physical health, Healthy schools initiative, FRIENDS program for students, and movement to learning outside, strong cultural diversity, pro-d/training, etc. Health, fitness and balance continues to be identified by students, staff and stakeholders as an area of need. **What do you see as the gaps in the delivery of health services in SD8 to both students and employees, and what could the District do through the budget process to add services to address this important issue?**

School District No. 8 (Kootenay Lake)
DPAC/CUPE/KLTF/KLPVPA/
Board of Education/Senior Leadership
Talking Tables
Budget 2017-2018

TOPIC #3
SHIFTING LEARNING STRATEGIES & SPACES

Are we seeing shifts in provision of learning opportunities, for example teaching and support strategies that are individual, flexible inclusive and customized to each learner and engaging learning spaces (e.g.: outdoor, Aboriginal programs, mentorships), etc.? **What are some initiatives that have been successful and should be shared? If we are not seeing these shifts, what can the District do to support this shift through the budget process?**