

CENTRAL OKANAGAN PUBLIC SCHOOLS 2018-2019 ANNUAL BUDGET PRESENTATION



Delta Carmichael, CPA, CA
Assistant Secretary Treasurer
February 4, 2019

CENTRAL OKANAGAN PUBLIC SCHOOLS

OVERARCHING GOAL

Each Central Okanagan Public School student (K-12) will provide evidence of being a Learner, Thinker, Innovator, Collaborator and Contributor



Learner – engaged, resilient and seeks to understand;

Thinker – analyzes, makes connections and asks questions;

Innovator – sees possibilities and generates original ideas;

Collaborator – excels at working with others to create understanding;

Contributor – participates in local and global community.

CENTRAL OKANAGAN PUBLIC SCHOOLS PRESCHOOLS, STRONG START CENTERS & PARTNERS

WORKING WITH 13 PRESCHOOLS



8 STRONG START CENTERS



& OUR PARTNERS

CENTRAL OKANAGAN TEACHERS ASSOCIATION (COTA)
CANADIAN UNION OF PUBLIC EMPLOYEES (CUPE)
CENTRAL OKANAGAN PRINCIPAL'S/VICE PRIN. ASSOC.(COPVPA)
CENTRAL OKANAGAN PARENT ADVISORY COUNCIL (COPAC)
DISTRICT STUDENT COUNCIL (DSC)

CENTRAL OKANAGAN PUBLIC SCHOOLS

WHAT HAS CHANGED, 2001 – 2019

o Learning Transformation

- o New Curriculum K-12
- o Personalized Learning
- o Student Assessment
- o Distributed Learning
- o Dual Credit Programs & Academies
- o Instructional Leadership Team
- o International Education Program
- o MoA 17 (restored language, Classroom Enhancement Fund)
- o Preschool, Strong Start Programs
- o Expansion of French Immersion
- o Full Day K Implementation
- o Grade Reconfiguration in Rutland & Westside
- o Social Justice (Anti-Bullying, Harmony Day, SOGI, We Schools)

o Administration

- o School Cash Online
- o Online Enrolment (Registration)
- o Admin & Employee Connect, School Books (web based)
- o Direct Deposit to Vendors / Direct Debit from Customers / Online Payment of Invoices
- o WCB Claims Management Services



CENTRAL OKANAGAN PUBLIC SCHOOLS

WHAT HAS CHANGED, 2001 – 2019

o Operational

- o Mar Jok, Watson, Chute Lake, Dr. Knox, Constable Neil Bruce, Okanagan Mission, Kelowna Secondary, New Board Office, Canyon Falls Middle and the start of H.S. Grenda Middle
- o Expansion of Health & Safety regulations
- o Natural gas busing, geothermal heating & carbon tax offset (utility management)



o Technology

- o Refresh Program
- o Bring Your Own Device (BYOD)
- o Social Media (Facebook, YouTube, Instagram, Snapchat)

o Human Resources

- o 3 negotiation cycles for both COTA and CUPE collective agreements
- o Online application process
- o Teacher posting system

CENTRAL OKANAGAN PUBLIC SCHOOLS

CANADA & BRITISH COLUMBIA EARNS HIGH MARKS ON EDUCATION

REPORT CARD

Education and Skills

1	Japan	A	3	B.C.	B	9	Netherlands	C	16	Norway	D
2	Finland	A	4	Ont.	B	10	Que.	C	17	Man.	D
			5	Alta.	B	11	Germany	C	18	Ireland	D
			6	Canada	B	12	N.S.	C	19	Denmark	D
			7	Australia	B	13	U.K.	C	20	Austria	D
			8	Switzerland	B	14	Belgium	C	21	Sask.	D
						15	Sweden	C	22	N.B.	D
									23	U.S.	D
									24	N.L.	D
									25	France	D
									26	P.E.I.	D-

Source: The Conference Board of Canada.

British Columbia is 1st in Canada and 3rd in the world according to The Conference Board of Canada.

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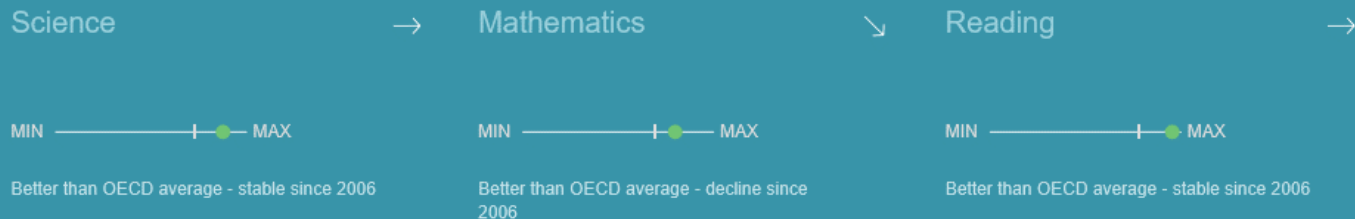
2015 PISA (PROGRAM FOR INT'L STUDENT ASSESSMENT)

STUDENT ACHIEVEMENT FOR CANADA

Canada ⓘ

This section presents country performance compared to the OECD average and medium term trends. It covers all the main PISA subject areas and a summary for the equity challenges the country might face. Scroll down for more detailed indicators and cross country comparisons.

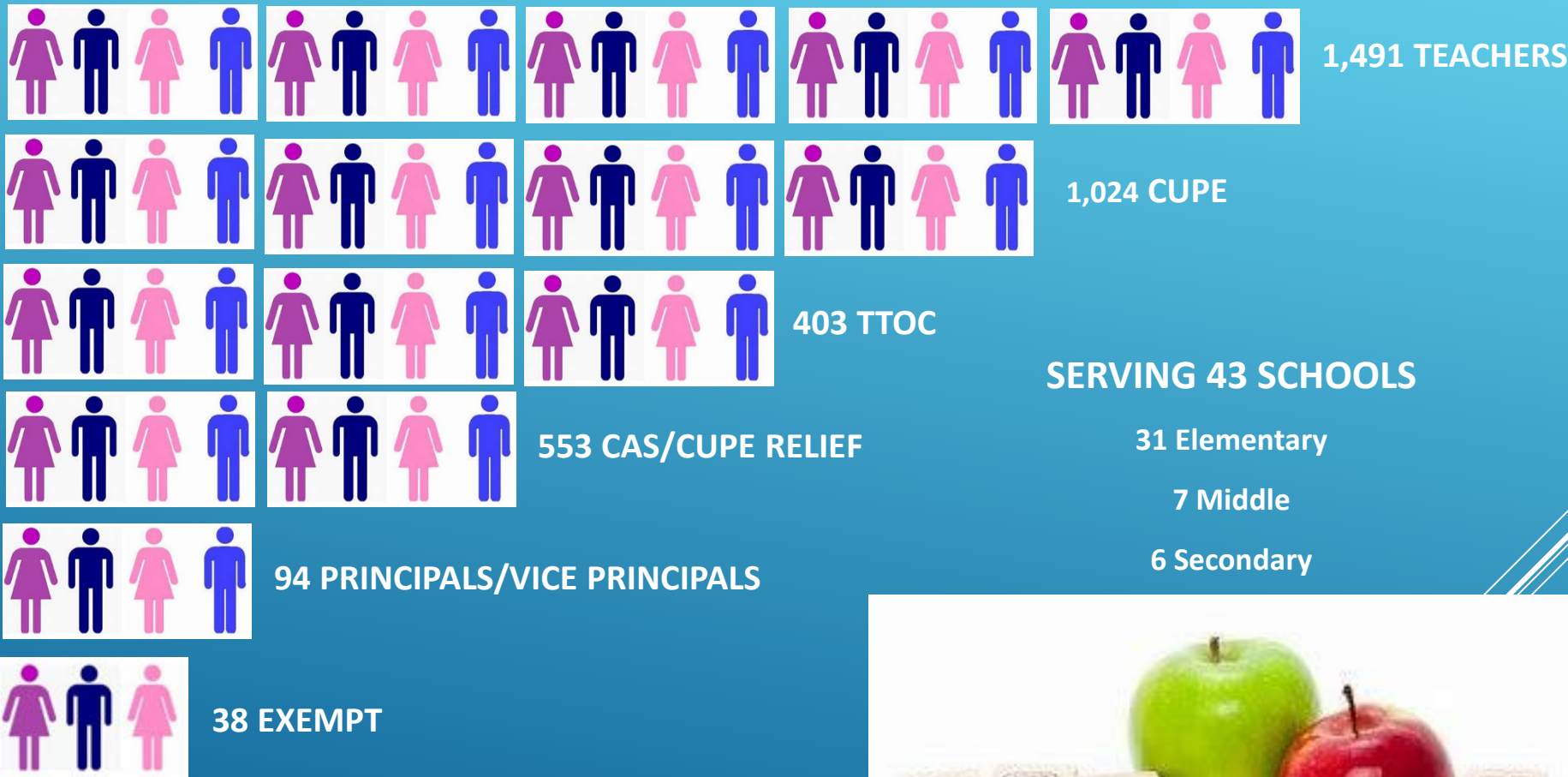
PERFORMANCE



EQUITY



CENTRAL OKANAGAN PUBLIC SCHOOLS STAFFING (HEAD COUNT) & SCHOOLS

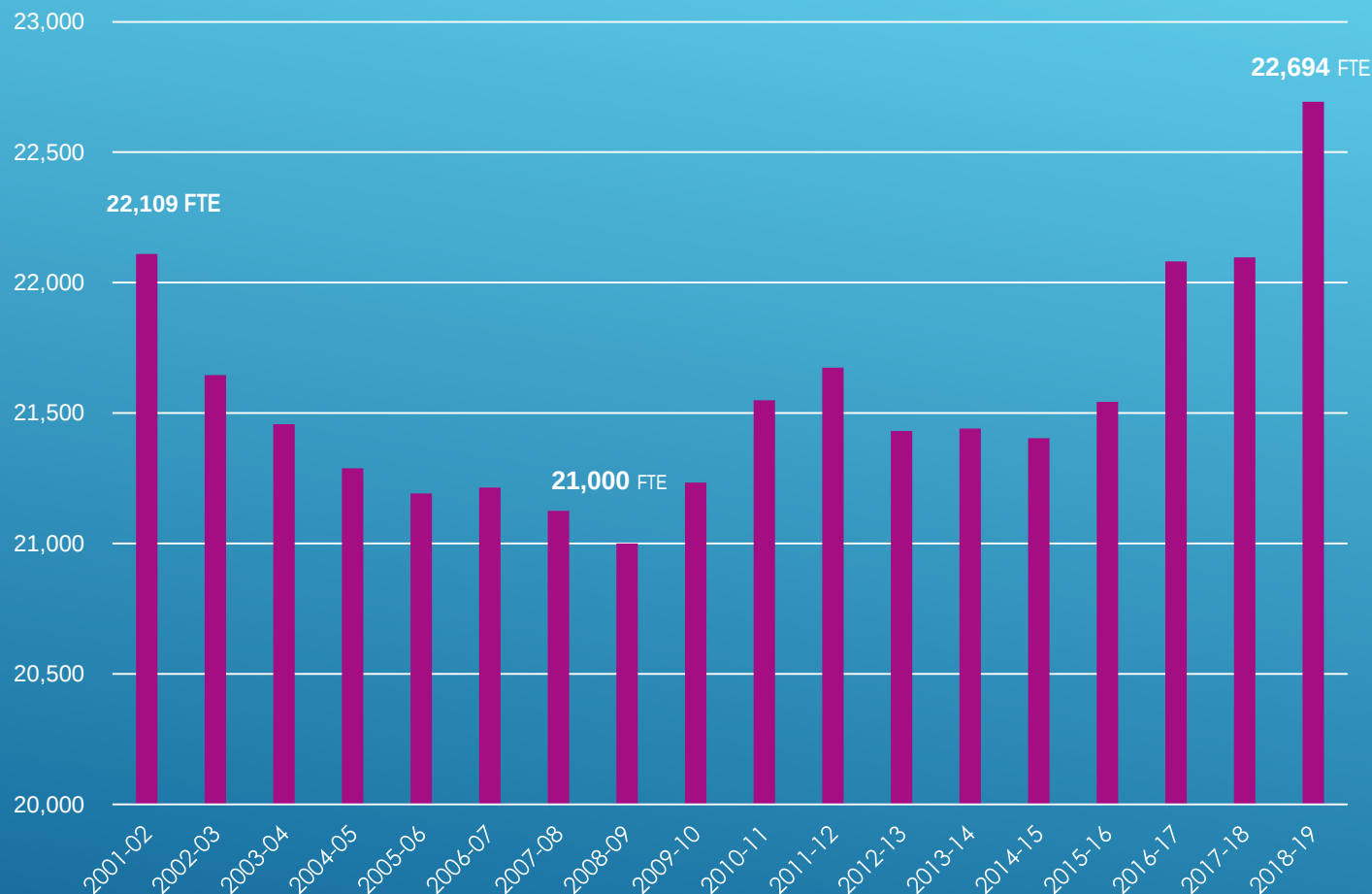


HEAD COUNT OF OVER 3,600 EMPLOYEES



CENTRAL OKANAGAN PUBLIC SCHOOLS

FINANCIAL INCOME SOURCES – MINISTRY OF EDUCATION FUNDED ENROLMENT



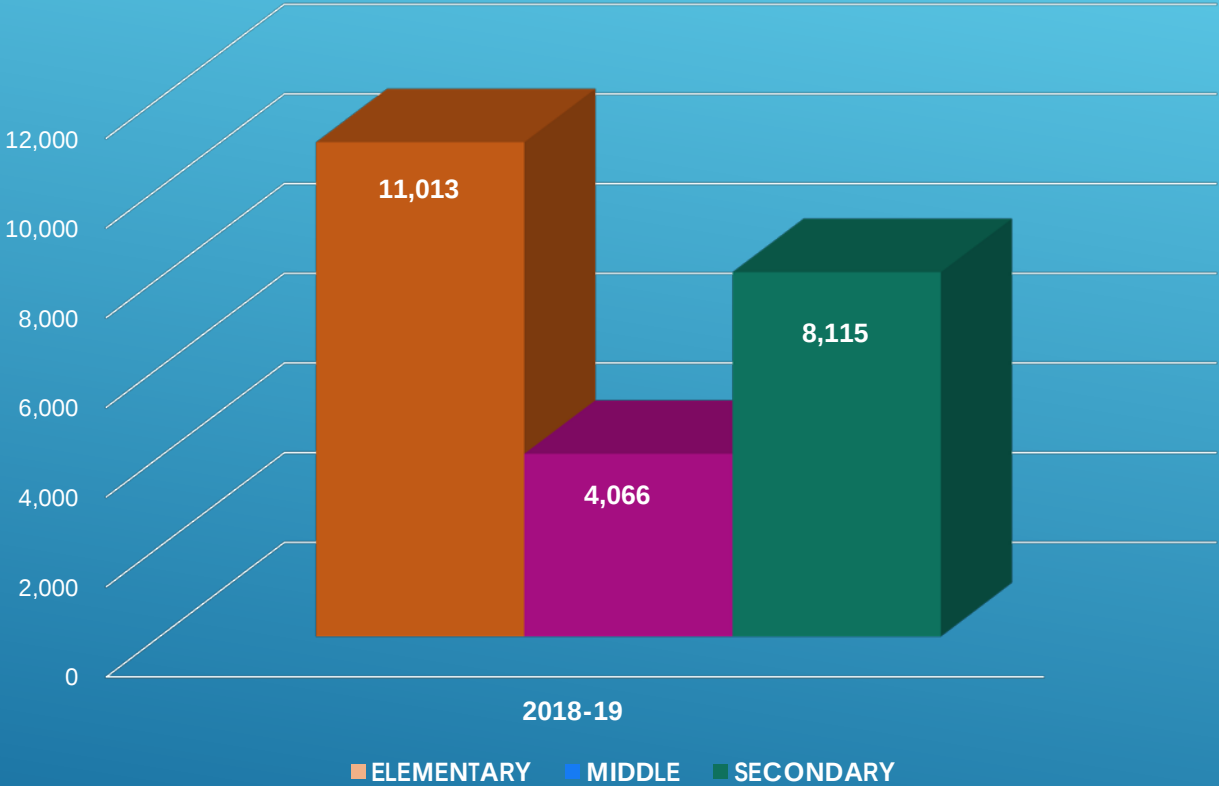
Above figures do not include our International Education FTE (full time equivalent)

2002 Int'l Ed. FTE = 0

2018 Int'l Ed. FTE = 400

CENTRAL OKANAGAN PUBLIC SCHOOLS

STUDENTS BY HEADCOUNT

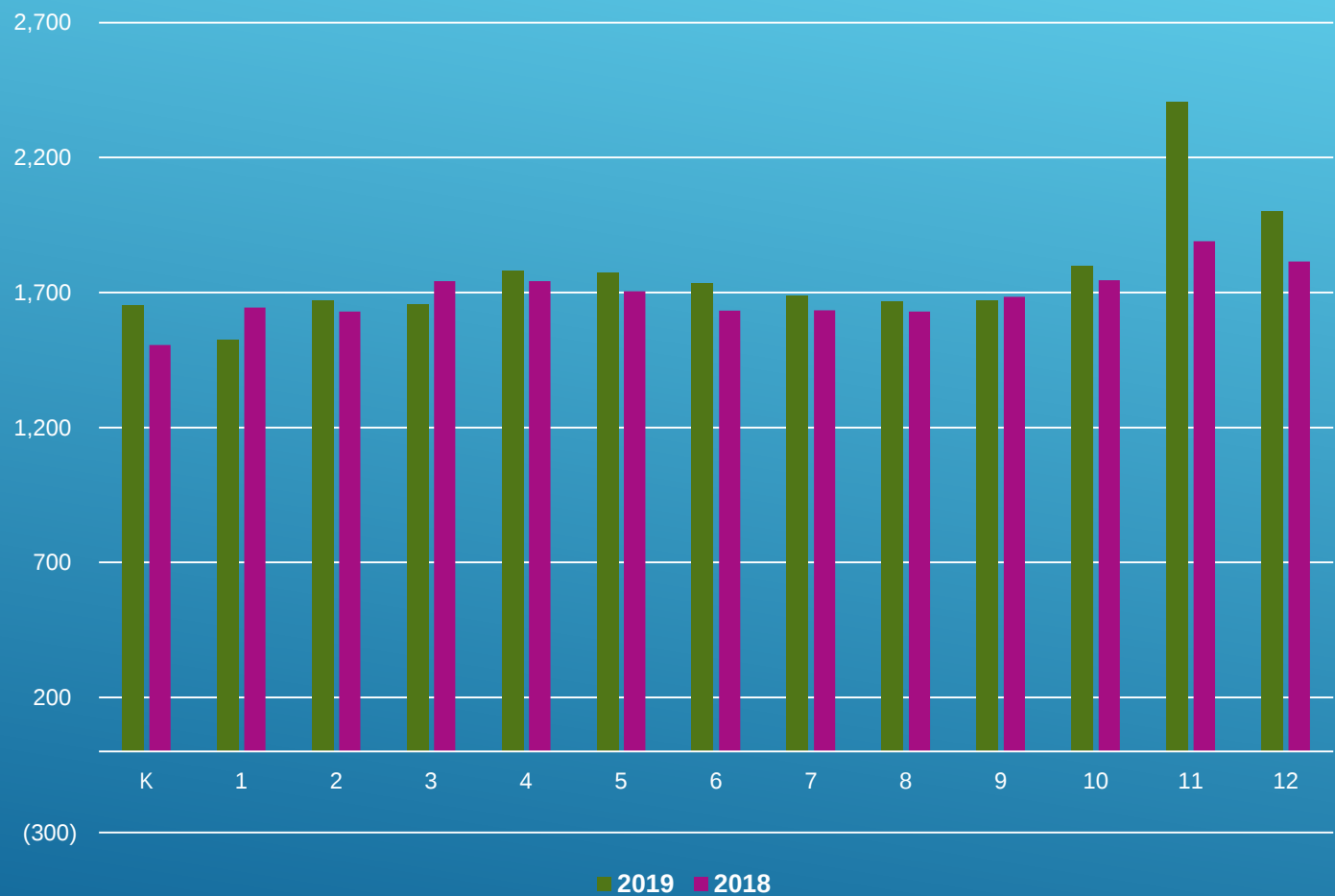


Sept 2018 Headcount = 23,194

Sept 2017 Headcount = 22,000

CENTRAL OKANAGAN PUBLIC SCHOOLS

GRADE DISTRIBUTION (HEADCOUNT)

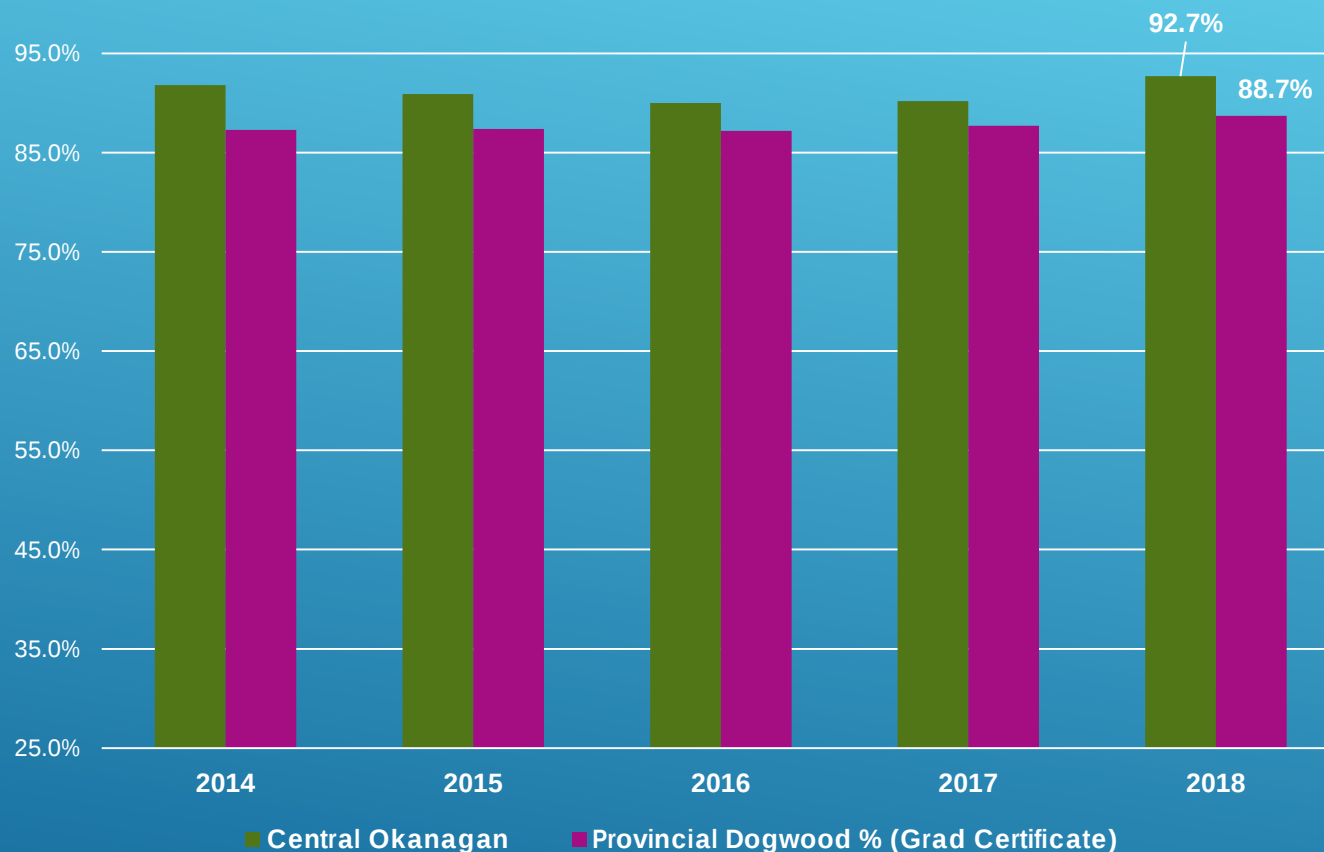


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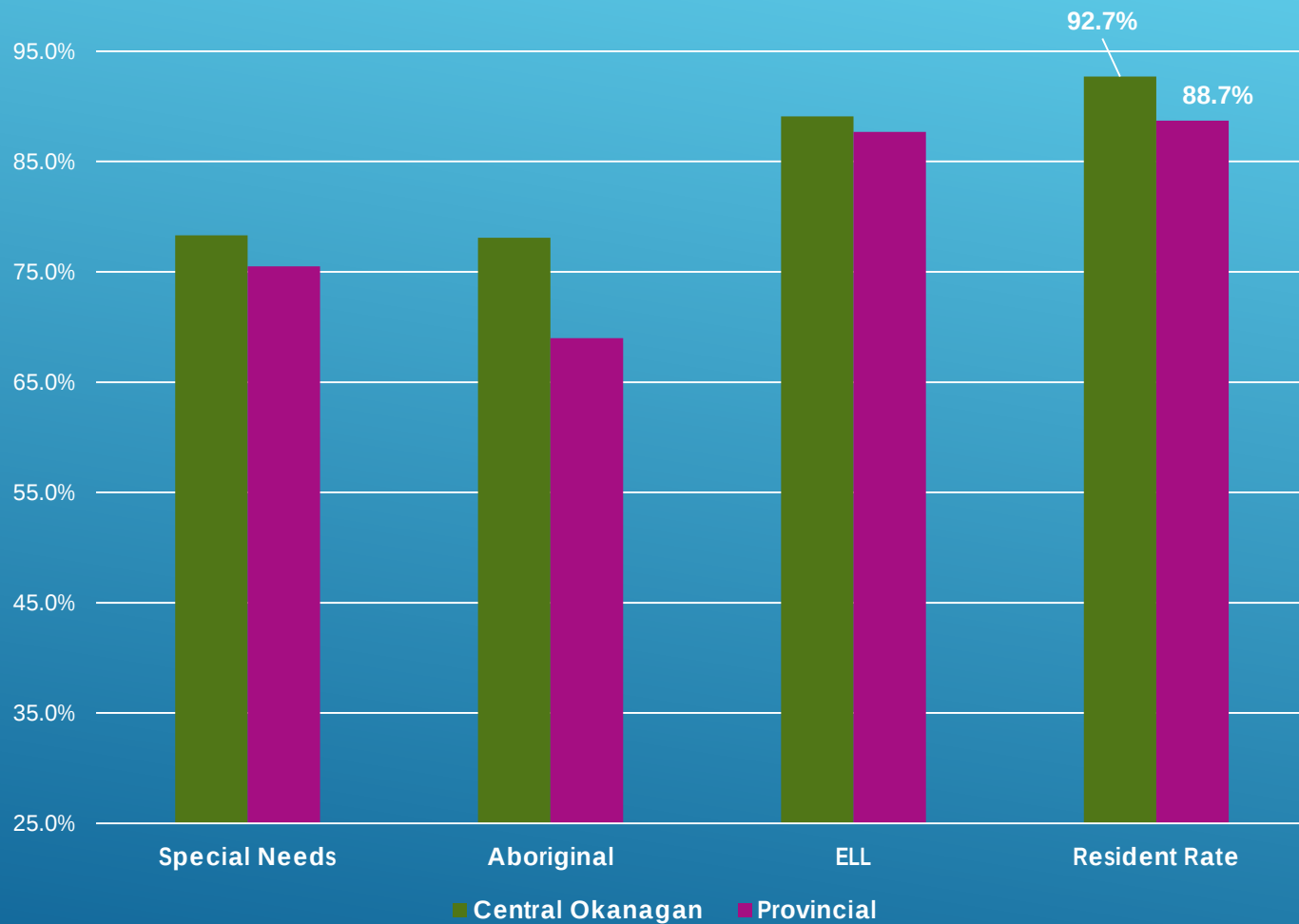
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SIX YEAR GRADUATION RATE FOR BC RESIDENTS BY YEAR



The Six-Year Dogwood Completion Rate was developed to help us estimate the percentage of British Columbia students entering Grade 8 who graduate with a BC Certificate of Graduation ("Dogwood") or BC Adult Graduation Diploma ("Adult Dogwood") within six years. While most students will complete high school within the expected five-year period, a number of students will take longer to complete their Dogwood (e.g., students who take a year off to play sports or study abroad; or those who require an additional year to successfully finish one or two required courses).

CENTRAL OKANAGAN PUBLIC SCHOOLS SIX YEAR GRADUATION RATE (2017/18) FOR BC RESIDENTS BY CATEGORY



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FINANCIAL INCOME SOURCES – FUNDING MODEL REVIEW

K-12 Public Education Funding Model Implementation

In early 2018, an Independent Panel conducted a review of the BC K-12 Public Education Funding Model to ensure the education system receives stable and predictable funding. The Panel's Funding Model Review report includes 22 recommendations in three key areas – equity, accountability, and financial management.

- [Read the Panel's Funding Model Review Report \(PDF\)](#)

Next Steps

In the next phase of renewing the Province's education funding model, working groups will be formed in January 2019 to engage further on the key areas and themes identified in the report.

In collaboration with the Implementation Advisory Committee, the working groups will assess the implications of the recommendations made by the Panel and determine strategies for how those recommendations can be best implemented.

The working groups will include representation from all education partners including teachers, parents, school administrators, support staff, trustees, superintendents, the First Nations, and inclusive education groups. The groups will report back in the fall of 2019.

No changes will be made to the existing funding model for the 2019-20 school year.

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FINANCIAL INCOME SOURCES – THREE FUNDS

OPERATING



SPECIAL
PURPOSE



CAPITAL



OPERATING – Main operating expenditures, this is the fund that the budget development decisions are for.

SPECIAL PURPOSE – Funding that is provided for a particular purpose. Examples include: Classroom Enhancement Fund, CommunityLINK, Annual Facilities Grant, School Generated Funds. Budget is much more straight forward as the expense must be related to the purpose of the funding.

CAPITAL – This fund includes the capital assets of the District (i.e. land, buildings, equipment, vehicles). A five year capital plan is approved by the Board of Education on an annual basis.

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FINANCIAL INCOME SOURCES – MINISTRY OF EDUCATION OPERATING GRANT FACTORS



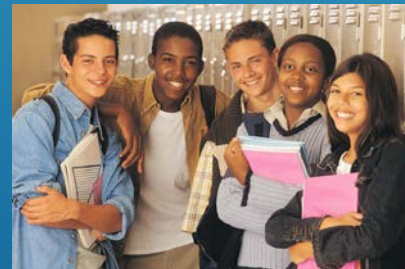
Majority of Operating Funding is generated by the # of school age FTE students. 2019 rate per student is **\$7,423** (2018 = \$7,301).

Adult education generates funding at a 2019 rate per adult student of **\$4,696** (2018 = \$4,618).



This year, the 2019 rate per student funded through Distributed Learning remained unchanged at **\$6,100**.

English language learners 2019 rate per student is **\$1,420** (2018 = \$1,395) per year.



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FINANCIAL INCOME SOURCES – MINISTRY OF EDUCATION OPERATING GRANT FACTORS



As well as school age funding, students with unique needs generate special needs funding. 2019 rates are:

LEVEL 1 = **\$38,800** (2018 = \$38,140)

LEVEL 2 = **\$19,400** (2018 = \$19,070)

LEVEL 3 = **\$9,800** (2018 = \$9,610)

Indigenous students generate funding at a 2019 rate of **\$1,230** per student (2018 = \$1,210).

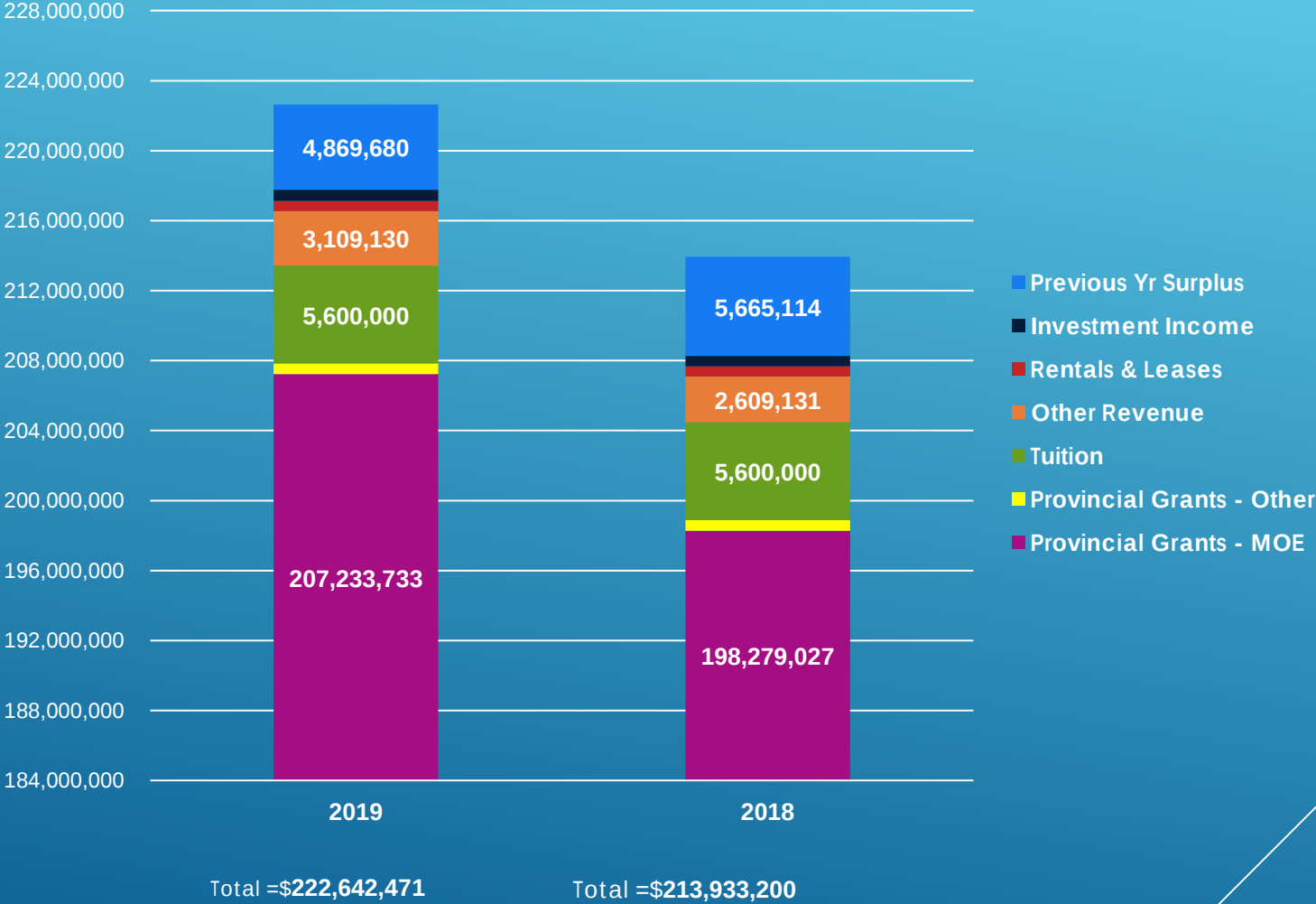


Other Sources of Funding includes:

- Salary Differential (teacher salary differential within province)
- Unique Geographic Factors (climate, dispersion, remoteness, small communities)
- Supplement Education Plan (assists vulnerable students & District Education plans)

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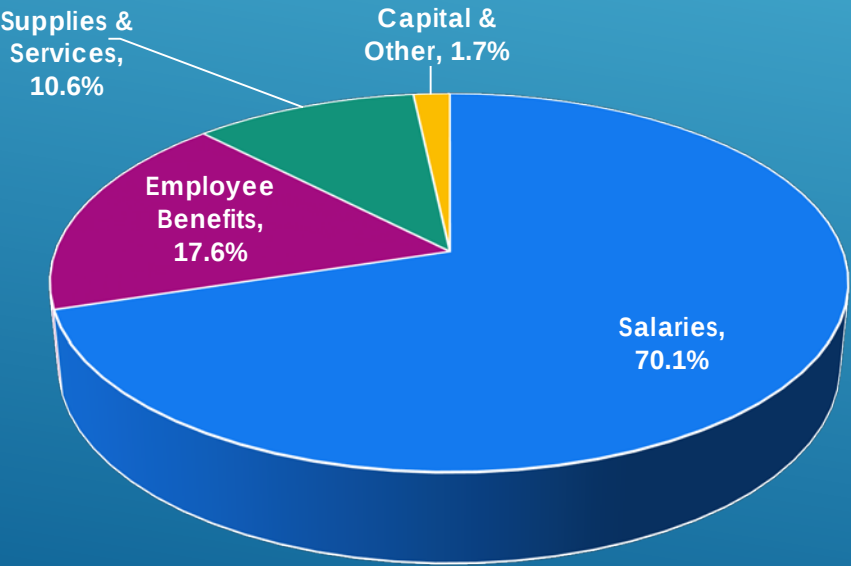
FINANCIAL INCOME SOURCES – REVENUE (OPERATING FUND)



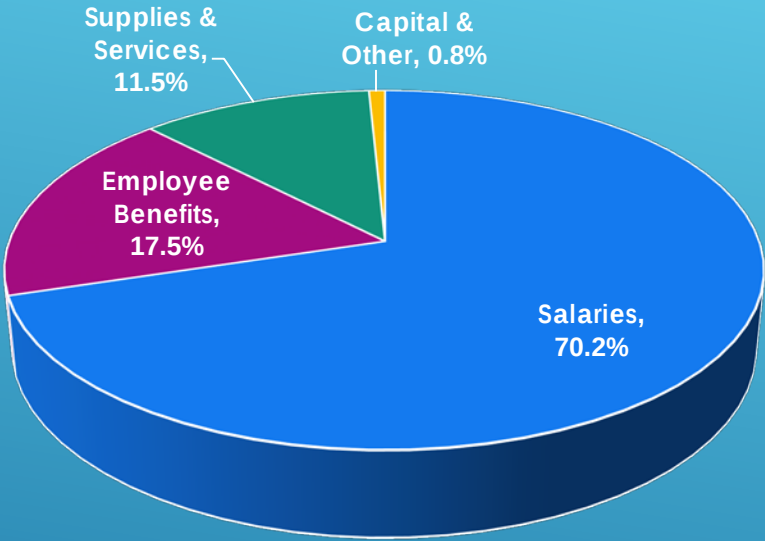
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FINANCIAL EXPENSE SOURCES – SPENDING BY TYPE

CENTRAL OKANAGAN



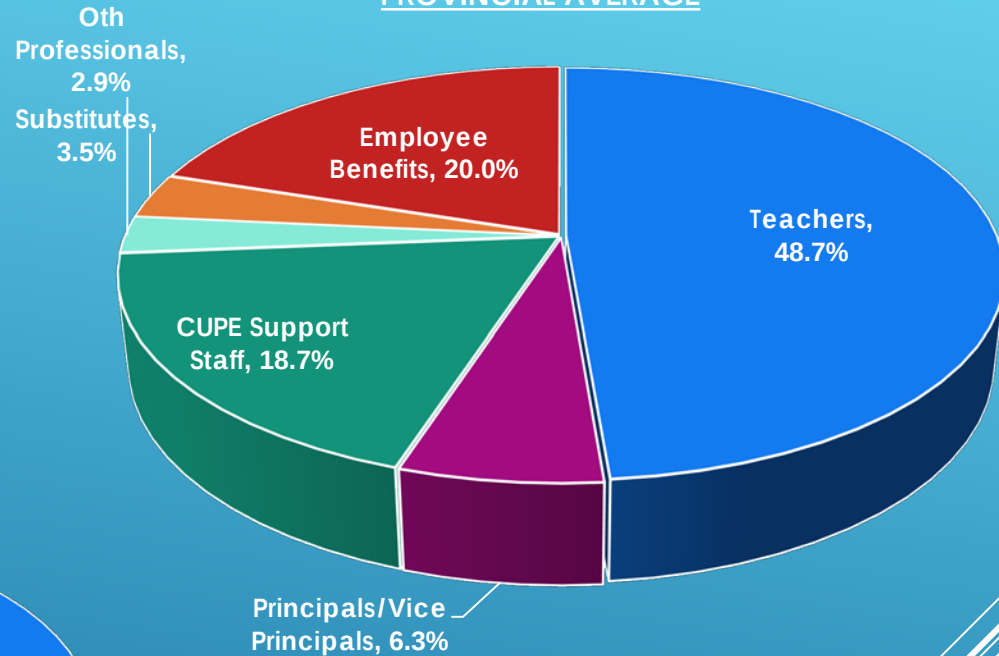
PROVINCIAL AVERAGE



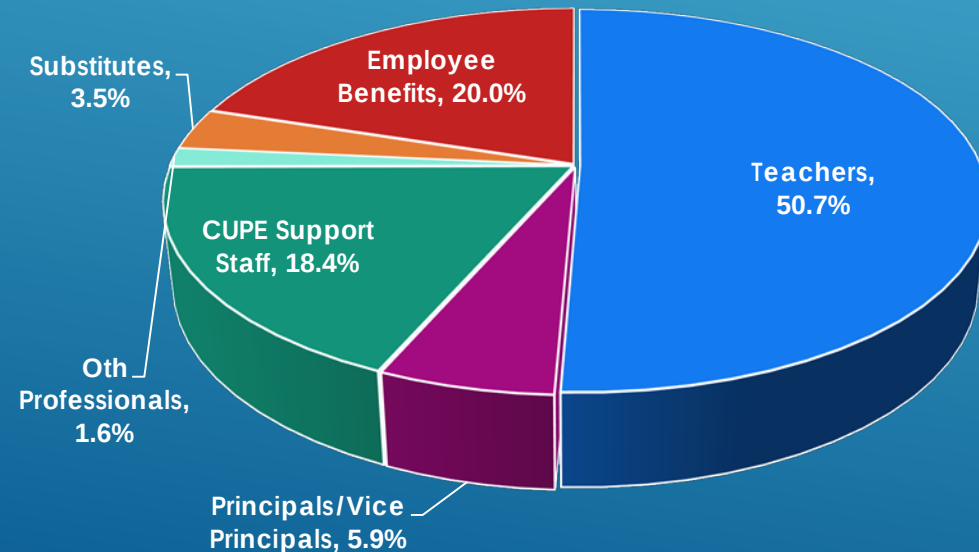
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FINANCIAL EXPENSE SOURCES – SPENDING BY EMPLOYEE GROUP

PROVINCIAL AVERAGE



CENTRAL OKANAGAN



CENTRAL OKANAGAN PUBLIC SCHOOLS

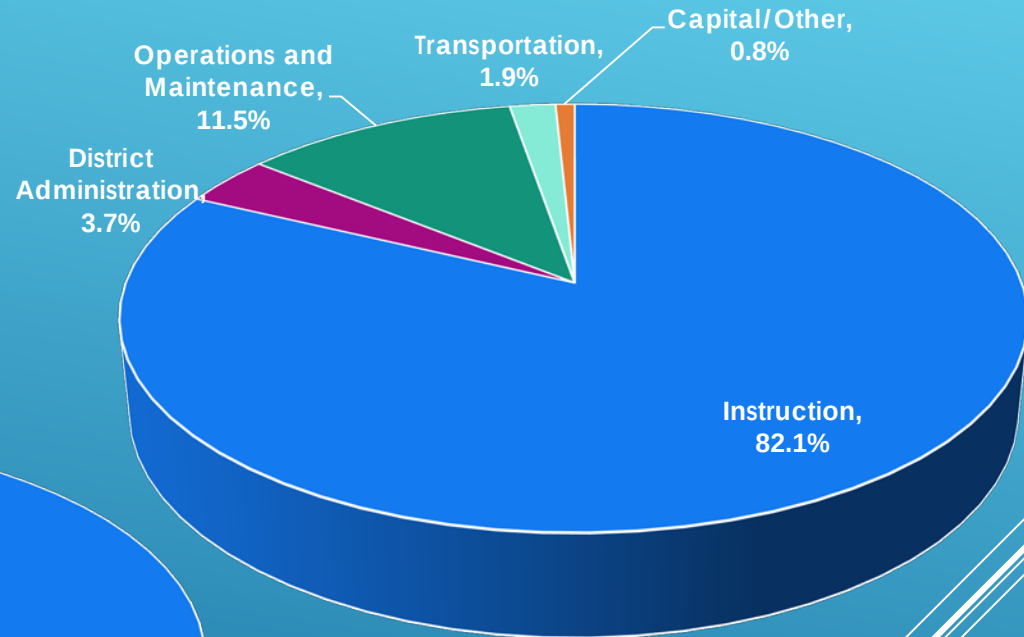
FINANCIAL EXPENSE SOURCES – STAFFING LEVELS (FTE) BY GROUP



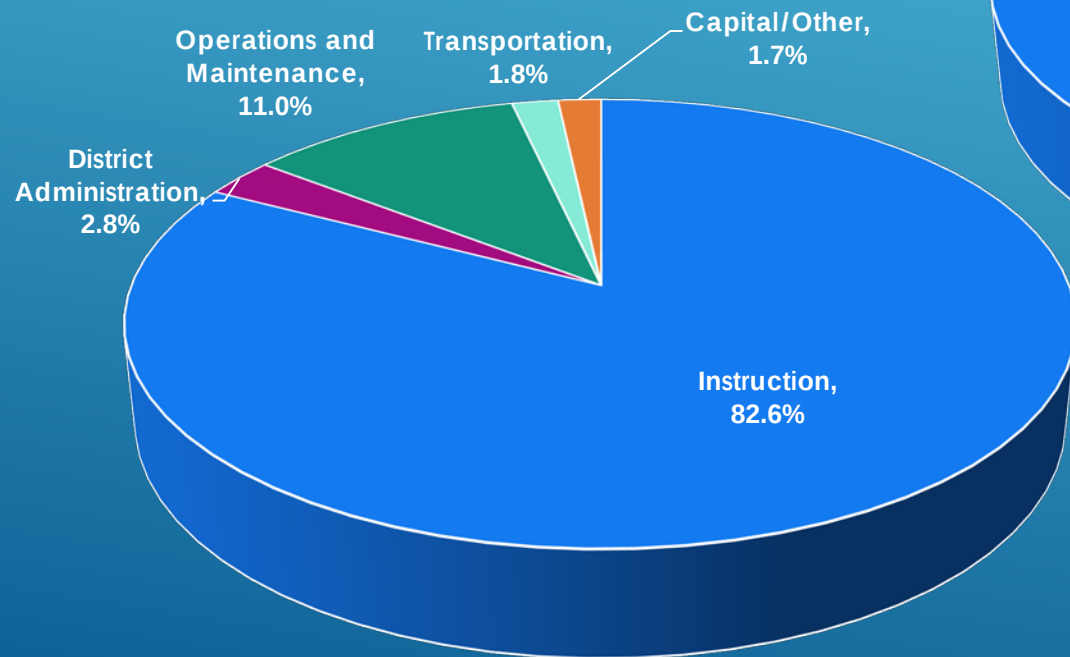
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FINANCIAL EXPENSE SOURCES – SPENDING BY PROGRAM

PROVINCIAL AVERAGE



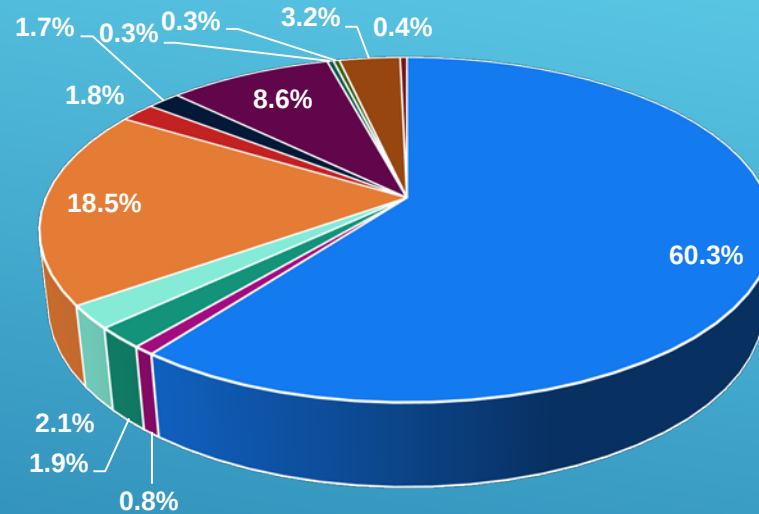
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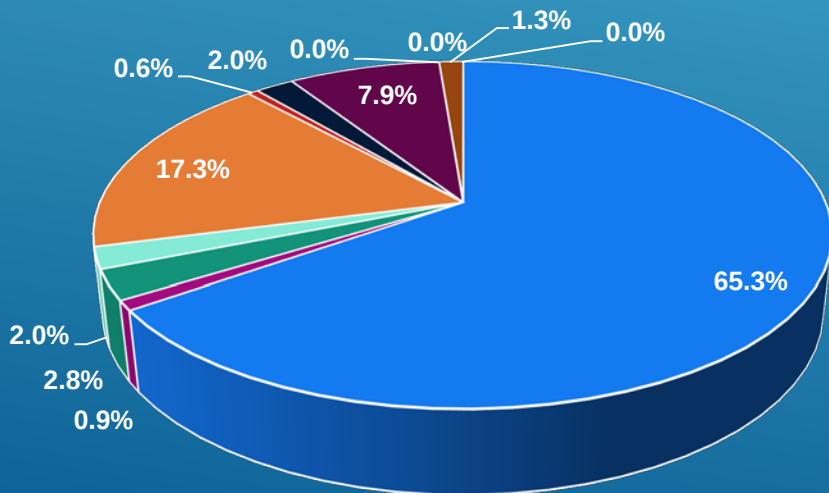
FINANCIAL EXPENSE SOURCES – SPENDING BY PROGRAM (INSTRUCTION)

PROVINCIAL AVERAGE



Regular Instruction	60.3%
Career Programs	0.8%
Library Services	1.9%
Counselling	2.1%
Special Education	18.5%
English Language Learning	1.8%
Aboriginal Education	1.7%
School Administration	8.6%
Summer School	0.3%
Continuing Education	0.3%
International & Out of Prov	3.2%
Other	0.4%

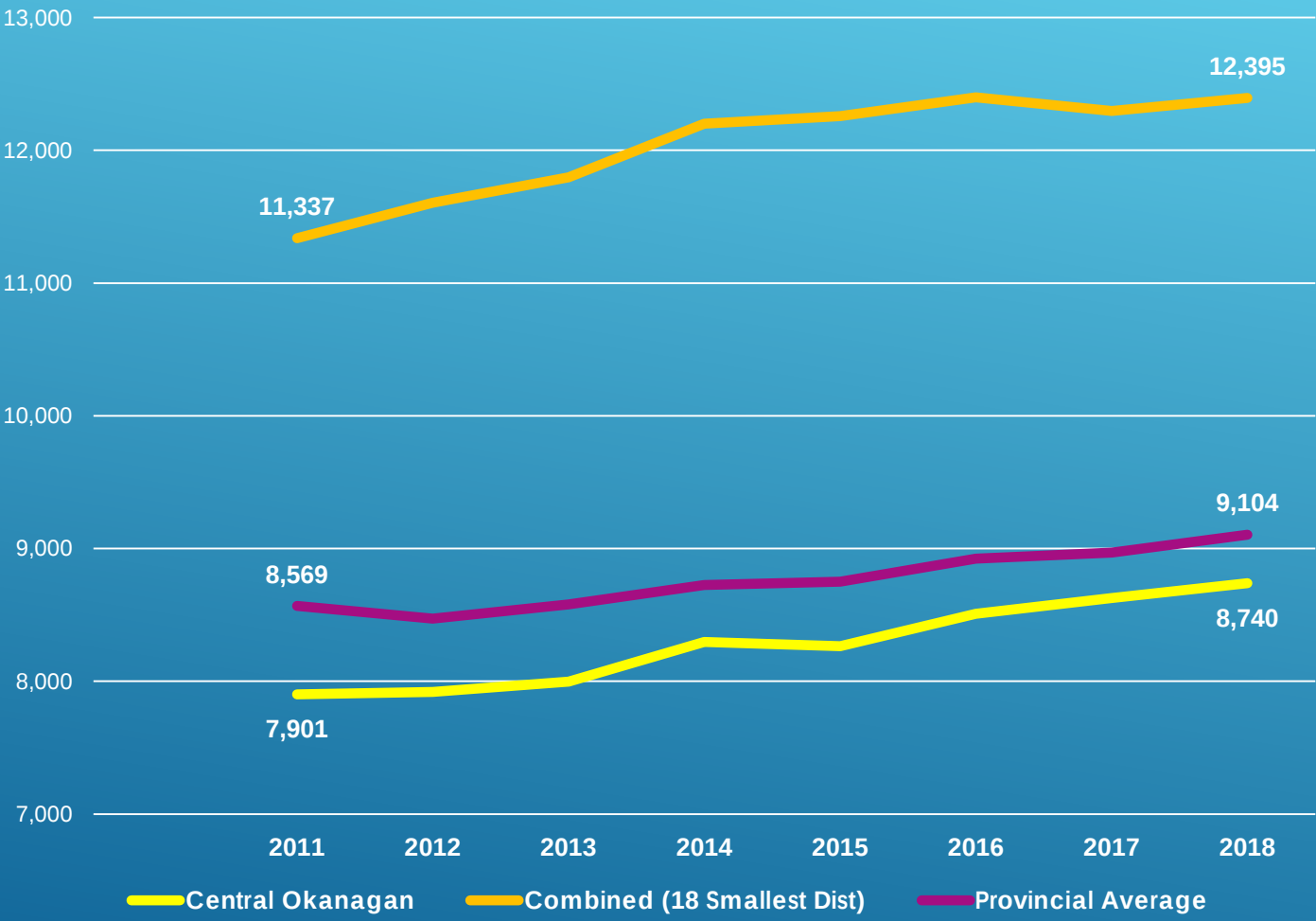
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Regular Instruction	65.3%
Career Programs	0.9%
Library Services	2.8%
Counselling	2.0%
Special Education	17.3%
English Language Learning	0.6%
Aboriginal Education	2.0%
School Administration	7.9%
Summer School	0.0%
Continuing Education	0.0%
International & Out of Prov	1.3%
Other	0.0%

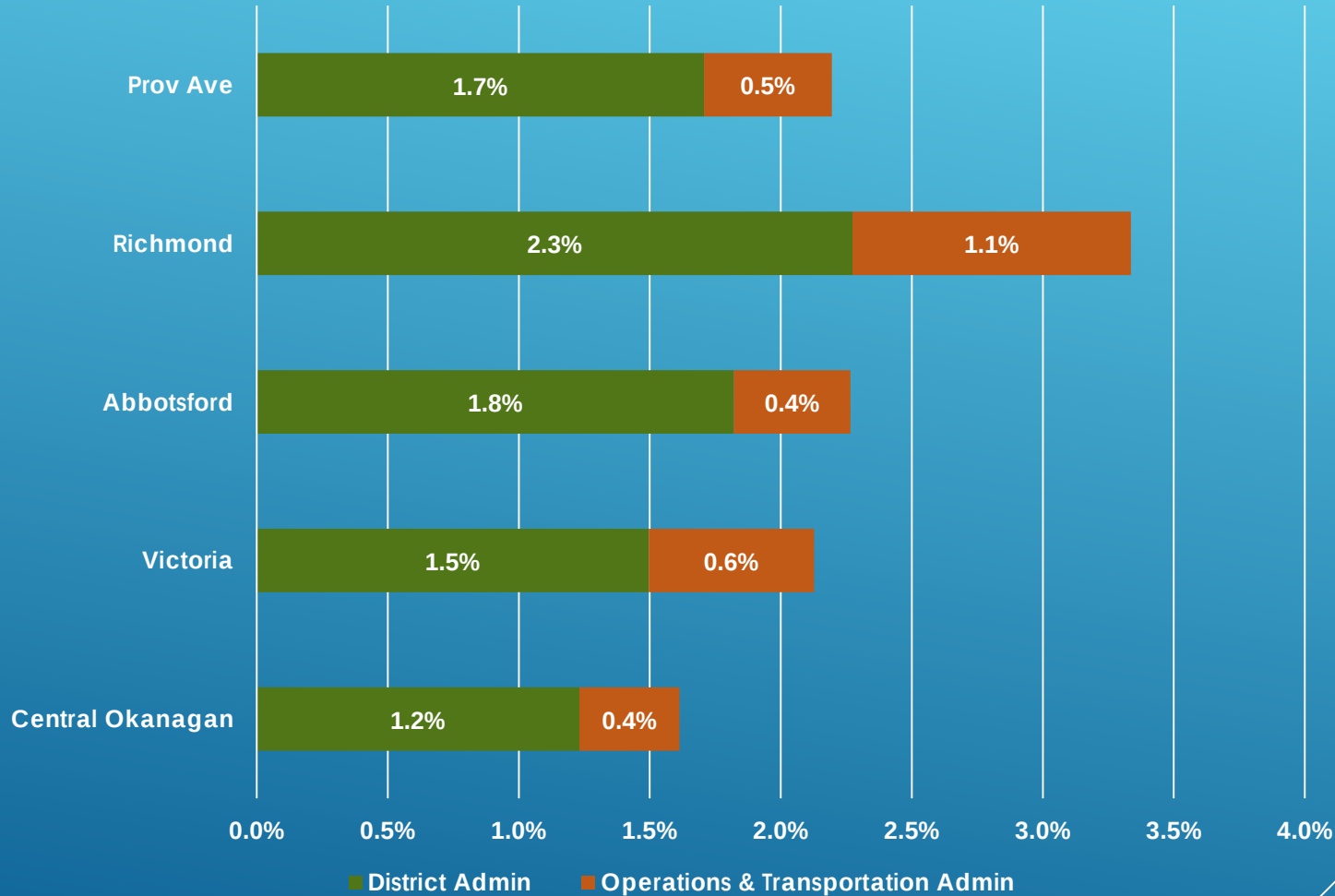
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FINANCIAL EXPENSE SOURCES – PER STUDENT FUNDING



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FINANCIAL EXPENSE SOURCES – 2017-18 ADMINISTRATIVE SPENDING OUTSIDE OF SCHOOLS



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CLASSROOM ENHANCEMENT FUND



- ▶ A new special purpose fund (Classroom Enhancement Fund) was established in the 2017/2018 school year as a result of the Supreme Court decision, to assist school districts with the implementation of the restored class size and composition limits;
- ▶ Our District expects to spend the full 2018/2019 budget of \$13.5M (\$12.9M on staffing, \$616K on overhead). In the prior year, the budget was \$12.8M (\$12.1M on staffing, \$782K on overhead);
- ▶ 146.9 full time teachers have been hired into our District, and are funded by the Classroom Enhancement Fund, since September 1, 2017.

CENTRAL OKANAGAN PUBLIC SCHOOLS

WHAT DO WE KNOW FOR NEXT YEAR



Projecting 150 additional FTE students next year

Increases expected to continue over the next 5-10 years

Current Capacity Utilization is at 105% (includes fee payers)

Birth rate continues to average around 1,644/year

Building permits in the Central Okanagan have seen a 293% growth since 2011

Per the 2016 Statistics Canada Census, growth in the Okanagan from intra-provincial migration (within BC) was 8% and an inter provincial migration (other provinces) of 4%.

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ASSUMPTIONS FOR 2019-2020



- Projecting 150 additional FTE students next year (growth to be fully funded);



- Staffing & operating needs for new middle school, Canyon Falls, including staffing, resources, busing, utilities etc.;
- Additional staffing costs due to projected enrolment increase and prep time changes;
- Effective January 1, 2019, WCB rate increased 12% & long term disability rate increased by 9.8%;
- Utilities increases ranging from 6% (electricity) to 10% (natural gas);
- Inflation on services and supplies of 2% (consistent with prior year);



- International Education enrolment level maintained at 400 FTE;
- Maintain current service levels and programs;
- 2019-20 funding formula allocations expected to remain consistent;

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ASSUMPTIONS FOR 2019/2020 – NET BUDGET POSITION

REVENUE

Enrolment Increase	\$ 1,113,450
Prep TEACH Funding	400,000
	<u><u>\$ 1,513,450</u></u>

EXPENSES

Canyon Falls Staffing & Overhead Costs	\$ 731,500
Increased Teacher Needs for Enrolment	622,770
Additional TEACH for Chg to Prep	415,180
Increased Resource Needs for Enrolment	52,500
NGN Savings	\$ (189,511)
Net Est Portable Needs (3 New & 9 Moves)	(195,000)
WCB Rate Increase	186,549
Long Term Disability Rate Increase	14,018
Teacher Pension Rate Recovery	(500,000)
MSP Premium Savings Recovery	(207,847)
General Inflation (S&S)	400,000
	<u><u>\$ 1,330,159</u></u>

NET BUDGET POSITION

NET BUDGET \$ 183,291

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2019-2020 BUDGET TIMELINE

4-Feb-19	7:00 pm, 2019-2020 Budget Presentation, HRES Room #3
20-Feb-19	4:00 pm, Finance Committee meeting, Submissions for consideration in Superintendent's Report
6-Mar-19	4:00 pm, Finance Committee meeting, Submissions for consideration in Superintendent's Report
15-Mar-19	2019/2020 Ministry of Education District Funding Announcement
3-Apr-19	4:00 pm, Finance Committee meeting, Superintendent Budget Proposal Report Presentation
17-Apr-19	4:00 pm, Finance Committee meeting, Superintendent Budget Report Presentation
24-Apr-19	6:00 pm, Board meeting, 2019-2020 Tentative Budget set
19-Jun-19	4:00 pm, Finance Committee meeting, review 2019-2020 Annual Budget Bylaw
26-Jun-19	6:00 pm, Board meeting, adopt 2019-2020 Annual Budget Bylaw

All Finance Committee & Board meetings are open to the Public. Public and Partner groups are welcome to make a presentation if desired.

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HOW TO PARTICIPATE

- Attend any or all public meetings (both Finance and Board);
- Provide feedback or ask questions at your school or board office;
- Provide feedback online (link can be found on the District website);



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QUESTIONS OR COMMENTS



Any questions can be emailed to Delta Carmichael
at Delta.Carmichael@sd23.bc.ca