Opening Remarks

Larry Clifford, Director of Education
Ministry of Education Objectives

✓ Achieving excellence
✓ Ensuring equity
✓ Promoting well-being
✓ Enhancing public confidence
Deliver a balanced budget

Preserve the classroom experience, student achievement and faith development initiatives

Maintain current level of financial reserves

Minimize staff layoffs

Deliver a balanced budget
Overview

- Annual Budget Report
- Budget preparation
- Planning Areas
- Summary and Motions
Annual Budget Report

• Accompanying document to the presentation
• Available to Parents, Students, Trustees and other Catholic School Supporters
• Contains dashboard and planning area summaries
Budget timelines

- Budget planning is a 6 month process
- Timelines are tight to satisfy policy requirements and deliberation periods as well as the Ministry submission deadline of June 27
- The BAC was engaged through this process, though the information we could give to them was limited due to our timing of balancing the budget
Planning Assumptions

Ministry

- Balanced budget
- No unsustainable use of reserves
- Targeted funds must be used for specific initiatives
- Administrative costs cannot exceed allocation
- Compliance with legislation
- GSN announcement: base for grant calculation
- Special Education funds must be spent on Spec Ed only
- Achievement & maintenance of class size ratios
- Separation of Operating & Capital funds

Board

- Balanced budget
- No unsustainable use of reserves
- Targeted funds must be used for specific initiatives
- Administrative costs cannot exceed allocation
- Compliance with legislation
- GSN announcement: base for grant calculation
- Special Education funds must be spent on Spec Ed only
- Achievement & maintenance of class size ratios
- Separation of Operating & Capital funds

Common assumptions and goals
Planning Assumptions continued

- Preserve classroom experience
- Conservative enrolment
- Board policy compliance: IV 007: Financial Planning/Budgeting
- Alignment with Board Strategic Direction
- Compliance with contracts and collective agreements
- Staff & student safety cannot be compromised
- Budget must be realistic and achievable
Changes to Budget

• Final year of implementation of FDK
• No unpaid days for staff or Voluntary Leave of Absence Plan
• 4 year phase-in of special education High Needs Amount (HNA) restructuring
• 4 year phase-in of board administration funding change
• Continued funding of School Condition Improvement grant to compliment school renewal funding
Changes to Budget continued

Status Quo

- Ministry commitment to supporting labour framework changes
  - Salaries continue to be frozen for those at the top of their grids
  - Increments on the 97th day
  - Sick leave days will remain at 11
  - Sick days allocation will continue to include expanded employee groups
  - Maternity leaves will continue to be paid at 6 - 8 weeks based on employee group
Changes to Budget continued

Increased funding in the following areas:

- 2.0% increase in transportation funding
- 2.0% increase in non-staff operations and maintenance funding
- 7.3% increase in electricity funding
Budget Challenges

Challenges faced with 2014-2015 budget preparation:

• Declining Enrolment
• Aging IT infrastructure
• Reductions with minimal classroom and staffing impact
Budget Challenges continued

Ongoing:

• Controlling supply costs
• Controlling utility costs
• Managing costs for students with individual needs
• Aging buildings
The Board’s enrolment continues to decline in both elementary and secondary

- Enrolment is a key driver for most of the grants we receive from the Ministry
- Enrolment projections are difficult to prepare and actual results will vary
- JK/K students now included as final year of FDK implemented
Enrolment continued

Elementary
- Capital Planning Department

Secondary
- Capital Planning Department
  - Secondary School Administrators

Senior Management

Budget Advisory Committee

Budget
Enrolment continued

Projected enrolment does not include:

- International students
- Pay tuition fees
- Concentrated recruitment has maintained current year over year levels

10 Elementary + 176 Secondary + Short term stays = $1.3 M profit
Enrolment continued

Board enrolment continues to decrease with a reduction of 468 students (2.2%) projected for 2014-2015 over current year forecast

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Kindergarten</td>
<td>1,260</td>
<td>1,336</td>
<td>1,197</td>
<td>(63)</td>
<td>(139)</td>
</tr>
<tr>
<td>Senior Kindergarten</td>
<td>1,386</td>
<td>1,432</td>
<td>1,427</td>
<td>41</td>
<td>(5)</td>
</tr>
<tr>
<td>Grades 1-3</td>
<td>4,394</td>
<td>4,353</td>
<td>4,310</td>
<td>(84)</td>
<td>(43)</td>
</tr>
<tr>
<td>Grades 4-8</td>
<td>7,598</td>
<td>7,535</td>
<td>7,472</td>
<td>(126)</td>
<td>(63)</td>
</tr>
<tr>
<td>Total Elementary</td>
<td>14,638</td>
<td>14,656</td>
<td>14,406</td>
<td>(232)</td>
<td>(250)</td>
</tr>
<tr>
<td>Grades 9-12</td>
<td>6,359</td>
<td>6,438</td>
<td>6,220</td>
<td>(154)</td>
<td>(218)</td>
</tr>
<tr>
<td>Total Day School Enrolment</td>
<td>20,997</td>
<td>21,094</td>
<td>20,626</td>
<td>(386)</td>
<td>(468)</td>
</tr>
</tbody>
</table>

Note: 2014 figures have been adjusted to reflect inclusion of FDK students for comparative purposes
Note: International students are not included in above totals as they are funded outside of the GSN
Enrolment continued

<table>
<thead>
<tr>
<th>Year</th>
<th>Historical</th>
<th>Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>14,656</td>
<td>6,438</td>
</tr>
<tr>
<td>2015</td>
<td>14,406</td>
<td>6,220</td>
</tr>
<tr>
<td>2016</td>
<td>14,546</td>
<td>6,013</td>
</tr>
<tr>
<td>2017</td>
<td>14,482</td>
<td>5,897</td>
</tr>
<tr>
<td>2018</td>
<td>14,443</td>
<td>5,771</td>
</tr>
</tbody>
</table>
Budget Consultation and Survey Results
Budget Advisory Committee (BAC)

BAC consists of Trustees, Community members, Principal representatives and Senior staff

• Committee tasks:
  ▪ Approving public consultation survey questions;
  ▪ Determining enrolment;
  ▪ Asking questions of management;
  ▪ Budget presentation input and
  ▪ Providing a front line perspective
Budget consultation

Consultation process same as in prior years

- 891 responses received to targeted questions
- Responses can be found in the Annual Budget Report
Budget overview

Revenue
$ 246.6M
- Ministry of Education
- Municipalities
- Other revenue

Expenditures
$ 246.6M
- Operating: $ 229.2M
- Capital: $ 17.4M

Balanced Budget
Budget overview continued

Ministry of Education

- GSN: $182.4M

Municipalities

- $50.8M

Other Revenue

- Tuition Fees: $4.3M
- Con Ed: $2.5M
- Extended Day: $1.6M
- Rent & Leases: $0.8M
- Other: $0.9M

Total Budget Allocation: $246.6M
Revenues

• Most revenue is generated by enrolment through the Grants for Students Needs (GSNs)
• The Board also receives targeted grants for specific Ministry initiatives
• Other revenues such as VISA student tuition, rental, interest income etc. are derived from known sources as well as projections based on historical trends
### Revenues continued

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenues</td>
<td>243,822,273</td>
<td>244,682,907</td>
<td>248,089,003</td>
<td>246,567,229</td>
</tr>
</tbody>
</table>

![Bar chart showing revenue trends from 2011-2012 to 2014-2015 estimates.](chart.png)
## Revenues by Planning Area

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Services</td>
<td>191,919,597</td>
<td>193,056,976</td>
<td>197,873,426</td>
<td>194,685,954</td>
</tr>
<tr>
<td>Facility Services</td>
<td>21,129,052</td>
<td>20,877,694</td>
<td>21,717,727</td>
<td>21,343,511</td>
</tr>
<tr>
<td>Capital</td>
<td>16,586,911</td>
<td>17,015,208</td>
<td>17,577,757</td>
<td>17,399,323</td>
</tr>
<tr>
<td>Transportation</td>
<td>6,436,746</td>
<td>6,372,142</td>
<td>6,358,938</td>
<td>6,392,638</td>
</tr>
<tr>
<td>Board Administration</td>
<td>7,749,967</td>
<td>7,360,887</td>
<td>6,561,155</td>
<td>6,745,803</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>243,822,273</td>
<td>244,682,907</td>
<td>248,089,003</td>
<td>246,567,229</td>
</tr>
</tbody>
</table>

### Pie Charts

- **Learning Services**: 79.0%
- **Operations**: 8.5%
- **Board Admin**: 2.7%
- **Transportation**: 2.6%
- **Capital**: 7.2%
- **Spec Ed**: 10.8%
- **Con Ed**: 4.0%
- **Program Services**: 64.2%
Expenditures

• Expenses are determined from:
  – Legislative and contractual requirements
  – Board Improvement Plan for Student Achievement & Strategic Direction
  – Board Policy and
  – Other known infrastructure needs

• All budgets are reviewed and require justification
Expenditures continued

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expenditures</td>
<td>244,247,558</td>
<td>243,929,264</td>
<td>248,089,003</td>
<td>246,567,229</td>
</tr>
</tbody>
</table>

![Bar chart showing total expenditures from 2011-2012 to 2014-2015 estimates.](chart)
## Total Expenditures by Planning Area

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Services</td>
<td>193,816,785</td>
<td>194,274,923</td>
<td>197,460,486</td>
<td>196,510,595</td>
</tr>
<tr>
<td>Facility Services</td>
<td>20,894,492</td>
<td>20,453,976</td>
<td>20,514,054</td>
<td>20,851,485</td>
</tr>
<tr>
<td>Capital and debt</td>
<td>17,167,475</td>
<td>17,346,472</td>
<td>17,577,757</td>
<td>17,399,323</td>
</tr>
<tr>
<td>Transportation</td>
<td>6,014,476</td>
<td>6,123,340</td>
<td>6,146,319</td>
<td>5,388,190</td>
</tr>
<tr>
<td>Board Administration</td>
<td>6,354,330</td>
<td>5,730,553</td>
<td>6,390,387</td>
<td>6,417,636</td>
</tr>
<tr>
<td>Total Expenditures</td>
<td>244,247,558</td>
<td>243,929,264</td>
<td>248,089,003</td>
<td>246,567,229</td>
</tr>
</tbody>
</table>

### Percentage Breakdown:

- **Program Services**: 63.9%
- **Learning Services**: [PERCENTAGE] (8.5%)
- **Board Administration**: 2.6%
- **Transportation**: 2.2%
- **Capital and Debt**: 7.1%
- **Operations**: 8.5%
- **Spec Ed**: 12.1%
- **Con Ed**: 3.5%
# Total Expenditures by Category

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; benefits</td>
<td>199,475,277</td>
<td>198,693,839</td>
<td>201,459,360</td>
<td>200,801,363</td>
</tr>
<tr>
<td>Capital and debt</td>
<td>17,167,475</td>
<td>17,955,299</td>
<td>17,577,757</td>
<td>17,399,323</td>
</tr>
<tr>
<td>School Operations &amp; Maintenance</td>
<td>5,160,858</td>
<td>4,693,216</td>
<td>5,068,048</td>
<td>4,673,703</td>
</tr>
<tr>
<td>Transportation</td>
<td>6,014,476</td>
<td>6,123,340</td>
<td>6,146,319</td>
<td>5,388,190</td>
</tr>
<tr>
<td>Supplies</td>
<td>5,893,707</td>
<td>6,507,995</td>
<td>5,164,631</td>
<td>5,387,634</td>
</tr>
<tr>
<td>Fees &amp; Contracts</td>
<td>3,521,926</td>
<td>3,379,192</td>
<td>5,336,494</td>
<td>5,253,712</td>
</tr>
<tr>
<td>Utilities</td>
<td>4,486,896</td>
<td>4,438,547</td>
<td>5,111,963</td>
<td>5,680,393</td>
</tr>
<tr>
<td>Technology</td>
<td>1,661,884</td>
<td>1,333,152</td>
<td>1,549,479</td>
<td>1,371,450</td>
</tr>
<tr>
<td>Staff Development</td>
<td>865,058</td>
<td>804,684</td>
<td>674,952</td>
<td>611,461</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>244,247,558</strong></td>
<td><strong>243,929,264</strong></td>
<td><strong>248,089,003</strong></td>
<td><strong>246,567,229</strong></td>
</tr>
</tbody>
</table>

### Pie Chart

- **Salaries & Benefits**: 81.4%
- **Capital & Debt Requirements**: 7.1%
- **School Operations & Maintenance**: 2.2%
- **Transportation**: 2.3%
- **Supplies**: 2.1%
- **Fees & Contracts**: 2.3%
- **Utilities**: 0.6%
- **Technology**: 0.2%
- **Staff Development**: 1.9%
## Accumulated Surplus

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening Accumulated Surplus</td>
<td>5,427,327</td>
<td>3,979,207</td>
<td>4,522,139</td>
<td>4,522,139</td>
</tr>
<tr>
<td>Contribution to Accumulated Surplus</td>
<td>-</td>
<td>753,921</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Draw from Accumulated Surplus</td>
<td>(1,448,120)</td>
<td>(210,989)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Closing Accumulated Surplus</td>
<td>3,979,207</td>
<td>4,522,139</td>
<td>4,522,139</td>
<td>4,522,139</td>
</tr>
</tbody>
</table>

### Composition of Accumulated Surplus

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating surplus</td>
<td>1,896,055</td>
</tr>
<tr>
<td>Network Infrastructure</td>
<td>500,000</td>
</tr>
<tr>
<td>Insurance</td>
<td>150,000</td>
</tr>
<tr>
<td>WSIB*</td>
<td>592,311</td>
</tr>
<tr>
<td>Committed capital projects*</td>
<td>746,192</td>
</tr>
<tr>
<td>Sinking fund interest*</td>
<td>637,581</td>
</tr>
</tbody>
</table>

*Note: encumbered*
<table>
<thead>
<tr>
<th>12</th>
<th>When a resident is transferred to another facility, the facility shall ensure that the resident's health record is transferred along with the resident.</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>In the event of a resident's death, the facility shall keep a copy of the resident's health record for a period of 2 years.</td>
</tr>
</tbody>
</table>

**Compliance Report**

[Further details and calculations related to Ministry Compliance]
## Staffing Changes

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Teachers</td>
<td>1,310</td>
<td>1,291</td>
<td>1,284</td>
<td>1,278</td>
<td>(6)</td>
</tr>
<tr>
<td>Child &amp; Youth Care Workers</td>
<td>54</td>
<td>69</td>
<td>84</td>
<td>57</td>
<td>(27)</td>
</tr>
<tr>
<td>Educational Assistants</td>
<td>296</td>
<td>262</td>
<td>259</td>
<td>287</td>
<td>28</td>
</tr>
<tr>
<td>Early Childhood Educators</td>
<td>32</td>
<td>76</td>
<td>112</td>
<td>120</td>
<td>8</td>
</tr>
<tr>
<td><strong>Total Classroom</strong></td>
<td><strong>1,692</strong></td>
<td><strong>1,698</strong></td>
<td><strong>1,739</strong></td>
<td><strong>1,742</strong></td>
<td><strong>3</strong></td>
</tr>
<tr>
<td>School &amp; Board Administration</td>
<td>230</td>
<td>223</td>
<td>221</td>
<td>223</td>
<td>2</td>
</tr>
<tr>
<td>Facility Services</td>
<td>201</td>
<td>191</td>
<td>192</td>
<td>192</td>
<td>-</td>
</tr>
<tr>
<td>Other Support Staff</td>
<td>166</td>
<td>154</td>
<td>157</td>
<td>163</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total Staff</strong></td>
<td><strong>2,289</strong></td>
<td><strong>2,266</strong></td>
<td><strong>2,309</strong></td>
<td><strong>2,320</strong></td>
<td><strong>11</strong></td>
</tr>
</tbody>
</table>
Budget Risks

Enrolment projections vary from actual results
  • Low risk given conservative approach applied by BAC

Utility costs are subject to weather & pricing fluctuations
  • Trending will be reviewed as the year progresses

Sick leave plan usage
  • Impact on supply costs difficult to predict

Denial of health and dental premium reduction
  • Anticipated approval by Ministry, however still a risk
Budget Reductions

Staffing:

- Staffing related to enrolment decline
- CYCWs as related to Spec Ed delivery model change
- 2 layoffs
Budget reductions continued

Deferrals:
- Administrative computer renewal
- Maintenance equipment purchases
- Chromebooks and carts
- Wireless infrastructure

Other:
- Overall reduction of non-staff budgets
- Reduction of maintenance and custodial supplies
- Contingencies for EA, supply teachers and utilities
Planning Areas
Planning Areas

Academic
- Program Services
- Student Services
- School Budgets
- Continuing Education

Infrastructure
- Facility Services
- Capital and debt

Support
- Administration
- Student Transportation

Note: Further information on each planning area can be found in the Annual Budget Report
Capital and Debt
### Capital and Debt

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Capital</td>
<td>17,167,475</td>
<td>17,346,472</td>
<td>17,577,757</td>
<td>17,399,323</td>
</tr>
</tbody>
</table>

![Bar chart showing Debt Interest and Amortization for different years.](chart.png)
Capital and debt continued

Capital and debt is comprised of:

• Interest on long term debt
• Depreciation of capital assets
  • mTCA
  • Buildings and equipment

School Condition Improvement funding ($2.5M) will be received again to address renewal needs in older schools (built prior to 2007)
Capital and debt continued

• Board continued commitment to dispose of surplus real estate:
  – Sacred Heart
  – St. Patrick
  – Monsignor Gleason
  – St. Louis Cambridge
  – ARC closures as required

St. Gabriel CES, April 2014
Capital and debt continued

**New Capital Priorities**
- St. Anne (C) addition $3.0M
- Holy Spirit addition $1.9M

**2014-2015 Projects**
- School Renewal $2.3M
- School Condition Improvement $2.5M

**2013-2014 Completions**
- St. Gabriel new school $1.4M
- St. Aloysius addition $1.9M
- FDK projects various sites $0.5M

**Land purchases**
- East Kitchener Secondary site $7.5M
- St. Boniface Elementary site $1.8M
- Huron-Brigadoon site $3.8M
Capital and debt continued

Areas of focus for the upcoming year:

- St. Anne (C) addition
- Holy Spirit addition
- St. Aloysius renovation*
- School Condition Improvement and renewal spending to address system infrastructure needs

*Note: project costs are not included in the budget as they will be financed once complete
Administration
## Administration

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustees</td>
<td>250,763</td>
<td>206,011</td>
<td>224,257</td>
<td>215,401</td>
</tr>
<tr>
<td>Director &amp; SO's</td>
<td>1,234,376</td>
<td>1,175,715</td>
<td>1,230,677</td>
<td>1,222,297</td>
</tr>
<tr>
<td>Board Administration</td>
<td>4,869,191</td>
<td>4,348,827</td>
<td>4,935,453</td>
<td>4,979,938</td>
</tr>
<tr>
<td><strong>Total Administration</strong></td>
<td><strong>6,354,330</strong></td>
<td><strong>5,730,553</strong></td>
<td><strong>6,390,387</strong></td>
<td><strong>6,417,636</strong></td>
</tr>
</tbody>
</table>

![Bar Chart](chart.png)
Student Transportation
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6,014,476</td>
<td>6,123,340</td>
<td>6,146,319</td>
<td>5,388,190</td>
</tr>
</tbody>
</table>
Significant changes in Student Transportation:

- Bell time change
  - $1M savings
  - Allowed for routing efficiencies
  - Implemented by both boards

- 33% increase in Grand River Transit fares
  - GRT passes reduced significantly
  - Greater use of yellow bus at reduced cost
Future focus for student transportation:

- Re-negotiation of bus and taxi operator contracts which expire August 2014
- Collective bargaining with employees
- Further efficiencies to be explored with minimal impact
- Continued focus on student safety, ride time as well as assessing operator performance
Facility Services
Facility Services

Significant funding changes in Facility Services:

- 7.3% increase for electricity
- 2.0% increase in non-staff operations and maintenance funding (supplies, contracts, etc.)
## Facility Services Detail

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Benefits</td>
<td>11,197,498</td>
<td>10,905,449</td>
<td>11,213,062</td>
<td>10,882,190</td>
</tr>
<tr>
<td>Utilities</td>
<td>4,660,231</td>
<td>4,438,547</td>
<td>4,802,788</td>
<td>5,461,512</td>
</tr>
<tr>
<td>Contracts &amp; Supplies</td>
<td>4,482,728</td>
<td>4,510,816</td>
<td>3,818,303</td>
<td>4,006,775</td>
</tr>
<tr>
<td>Other</td>
<td>554,035</td>
<td>599,164</td>
<td>679,901</td>
<td>501,008</td>
</tr>
<tr>
<td><strong>Total Facility Services</strong></td>
<td><strong>20,894,492</strong></td>
<td><strong>20,453,976</strong></td>
<td><strong>20,514,054</strong></td>
<td><strong>20,851,485</strong></td>
</tr>
</tbody>
</table>

### Bar Chart

- **Salaries & Benefits**
- **Utilities**
- **Contracts & supplies**
- **Other**

---

Thousands of Dollars

- 2011-2012 Actual
- 2012-2013 Actual
- 2013-2014 Estimates
- 2014-2015 Estimates
Importance of the Learning Environment:

**Elementary**
- School enrolment: 98 to 688 ADE
- Space utilization: 58% to 158%
- Square footage increase since 2011: 100,600
- EcoSchool certification: 5 gold, 3 silver, 1 bronze

**Secondary**
- School enrolment: 967 to 1,729 ADE
- Space utilization: 99% to 124%
- EcoSchool certification: 1 silver, 1 bronze
Facility Services continued

Importance of the Learning Environment continued:

• Importance of utilization rates:
  – Surplus capacity = vacant rooms
  – Excess capacity = portables (91)

• Management of school utilization:
  – ARCs & boundary reviews
  – SBEM recommendations
Facility Services continued

Current year focus:

• Energy efficient lighting upgrades
• Emergency Management Plan
• Renewal projects from 3 year plan
• Solar projects
Facility Services continued

Future focus:

• Solar projects for next round of applications
• Ensuring the Board is as energy efficient as possible
• Working with schools re: renewal needs
• Department re-organization
Learning Services
Learning Services

Learning Services is comprised of:

• Program Services
• Student Services – Special Education
• School Budgets
• Continuing Education
Learning Services makes up 85.7% of entire budget allocation

Within that, 94.1% of the budget is salaries and benefits

Salaries included: teachers, principals, vice principals, support staff such as EAs, CYCWs, ECEs and other school staff

EPOs are usually directly beneficial to Learning Services initiatives
Learning Services continued

Elementary

- 100% of JK-3 classes contain 23 or fewer pupils
- 93% of JK-3 classes contain 20 or fewer pupils
- Grade 4-8 Board-wide average class size of 24.5 pupils

Secondary

- Grade 9-12 Board-wide average class size of 22 pupils
# Learning Services continued

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>152,277,696</td>
<td>154,325,010</td>
<td>157,253,446</td>
<td>155,760,014</td>
</tr>
<tr>
<td>Special Education</td>
<td>29,028,425</td>
<td>27,880,037</td>
<td>27,837,735</td>
<td>29,519,859</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>9,804,355</td>
<td>9,332,524</td>
<td>9,822,676</td>
<td>8,606,517</td>
</tr>
<tr>
<td>School Budgets</td>
<td>2,706,309</td>
<td>2,737,352</td>
<td>2,546,629</td>
<td>2,624,205</td>
</tr>
<tr>
<td><strong>Total Learning Services</strong></td>
<td><strong>193,816,785</strong></td>
<td><strong>194,274,923</strong></td>
<td><strong>197,460,486</strong></td>
<td><strong>196,510,595</strong></td>
</tr>
</tbody>
</table>

![Bar chart showing expenditure categories for different years]
## Learning Services: Program Services Detail

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; benefits</td>
<td>146,166,501</td>
<td>148,063,723</td>
<td>150,245,775</td>
<td>148,993,391</td>
</tr>
<tr>
<td>Text books &amp; instructional supplies</td>
<td>1,430,011</td>
<td>1,756,140</td>
<td>1,580,447</td>
<td>1,966,385</td>
</tr>
<tr>
<td>Contracts &amp; other services</td>
<td>2,574,443</td>
<td>3,247,576</td>
<td>4,591,400</td>
<td>4,223,812</td>
</tr>
<tr>
<td>Staff development</td>
<td>570,634</td>
<td>538,689</td>
<td>441,891</td>
<td>350,396</td>
</tr>
<tr>
<td>Other</td>
<td>1,536,107</td>
<td>718,882</td>
<td>393,933</td>
<td>226,030</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>152,277,696</strong></td>
<td><strong>154,325,010</strong></td>
<td><strong>157,253,446</strong></td>
<td><strong>155,760,014</strong></td>
</tr>
</tbody>
</table>

**Bar Chart:**
- **Salaries & Benefits** in blue
- **Textbooks & Supplies** in red
- **Contracts** in green
- **Staff Development** in purple
- **Other** in teal
## Learning Services: Student Services Detail

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary &amp; Benefits</td>
<td>27,821,111</td>
<td>26,641,275</td>
<td>26,565,316</td>
<td>28,239,954</td>
</tr>
<tr>
<td>Textbooks &amp; Instructional Supplies</td>
<td>180,897</td>
<td>167,264</td>
<td>240,780</td>
<td>192,252</td>
</tr>
<tr>
<td>Contracts</td>
<td>171,144</td>
<td>152,179</td>
<td>252,625</td>
<td>212,625</td>
</tr>
<tr>
<td>Staff Development</td>
<td>102,552</td>
<td>106,471</td>
<td>100,285</td>
<td>111,556</td>
</tr>
<tr>
<td>Other</td>
<td>752,721</td>
<td>812,848</td>
<td>678,729</td>
<td>763,472</td>
</tr>
<tr>
<td><strong>Total Special Education</strong></td>
<td><strong>29,028,425</strong></td>
<td><strong>27,880,037</strong></td>
<td><strong>27,837,735</strong></td>
<td><strong>29,519,859</strong></td>
</tr>
</tbody>
</table>

The bar chart illustrates the expenditure for each category from 2011-2012 to 2014-2015, with colors indicating different expenditure categories.
### Learning Services: School Budgets

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>1,539,756</td>
<td>1,523,121</td>
<td>1,455,698</td>
<td>1,566,243</td>
</tr>
<tr>
<td>Secondary</td>
<td>1,166,553</td>
<td>1,214,231</td>
<td>1,090,931</td>
<td>1,057,962</td>
</tr>
<tr>
<td><strong>Total School Budgets</strong></td>
<td><strong>2,706,309</strong></td>
<td><strong>2,737,352</strong></td>
<td><strong>2,546,629</strong></td>
<td><strong>2,624,205</strong></td>
</tr>
</tbody>
</table>

---

**Chart Description:**
- **Y-axis:** Thousands of Dollars
- **Legend:**
  - Blue: Elementary
  - Red: Secondary
Learning Services: School Budgets

School budgets are a function of enrolment

School Budget allocations should:

• Cover resources, materials and supplies for school
• Supply teacher costs – local PD
• Library resources
• Replacement furniture
• Reflect the school needs and improvement plans
Learning Services continued

Ministry Priorities for Education:

- Achieving excellence
- Ensuring equity
- Promoting well-being
- Enhancing public confidence
Learning Services continued

Learning Services budget focus:

• Addressing Board priorities
  • Faith Development and
  • Student Achievement
• Reflecting the Ministry priorities and initiatives
Reflection of Board Ends:

1. Learners:
   a) Live their faith

   I. where faith practice forms an integral part of their daily lives as members of the school community.

   II. where they have knowledge of the history, teaching, values and doctrines of the Catholic faith.

   III. where they are contributors to society, dedicated to the common good.
Reflection of Board Ends continued:

2. Learning communities:
   a) are lived models of our Catholic faith
      I. where all are welcomed.
      II. where all are treated with respect.
      III. where all are caring stewards of their world.
   b) are inclusive:
      I. where everyone understands that our faith calls us to inclusion.
      II. where there is a continual renewal of commitment to the inclusion of all.
      III. where all students experience instruction and assessment that is differentiated based on their needs.
      IV. where all students are entitled to be in their home school in age appropriate classrooms.
   c) act as a part of a greater whole, recognizing their interdependence within the home, school and parish triad
Learning Services: Faith Development

Areas of focus for the upcoming year:

• Catholic Graduate Expectations
• Equity and Inclusion
• Spiritual Development Day
• Retreat Experiences
• Dominican Encounter
Learning Services: Faith Development

Our budget priority reflects our commitment to our Catholic distinctiveness.

Budget is allocated and protected to support:

- Pastoral Care Teams
- Chaplaincy leaders
- Safe schools
- Poverty
Programming Highlights:

Safe Schools

• Funding: $0.3M (same as prior year)
• Promotes an inclusive and safe school environment and raises awareness of respectful classrooms
• All schools participate in programs
  ▪ Imagine Program
  ▪ PALS program
  ▪ WE Schools Action Team
Learning Services: Faith Development

Equity and Inclusion

• Funding: Internally earmarked

• Restorative Justice
  • Commitment to a restorative approach to relationships, learning, and discipline

• Supporting students of a sexual minority

• Spiritual Development Day
Future Focus:

• Updating faith curriculum
  ▪ Update Religious education curriculum
  ▪ Fully Alive program
First Nations, Metis and Inuit Education (FNMI)

- Funding: $0.4M ($0.2M increase over prior year)
- Supports Native Studies classes including teacher and resources
- Ministry initiative to provide education and awareness
- Aboriginal co-ordinator will be centralized at the Board Office next year
- The Board continues to see increased credits earned at the secondary schools annually
- The Board will continue to bring Aboriginal elders to schools to share experiences and cultures
Reflection of Board Ends:

1. Learners:
   
   b) Achieve academic success
      
      I. which is reflected by WCDSB results that significantly exceed provincial standards as measured in EQAO and literacy tests.
      
      II. where they have knowledge and skills to pursue suitable career and life paths.
Learning Services: Student Achievement

Areas of focus for the upcoming year:

- School Effectiveness Framework (K-12)
- Learning For All (K-12)
- Growing Success (K-12)
- Inquiry based learning (K-12)
- Monitoring & increasing success of students on IEP’s and English Language Learners
- Assistive technologies
- Literacy, Numeracy, Pathways, Community, Culture & Caring
- Secondary credit accumulation & graduation rates
- EQAO (Grades 3, 6, 9 & 10)
- Targeted Ministry funding: Aboriginal Education, Equity and Inclusion, Mental Health etc.
Areas of focus for the upcoming year:

- Instructional rounds
- School based rounds
- Continued numeracy networks
- Math for Young Children project in partnership with Trent University and the Ministry
Research demonstrates that students who meet the provincial standard early in their schooling are most likely to maintain that high achievement in secondary school.

Students who do not meet the provincial standard early in their schooling are most likely to struggle in later grades.
Learning Services: Student Achievement

EQAO continued:

2012 - 2013 EQAO Results

Board  Province
Learning Services: Student Achievement

Programming Highlights:
• Early Learning
• Literacy and Numeracy Supports
• Student Success
• 21st Century Learning
• Specialist High Skills Major (SHSM)
• Alternative Learning Program at St. Don Bosco
• First Nations, Metis & Inuit Education (FNMI)
• Principal Learning Teams
• Networks

Our Priorities within Learning Services:
• Maintain our focus on schools working with schools to provide professional learning for staff
Learning Services: Student Achievement

Early Learning Program timeline

Year 1  8 schools
       No extended day

Year 2  11 schools  3 extended day

Year 3  22 schools  13 extended day

Year 4  36 schools  21 extended day

Year 5  46 schools  23 extended day
Learning Services: Student Achievement

Early Learning
- Funding now included in GSN
- Continues to assist teaching and support staff
- Provides special needs and facilities support
- 2,624 Early Learning pupils

Extended Day
- Fees received estimated to be $1.6M
- Program expanded to 23 viable sites with either before or after care
- Operates on board-wide break-even program

Core Day
- Teacher & ECE team
- EA support
- Focus on play-based learning
- Early Learning curriculum

Extended Day
- Extension of core day
- Cost recovery basis
- Partnership with Region
- 514 students registered
Student Success

- Funded $0.8M (same as prior year)
- Provides for 2 literacy/numeracy teachers
- Support for Student Success Lead
- Student Success initiatives
  - Student Voice
  - Adolescent Literacy Cross Panel
  - Numeracy Cross Panel
  - Student Success Cross Panel
  - Blended Learning
  - Bright Links
  - IPP/Career Cruising Prof Learning
  - School Learning Teams
Student Success continued:

- Literacy and Numeracy Support
  - NFL, Strong Start, Skills Builder, Student Work Study, Intervention Math Programs

- Family of Schools Strategic Professional Learning Support Model funded through external sources other than program (i.e. GSN and EPO)

- Strategic Family of Schools model where consultants will have Family of Schools school improvement duties as part of their portfolio
21\textsuperscript{st} Century Learning

- Funding: $0.1M (same as prior year)
- Supports full time 21\textsuperscript{st} Century Learning champion

Student Outcomes for 21\textsuperscript{st} Century Teaching and Learning

- Creativity, Entrepreneurship and Innovation
- Communication and Collaboration
- Research and Information Fluency
- Critical Thinking and Problem-Solving
- Digital Citizenship and Stewardship
- Technology Operations and Concepts
Student Success continued:

Working Groups:

- The 21st Century Classroom and Environment
- Library as Learning Commons
- Role of Technology
- Student Voice and Parent Engagement
- Digital Citizenship and Social Media
- Community Partnerships

Dedicated staffing to support student success:

- 14.8 teachers at all secondary sites
- 2 Student Success consultants
- 2.5 Attendance Counselors
Learning Services: Student Achievement

Specialist High Skills Major

• Funding: $0.5M (same as prior year)
• Encourages students to focus their secondary school education on a career area of their choice
• Board is a Provincial leader in SHSM programming
• 45 programs in 12 major areas available from arts to construction

SHSM Quick Facts:
✓ Over 1,100 active participants:
  ✓ >700 Grade 11
  ✓ >400 Grade 12
✓ Over 3,500 certificates earned
✓ Boards’ Red Seal rate: 29%
Alternative Learning Program at St. Don Bosco

• Funding: Internally earmarked

• The Board will continue to offer flexible, adaptable and relevant programs to students to assist them with earning high school credits
Learning Services: Student Achievement

**Special Education**
- Funding: $28.4M

**Budget has been presented and reviewed by SEAC**

The Board will continue to meet student learning needs with programs such as:
- Corrective Reading
- Empower
- Learning Language and Loving It
- Autism Pro
- Assistive Technology
Importance of the Learning Environment:

Levels of Support

- Pervasive
- Extensive
- Limited
- Intermittent

Universal Learning Components for All Students

- Universal Design for Learning
- Diversity of Student Needs
- Learning Styles
- Differentiated Instruction
- Social/Behavioral Expectations
- Classroom Management
- Assessment
- Evaluation
- Multiple Intelligences
- Accommodations
- Understanding Behavior
- Cooperative Learning
- Program Planning
- Classroom Routines and Expectations
- Use of Technology

Inclusion

Education for All

*Special Education Services: A student’s IEP drives the program and service provided to a student. It is developed collaboratively with input from the Parent, Principal, Special Education Teacher, Classroom Teacher, Collaborative Team, and Community Agencies.*
Allocation of Education Assistants and CYCW’s

• Data driven decision
• Data collection tool to identify anticipated pupil need
• Meetings with all schools
PPM 156

- The physical, emotional, and learning needs of the student are considered when developing a transition plan, to determine if the student requires support when making transitions. Students make transitions in a variety of contexts: upon entry to school; between grades; from one program area or subject to another; when moving from school to school or from an outside agency/facility to a school; from elementary to secondary school; and from secondary school to the next appropriate pathway.

- Every transition plan will identify specific transition goals, support needs, the actions required to achieve the goals, roles and responsibilities, and timelines for the implementation and/or completion of each of the identified actions.
Mental Health

- Funding: $0.1M

The WCDSB’s *Mental Health Strategy* involves:

- Heightened emphasis on organizational conditions for effective school mental health at senior levels;
- Alignment with related initiatives (e.g., Accepting and Safe Schools, Student Success);
- Enhanced mental health awareness/literacy efforts;
- Resource mapping and
- Movement towards a System of Care Model that emphasizes mental health promotion and prevention.

The role of the WCDSB *Mental Health Lead* is to:

- Provide leadership for the mental health team;
- Conduct board and school level resource mapping;
- Work with senior administration to develop, execute and monitor the board mental health and addictions strategy;
- Collaborate with board/community professionals to consolidate processes to promote clear and integrated access to services;
- Coordinate systematic mental health literacy initiatives; and,
- Select and support evidence-based approaches to mental health promotion and prevention.
Future Focus:

- Instructional Rounds
- Student Success and Mental Health
- 21st Century Learning
- Learning for All
- Transition Planning for our students
- Equity and Inclusion
Learning Services:
Continuing Education
Learning Services: Continuing Education

St. Louis funding sources

- GSN: $4.2M
- MCI: $1.8M
- CIC & MTCU: $1.6M
- Student Fees: $1.0M

Total Revenues: $8.6M
# Learning Services: Continuing Education

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Benefits</td>
<td>8,945,800</td>
<td>8,597,684</td>
<td>8,413,483</td>
<td>7,628,107</td>
</tr>
<tr>
<td>Supplies</td>
<td>650,427</td>
<td>509,025</td>
<td>1,284,428</td>
<td>848,958</td>
</tr>
<tr>
<td>Contracts</td>
<td>132,455</td>
<td>168,712</td>
<td>81,636</td>
<td>63,312</td>
</tr>
<tr>
<td>Other</td>
<td>75,673</td>
<td>57,103</td>
<td>43,129</td>
<td>66,140</td>
</tr>
<tr>
<td><strong>Total Continuing Education</strong></td>
<td><strong>9,804,355</strong></td>
<td><strong>9,332,524</strong></td>
<td><strong>9,822,676</strong></td>
<td><strong>8,606,517</strong></td>
</tr>
</tbody>
</table>

![Bar chart](chart.png)
St. Louis Adult Learning and Continuing Education Centre

- Supporting the community for over 25 years
- Specializes in secondary school credits (SSC), language training and workplace skills training
Changes to budget

• PSW course in Fergus eliminated

• Reallocation of St. Louis (C) to St. Benedict and St. Louis Kitchener

Reallocated:

– PSW & CorE (LBS)
– ESL
– OYAP Hair

▪ Eliminated: SSC Teacher Directed classes
Learning Services: Continuing Education

Changes to budget continued:

- Labour framework impacts
  - Unknown usage and cost of due to MOU
    - Sick leave
    - maternity leave
    - Short Term Disability
  - Only 1 year of trending, could result in unexpected variances
Program Highlights

• Relocation of St. Louis Cambridge to reduce infrastructure costs and increase profile while maintaining a Cambridge presence
• Anticipate a small increase to enrolment due location changes
• Financial modelling for programs revised to better assess viability
Future Focus

• Continued review and monitoring of programs for viability
• Continued marketing and promotion of programs
• Continued commitment to assessing future needs
  – Strategic Planning Committee
  – Address future accommodation needs
  – Long term planning for St. Louis
Overall Board
Future Focus
Future Focus

- Addressing continued declining enrolment and ensuring financial sustainability
- Reviewing spending and associated funding sources
- Contract negotiations
- Accommodation and Boundary Reviews
Areas of Concern within the Budget

• Declining enrolment/projections
• Aging IT infrastructure
• Utility volatility
• Contingencies

RISK MANAGEMENT
- Identify
- Assess
- Control
- Monitor & Review

www.wcdsb.ca
Summary

• The budget is balanced.
• Question period for Trustees: June 2 – 22, 2014.
• Budget Submission Date – June 27, 2014.
• The budget is compliant with board policy and Ministry requirements.
• There is inherent risk in some areas of the budget.
Proposed Budget Motions

1. That the Board of Trustees approve an operating budget of \$229,167,906 for the 2014-2015 school year.

2. That the Board of Trustees approve a capital budget of \$17,399,323 for the 2014-2015 school year.

3. That the Board of Trustees directs Administration to file this balanced budget with the Ministry of Education before the deadline of June 27, 2014.
Questions?

Further questions can be submitted to: budget@wcdsb.ca prior to June 23rd