



FINANCE AND AUDIT COMMITTEE PUBLIC MEETING AGENDA

**The Central Okanagan Board of Education acknowledges that this meeting is being held
on the Traditional Territory of the Okanagan People.**

DATE: Wednesday, November 20, 2019
TIME: 4:00 pm
LOCATION: School Board Office
1040 Hollywood Road S.
Kelowna, BC

1. AGENDA

Additions/Amendments/Deletions

2. REPORTS/MATTERS ARISING

2.1 Finance and Audit Committee Public Meeting Report – October 16, 2019
(Attachment)

3. PUBLIC QUESTION/COMMENT PERIOD

4. COMMITTEE MEMBERS QUERIES/COMMENTS

5. DISCUSSION/ACTION ITEMS

5.1 2019-2020 Budget Timeline and Budget Development Principles
(Attachment)

STAFF RECOMMENDATION:

THAT: The Finance and Audit Committee recommends to the Board:

**THAT: The Board of Education approve the 2019-2020 Budget Timeline as
presented at the November 20, 2019 Finance and Audit Committee Meeting.**

6. DISCUSSION/INFORMATION ITEMS

6.1 Financial Update – International Education Program
(Attachment)

6.2 Statement of Financial Information for June 30, 2019
(Attachment)

6.3 Funding Model Review Update
(Attachment)

7. COMMITTEE CORRESPONDENCE

8. ITEMS REQUIRING SPECIAL MENTION

**9. RECOMMENDATIONS/REFERRALS TO
THE BOARD/COORDINATING COMMITTEE/OTHER COMMITTEES**

10. ITEMS FOR FUTURE FINANCE AND AUDIT COMMITTEE MEETINGS

Future Public Finance and Audit Committee Meetings

- Rental Program Report (Profitability)
- Review of all Joint Use Agreements

September	October	November
- Presentation: Audited Financial Statements for the Fiscal Year - Audited Financial Statements for the Fiscal Year (<i>Action Item</i>)	- Financial Update at September 30th	- Budget Development Principles - School District No. 23 (Central Okanagan) Budget Development Timeline
January	February	April (1 st meeting)
- Amended Annual Budget for the Fiscal Year - Ministry Recalculation Allocation – School District No. 23 and Provincial - Financial Update at December 31st - Budget Survey development - Annual Review of Committee's Mandate, Purpose and Function	- Budget Presentation	- Overview of Budget Allocation - Budget Consultation Input Received - Trustee Indemnity for the 2019/2020 Fiscal Year
April (2 nd meeting)	May	June
- Central Okanagan School District Preliminary Budget Proposal – Superintendent's Budget Recommendations - Financial Report at March 31st	- Auditor's Report to the Finance and Audit Committee – Initial Communication on Audit Planning for the Year - Annual CommunityLINK Allocations - Financial Update – International Education Program	- School District No. 23 (Central Okanagan) Annual Budget for the Fiscal Year

11. FUTURE FINANCE AND AUDIT 2020 COMMITTEE MEETINGS

Future meetings will be determined by the Board of Education at the Public Board Meeting on November 27, 2019.

11. MEDIA QUESTIONS

12. ADJOURNMENT

CENTRAL OKANAGAN PUBLIC SCHOOLS – BOARD COMMITTEE REPORT

COMMITTEE: Finance and Audit Committee Meeting DATE: October 16, 2019

CHAIRPERSON: Trustee C. Cacchioni STAFF CONTACT: D. Carmichael, Assistant Secretary-Treasurer

*The Committee Chairperson acknowledged that the meeting was being held
on the Traditional Territory of the Okanagan People.*

In attendance:

Board of Education:

Trustee R. Cacchioni (Chairperson)
Trustee J. Fraser (Committee Member)
Trustee L. Tiede (Committee Member)
Trustee M. Baxter

In attendance:

Staff:

R. Stierman, Secretary-Treasurer/CFO
D. Carmichael, Assistant Secretary-Treasurer
V. Dougans, Finance Manager
M. DesRochers, Executive Assistant (*Recorder*)

Absent:

K. Kaardal, Superintendent of Schools/CEO
T. Beaudry, Deputy Superintendent of Schools

Partner Group Representation:

COTA Susan Bauhart, President
COPAC Cherylee Morrison, Co-President
COPVPA Mike Dornian, Treasurer
CUPE Dave Tether, President
DSC Sebastian Sharma, Grade 11 at Okanagan Mission Secondary
DSC Max Steinberg, Grad 10 at Okanagan Mission Secondary

Agenda/Additions/Amendments/Deletions

October 16, 2019 Agenda – approved as presented.

Reports/Matters Arising

September 18, 2019 Committee Report – received as presented.

Discussion/Action Items

1. Financial Update – September 30, 2019

The Assistant Secretary-Treasurer stated that, as per a recommendation from the Auditor General, staff are asked to report the District's forecasted results compared to the actual budget on a regular basis. The September 30th financial update outlines the revenue and expenditures for the first quarter. The Assistant Secretary-Treasurer highlighted that student enrolment was higher than expected (resulting in additional staffing) and the Amended Annual Budget has been adjusted accordingly. The transportation operating fund was also adjusted due to the additional routes being added to the system to accommodate eligible students. As of September 30, 2019, the District had 382 FTE International Education Program students, 394 FTE as of October 16th, and the budgeted 400 FTE is expected to be reached by June 30, 2020.

The Committee recommended that the following amendments to the Financial Update - September 30, 2019:

- Add asterisks at the bottom of the Operating Fund that say "The Majority of staff attached to instruction are paid over ten (10) months and the majority of staff attached to District Administration are paid over twelve (12) months".

In response to a query from the CUPE President, the Assistant Secretary-Treasurer stated that an analysis of all CUPE members hired over the past ten years will be provided at the November 20, 2019 Finance and Audit Committee Public Meeting.

Outcomes

The Committee received the Financial Update as of September 30, 2019 as amended at the October 16, 2019 Finance and Audit Committee Public Meeting and recommended that the amended update be forwarded to the Board of Education as an information item.

Items Requiring Special Mention

The COTA President queried if any updates have been received regarding the funding formula.

The Secretary-Treasurer/CFO stated that no updates on the funding formula have been received. The six working groups have submitted their reports and school districts are waiting for further information on the funding formula.

Trustee Baxter commented that a Ministry of Education Partner Liaison Meeting is being held on Friday, October 18, 2019. Board Chairs, Superintendents, and Secretary-Treasurers will be in attendance and the agenda indicates a presentation on the funding model implementation. The District is looking forward to hearing this presentation and will relay any updates, if appropriate.

Recommendations/Referrals to the Board/Coordinating Committee/Other Committees

Future Public Board Meeting:

- Financial Update – September 30, 2019 (Information Item)

Items for Future Finance and Audit Committee Meetings

Future Public Finance and Audit Committee Meetings

- Rental Program Report (Profitability)
- Review of all Joint Use Agreements

September	October	November
- Presentation: Audited Financial Statements for the Fiscal Year - Audited Financial Statements for the Fiscal Year (<i>Action Item</i>)	- Financial Update at September 30th - School Based Meals Program Update	- Budget Development Principles - School District No. 23 (Central Okanagan) Budget Development Timeline - Analysis of CUPE Members Hired Over the Past Ten Years
January	February	April (1st meeting)
- Amended Annual Budget for the Fiscal Year - Ministry Recalculation Allocation – School District No. 23 and Provincial - Financial Update at December 31st - Budget Survey development - Annual Review of Committee's Mandate, Purpose and Function	- Budget Presentation	- Overview of Budget Allocation - Budget Consultation Input Received - Trustee Indemnity for the 2019/2020 Fiscal Year
April (2nd meeting)	May	June
- Central Okanagan School District Preliminary Budget Proposal – Superintendent's Budget Recommendations - Financial Update at March 31st	- Auditor's Report to the Finance and Audit Committee – Initial Communication on Audit Planning for the Year - Annual CommunityLINK Allocations - Financial Update – International Education Program	- School District No. 23 (Central Okanagan) Annual Budget for the Fiscal Year

Meeting Schedule

November 20, 2019 at 4:00 pm

Questions – Please Contact:

Trustee Rolli Cacchioni, Chairperson

Phone: 250-765-3419

email: Rolli.Cacchioni@sd23.bc.ca

Delta Carmichael, Assistant Secretary-Treasurer

Phone: 250-470-3233

email: Delta.Carmichael@sd23.bc.ca

Rolli Cacchioni, Chairperson



Memorandum

Date: November 15, 2019
To: Finance and Audit Committee
From: Delta Carmichael, Assistant Secretary-Treasurer

Action: 2019-2020 Budget Timeline and Budget Development Principles

1.0 ISSUE STATEMENT

Approval of 2019-2020 Budget Timeline and Budget Development Principles.

2.0 RELEVANT BOARD MOTION/DIRECTION

None.

3.0 BACKGROUND

The Budget timeline is provided as a guide for the Board, staff and the public to use in the ongoing development of the budget. It outlines the significant dates and deadlines pertaining to both the amendments of the current year's budget as well as the development of next year's budget.

4.0 POINTS FOR CONSIDERATION

- a) The timeline (*Appendix A*) has been developed based on previous years schedules as well as anticipated proposed board meeting dates.
- b) There are a number of uncertainties facing the budget development in the 2019-2020 which may require alternate plans to be implemented either during the development process or after it has been completed. These uncertainties include:
 - Funding available (funding formula review);
 - Classroom Enhancement Funding confirmation;
 - Staffing requirements including availability of specialty teachers;
 - Space requirements;
 - Impact on student course schedules;
 - Impact on other employee staffing levels;
- c) The Budget Principles were developed a number of years ago and serve as a guideline when making budget decisions (*Appendix B*).
- d) The public finance presentation will take place in February 2020 as an information session for the public providing them with the most up to date information we have at that time.

5.0 OPTIONS FOR ACTION

Approve the 2019-2020 Budget Timeline and Budget Development Principles as presented.

6.0 SUPERINTENDENT'S COMMENTS

None.

7.0 STAFF RECOMMENDATIONS

THAT: The Finance and Audit Committee recommend to the Board of Education:

THAT: The Board of Education approve the 2019-2020 Budget Timeline as presented at the November 20, 2019 Finance and Audit Committee meeting.

8.0 APPENDICES

- A. 2019-2020 Budget Timeline
- B. 2019-2020 Budget Development Principles

Appendix A

Central Okanagan Public Schools				
Budget Development Timeline				
Fiscal Year Ending June 30, 2020				
Year	Date	Meeting	2019/2020 (Current Year)	2020/2021 (Next Year)
2019	Sept 18	Finance Committee	Review 2018/2019 Financial Statements	
	Sept 25	Board Meeting	Approve 2018/2019 Financial Statements	
	Sept 28		Forward 2018/2019 Financial Statements to Ministry	
	Nov 20	Finance Committee		Finalize Timeline/Discuss Consultation Process
2020	Jan 22	Finance Committee	Review 2019/2020 Amended Budget	Discussion of Budget Survey Questions / Presentation
(Proposed)				
	Feb 1			Provincial Funding Details / Request for Budget Input Begins
	Feb 3	Finance Presentation		7:00 pm HRES* (TBC)
	Feb 19	Finance Committee		Submissions From Partner Groups
	Feb 26	Board Meeting	Adopt 2019/2020 Amended Budget	
	Mar 1			2019/2020 Funding Details & Initial District Enrol Numbers Reviewed
	Mar 4	Finance Committee (if needed)		Submissions from Partner Groups
<i>March 16 - 27th, 2020 - SPRING BREAK</i>				
	Apr 1	Finance Committee		Superintendent/CEO Budget Report
	Apr 8	Board Meeting		Superintendent/CEO Budget Report (Information Item)
	Apr 15	Finance Committee		Superintendent/CEO Budget Report
	Apr 22	Board Meeting		Budget Recommendations / Tentative Budget Set
	May 20	Finance/Audit Committee	Preliminary Audit Planning Report	
	May 27			Final Day for Staff Adjustment / Teacher Layoff
	Jun 17	Finance Committee		Review 2020/2021 Budget
	Jun 24	Board Meeting		Adopt 2020/2021 Budget Bylaw
	Jun 30			2020/2021 Budget to Ministry
	Jun 30		Fiscal Year Complete	
<i>August 4 - 14, 2020 - YEAR END AUDIT</i>				
	Sept 16	Finance Committee	Review 2019/2020 Financial Statements	
	Sept 23	Board Meeting	Approve 2019/2020 Financial Statements	
	Sept 30		Forward 2019/2020 Financial Statements to Ministry	
* All Partner Groups and the general public will be invited to attend.				Page 3 of 4
Additional Budget Presentation/Information is available from the Assistant Secretary Treasurer upon request.				



Budget Development Principles

The underlying principles for all budget decision will be that:

- The student comes first.
- Every budget allocation will be aligned to meet the District's Mission, Vision and Values, and Goals. Consideration must also be given to the individual school goals.
- The District will obtain the most effective results for the dollars spent.
- The Board must meet legal requirements, therefore, the budget will be balanced and all statutory requirements will be met.



Memorandum

Date: November 15, 2019
To: Finance and Audit Committee
From: Delta Carmichael, Assistant Secretary-Treasurer
Prepared by: Dr. Rick Oliver, Assistant Superintendent
Information: **Financial Update – International Education Program**

1.0 BACKGROUND

The Board has requested information on the distribution of revenue from the International Education program on Central Okanagan Public Schools.

2.0 RELEVANT BOARD MOTION/DIRECTION

None.

3.0 INFORMATION STATEMENT

The International Education program continues to meet the mandate to generate revenue for the District with significant funds being utilized to support additional staffing, initiatives and programs within our District. Since inception, the International Education program has generated approximately \$23.5 million of net income to subsidize the District's operations.

Appendix A provides a 4 year report of the actual student FTE, total revenues, expenses and net income. It also illustrates the 13 year cumulative values that support the \$23.5 million of net income the International Education program has generated.

For the 2018/2019 school year, the program collected revenues of \$5,423,538, of which \$1,805,281 was required to operate the program. The remaining balance of \$3,618,257 was utilized to fund enhancements throughout the District including adding teachers to reduce class size, additional teaching time for support in our secondary schools and some discretionary funding for schools. With the revenue collected during the 2019 school year, the International Education program funded approximately 16 FTE CEAs and 24 FTE teachers in our system. *Appendix B* provides more detail.

The funding distributed to schools continues to enhance the student experience for all students including many of our most vulnerable.

- Secondary principals have asserted that the schools would not be able to offer the number of options and blocks, or the levels of support without the funding that is received through the International Education program.
- At middle and elementary schools, additional funds provide support, and/or create additional opportunities for field studies and activities for all students as funds are shared between schools and host classrooms.

Funding from the international program has also allowed the District to provide additional support for students with exceptional needs as well as those students and families who have recently arrived to Canada and our community.

We continue to see a significant number of students arriving in our District as a result of our ongoing marketing efforts. For the current year, the International Education program has 539 students registered for a total of 394 FTE and will easily reach the 400 FTE targeted for the year. Of this total, 438 students are new to the District and 101 are returning students from last year.

By design, Central Okanagan Public Schools continues to operate our International Education program as a mid-sized boutique program. This attracts students from many areas of the world. Students in our program represent 33 countries and jurisdictions for the 2019/2020 school year. This diversity supports the secondary objectives for the program of creating cultural awareness and enhancing diversity in our schools. This approach has provided a balance between generating funds and infusing culture into our District. Our approach is different than other similar sized districts where there is a heavy reliance on only 1 or 2 markets to create a large program. As shown in *Appendix B*, large programs do generate significant financial resources for those Districts.

4.0 STAFF COMMENTS

The Central Okanagan International Education Program continues to contribute financially to schools and the District, providing additional support and opportunities to all of our students. The balanced approach to the distribution of funds between schools and the district that has been adopted results in a very positive environment for local students with enhancements to opportunities and support. We continue to leverage the International Education program staff and services to support our schools and many of our most vulnerable students while continuing to operate a program that is highly regarded by international students and agents.

5.0 APPENDICES

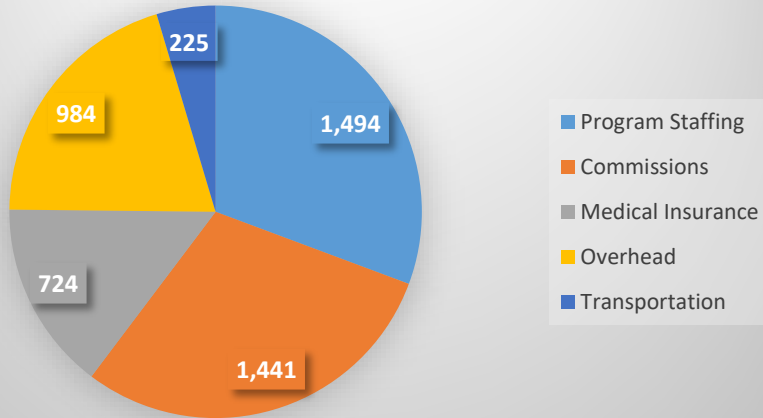
- A. Financial Summary of International Education Program
- B. Student Per Pupil Analysis (2019)
- C. District Funding Comparisons (2019)

APPENDIX A
Financial Summary of International Education Program

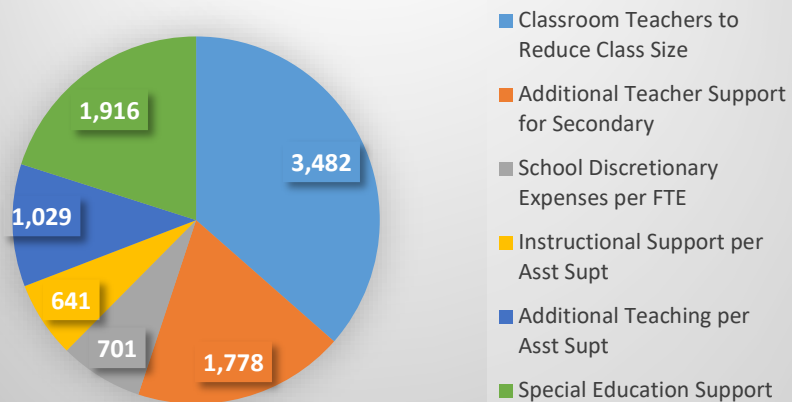
	Actuals				13 Year Cumulative
	2015-2016	2016-2017	2017-2018	2018-2019	
FTE	328	375	402	379	2749
Tuition	3,953,494	4,502,855	5,131,482	4,722,514	34,678,174
Application Fees	43,502	72,681	79,795	74,269	270,248
Homestay Application Fees	89,383	126,114	169,268	146,791	531,556
Student Insurance Fees	300,546	347,716	370,442	339,093	1,357,797
Optional Student Activity Fees	0	118,904	135,195	140,871	394,970
Total Revenue	4,386,925	5,168,270	5,886,182	5,423,538	37,232,745
Commissions	416,181	554,296	628,837	546,046	3,679,247
Recruitment	103,703	123,674	125,625	93,588	446,590
Services & Supplies	70,768	79,427	102,552	72,719	2,779,469
Student Activities	58,134	195,658	195,862	206,511	656,164
Student Insurance	237,123	279,691	285,004	274,566	1,076,383
Transportation (bussing)	62,481	74,249	61,341	45,790	243,861
Wages & Benefits	454,526	530,403	551,596	566,061	4,727,751
Total Expenses	1,402,915	1,837,398	1,950,817	1,805,281	13,609,465
Net Income	2,984,010	3,330,872	3,935,366	3,618,257	23,623,280

APPENDIX B Student Per Pupil Analysis

Total Required for Int'l Ed. Program (per FTE)



Total Enhancements from Int'l Ed. Program (per FTE)



	2019	
	Per FTE	Total
Program Staffing	1,494	566,061
Commissions	1,441	546,046
Medical Insurance	724	274,566
Overhead	984	372,818
Transportation	225	45,790
Total Required for Program	4,867	1,805,281

	Per FTE	Total
Classroom Teachers to Reduce Class Size	3,482	1,319,732
Additional Teacher Support for Secondary	1,778	673,727
School Discretionary Expenses per FTE	701	265,600
Instructional Support per Asst Supt	641	243,123
Additional Teaching per Asst Supt	1,029	390,000
Special Education Support	1,916	726,074
Total Enhancements from Program	9,547	3,618,256

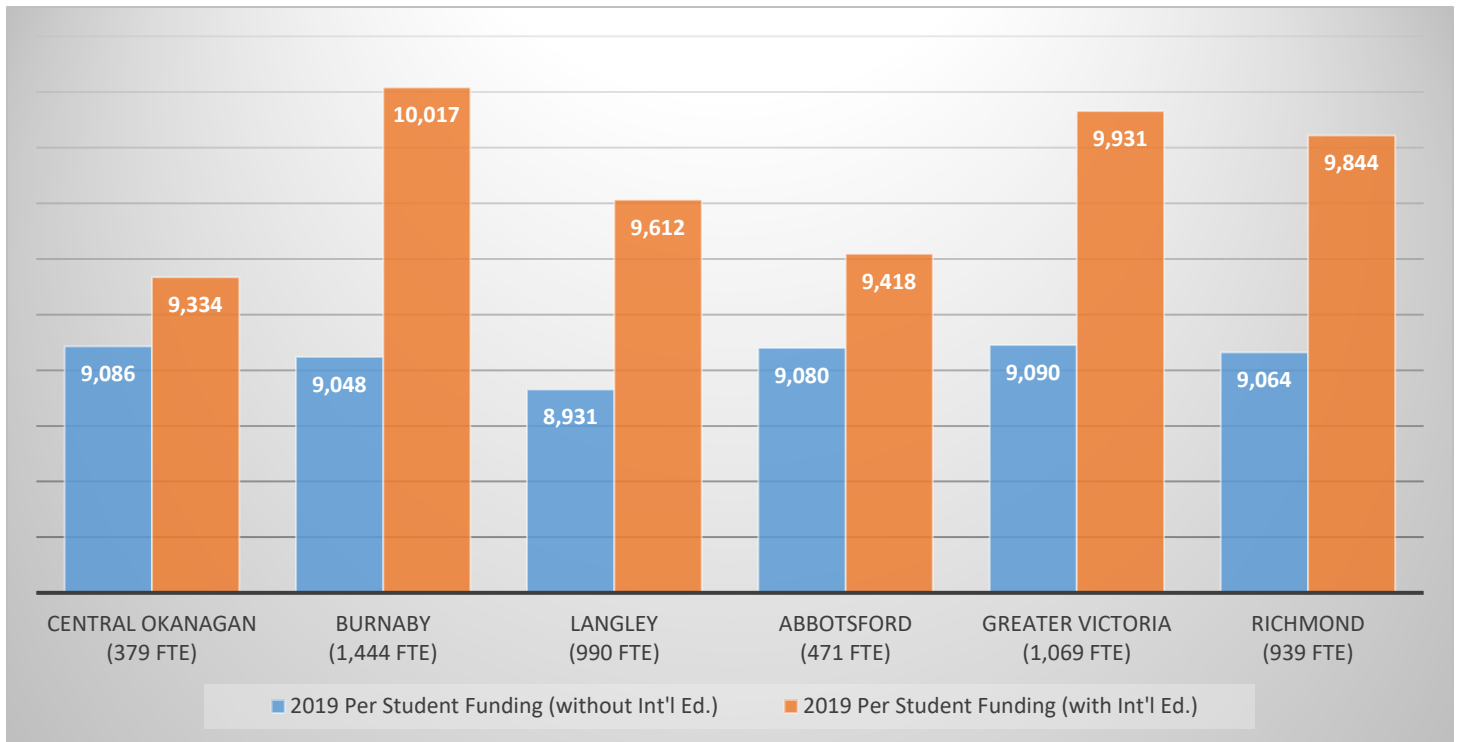
Total Average Fee Per Student FTE 14,414

Total Revenues Generated 5,423,538

The 2018/2019 annual student fees were set at \$14,500/year. This includes tuition, application and medical fees and where applicable, homestay placement fees.

APPENDIX C

District Funding Comparisons





Memorandum

Date: November 15, 2019
To: Finance and Audit Committee
From: Delta Carmichael, Assistant Secretary-Treasurer

Information: Statement of Financial Information for June 30, 2019

1.0 RELEVANT BOARD MOTION/DIRECTION

None.

2.0 BACKGROUND

Per the Financial Information Act, the District must prepare, on an annual basis, a Statement of Financial Information (SOFI). This statement must be filed with the Ministry of Education by December 31st of each year and must include a schedule showing:

- i. in respect of each employee earning more than a prescribed amount, the total remuneration paid to the employee and total amount paid for the employee's expenses, and
- ii. a consolidated total of all remuneration paid to all other employees.

3.0 INFORMATION STATEMENT

Once the audited financial statements have been finalized, the District prepares the SOFI report (Appendix A) and has several processes in place to capture the appropriate information to support this report. The full SOFI report is available on the District's website (Board of Education – Committees – Finance and Audit).

4.0 NEXT STEP

The Statement of Financial Information for June 30, 2019 will be brought forward to the next Board of Education meeting as an information item. The report will then be signed and forwarded to the Ministry of Education before the December 31, 2019 deadline.

5.0 APPENDIX

- A. Statement of Financial Information for the Year Ended June 30, 2019

The entire SOFI Report is posted
to the District's website:
(Board of Education –
Committees – Finance and Audit).



**Central Okanagan
Public Schools**

Together We Learn

STATEMENT OF FINANCIAL INFORMATION

For the Year Ending
June 30, 2019





Memorandum

Date: November 15, 2019
To: Finance and Audit Committee
From: Ryan Stierman, Secretary-Treasurer/CFO
Delta Carmichael, Assistant Secretary-Treasurer

Information: **Funding Model Review Update**

1.0 BACKGROUND

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 Independent Funding Model Review panel presented a final report on December 18, 2018 with 22 recommendations in three key areas – equity, accountability and financial management. Four Working Groups were established to assess the implications of the Panel's recommendations with the goal of identifying any challenges and providing suggestions. These four working groups include:

- Financial Management;
- Adult and Continuing Education;
- Inclusive Education;
- Online Learning.

See *Appendix A through D* for the working group reports.

2.0 RELEVANT BOARD MOTION/DIRECTION

Public Board Meeting - April 24, 2019

Main Motion 19P-058

THAT: The Board of Education approve the Central Okanagan Public Schools' summary report on the Funding Model Review Recommendations, as attached to the Agenda, and as presented at the April 24, 2019 Public Board Meeting.

3.0 INFORMATION STATEMENT

Financial Management (Appendix A)

The Financial Management Working Group Committee agrees with Recommendations 18, 19 and 20. In summary these recommendations include:

- Opportunity for sector partners and district stakeholders to consult in the formation of the annual provincial budget;

- The movement to a three-year budgeting and funding cycle for both the Ministry of Education and school districts to support broader transparency and assist districts in making informed and sustainable budgeting choices;
- Provide clear provincial policies on reserves and the utilization of these accumulated surpluses.

District staff supports the above comments from the committee. The opportunities for districts to consult on the formation of the annual provincial budget will provide the government with a better understanding of the challenges that districts are facing throughout the province.

The ability to budget with funding certainty for more than one year will allow districts to plan longer term, enabling better and more sustainable decisions that will benefit our students.

Lastly, clear guidelines on reserves would be beneficial as districts would have a better understanding of government expectations as it determines how to save for larger, long-term initiatives.

Adult and Continuing Education (Appendix B)

The Adult and Continuing Education Committee agreed with Recommendation 11. In summary this recommendation includes:

- Adult and continuing education continue to be funded on a course basis.

District staff supports the above comments from the committee as course basis funding reflects the nature of adult and continuing education, students not taking a full course load. District staff would also support a review of the differential between adult and school age student per pupil funding rate, as it also supports the committee's findings that a 50% differential is too high and does not accurately reflect the true cost of serving these students.

Inclusive Education (Appendix C)

Recommendation 6 recommends that the Province develop a single inclusive education supplement that incorporates the various allocations that support diverse needs. The Inclusive Education Committee brought forward the following considerations in developing a funding model to support inclusive education:

- Clear accountability and transparency on district procedures on assessment and the allocation of services and supports to students;
- Development of a new designation for complex needs that require high cost supports;
- Movement to a prevalence model instead of a per designation model;
- This prevalence model should be adaptable to reflect changing needs in districts;
- The audit procedures should be updated to reflect the new funding model.

District staff is concerned about the impact of this recommendation as shown in *Appendix E*, Central Okanagan Public Schools has the fastest growing designated student and students with an autism diagnosis population of any large British Columbia school district for the 5 years ending 2017/18.

In 2019/2020, special needs student designations now total 2,866 or 11.4% of the total population of the District and a 55.7% increase since the 2013/2014 school year. From 2013/2014 to 2019/2020, the autism designation has increased by 385 students to 700 students, this equates to a 82% increase. In the same period of time, special needs funding has only increased 26.6%. As a result, the Operating Fund top-up to support our special needs program has increased to \$11.4 million.

District staff is concerned that a prevalence model will not be responsive enough to reflect the significant growth that our District is experiencing as it will use historical and census data that is not necessarily updated in a timely manner. There is also a significant concern that the new prevalence model will continue to ignore increasing demands to ensure high incidence students are able to be successful, further increasing the amount of operating funding required to support our special needs program. An increase in the differential between funding and supports required will ultimately reduce services for all students.

Online Learning (Appendix D)

The Online Learning Committee provided the policy considerations that should be considered for Recommendation 10, Distance Learning. The committee also recommended that all methods of learning delivery should be funded equally.

District staff had no concerns with the recommendations of the committee and supports the concept that students throughout the province should be provided with equitable access to online education. However, if there is a shift to a Ministry developed policy and program delivery model, our concern is how this change will affect those districts with established programs and related staff. The District strongly supports a blended model of learning for Distributed Learning, providing both online and classroom support for these learners.

4.0 SECRETARY-TREASURER/CFO COMMENTS

There was no working group that considered Recommendation 9, which stated "The Ministry should base funding allocation for school-age educational programming on the number of students, rather than on the number of courses being taken. The Ministry should phase out the current course-based funding model by the 2020/2021 school year".

District staff is concerned about the impact a move to headcount funding for secondary schools could have on the District's overall budget. In the previous 5 years, the District received the following course load funding over and above what would have been provided in a head count only model:

Year	Additional FTE	\$ at 19/20 rates
2019/20	372.43	2,770,134
2018/19	395.60	2,942,473
2017/18	258.69	1,924,118
2016/17	312.75	2,326,235
2015/15	389.44	2,896,636

Should this funding be eliminated in the 2020/21 budget year, it would represent an estimated equivalent of removing 196 blocks of teaching time. District staff is concerned that this would have a significant impact on fine arts, dual credit, apprenticeship and low enrollment offerings. Reducing the variety of courses offered could impact graduation rates.

5.0 APPENDICES

- A. Financial Management Working Group Report
- B. Adult and Continuing Education Working Group Report
- C. Inclusive Education Working Group Report
- D. Online Learning Working Group Report
- E. Student Designation Analysis

FUNDING MODEL IMPLEMENTATION

Financial Management

WORKING GROUP REPORT

OCTOBER 4, 2019

Background

The Financial Management Working Group (FMWG) was responsible for reviewing and discussing Recommendations 18, 19 and 20 of the Independent Review Panel's (the Panel) report and considering how this work aligns with the recommendations identified by the Panel under the Accountability theme. As such, the FMWG approached this work with the following agreed-upon parameters:

1. The FMWG respected the co-governance relationship between the Ministry of Education and boards of education and their respective roles and responsibilities.
2. The FMWG focused on how best to ensure transparency and accountability for the overall funding provided for public education (quantum) and the spending of the funding provided to each district.
3. The provincial government is solely responsible for establishing the annual quantum to be invested in public education. The sector wants an opportunity to inform and influence provincial decisions and better understand the quantum that is approved and provided through the provincial budget, including what costs are covered and any service expectations. As provincial funding reflects between 57 and 99 percent of school district operating revenues, the service expectation should be clear to all partners in education.
4. The FMWG focused on how to simply and transparently explain local spending decisions and services that can be expected by staff, students and parents as well as how resources are allocated to support students in improving their learning outcomes (goals in school district strategic plans).
5. The FMWG will look at better ways to understand how operating and capital reserves are funded and managed over time. Recognizing that capacity for administrative planning and reporting requirements differs among school districts, the FMWG will look at opportunities for more support at the provincial level.

The FMWG's advice is based on a financial accountability framework that includes the following components:

1. The goals and objectives of the Framework for Enhancing Student Learning are clarified and should form the basis for planning and financial accountability for the sector.
2. The Ministry of Education establishes goals in its strategic plan which will align with service expectations established in consultation with the sector and inform the total amount of operating funding made available to boards of education. The description of the quantum of funding will provide transparency and clarity for all parties to understand the components of the approved amount.
3. School districts will establish strategic plans with key goals and objectives that support student learning and achievement, with action plans that specify how services will be resourced in support of the plans.
4. Funding will be allocated to districts in a manner that recognizes the differences in costs to provide an equitable level of service to students across the province.
5. School districts will budget with transparent reporting on key decisions and how resources are used to address the needs of students and classrooms, in alignment with the goals and objectives that support student learning (outlined in #3 above).
6. There will be regular monitoring of expenditures against budgets throughout the year. Year-end financial statements and reports will provide clarity for local parties on how funding was spent and what was accomplished, relative to the goals and action plans established at the start of the year.
7. Evaluation at both the provincial and local level will inform future strategic and budget plans.

A more detailed overview of these components and timelines is depicted in Appendix B.

Recommendations

Recommendation 18 – *The Ministry should identify net cost pressures and new program expenditures and, as part of the annual provincial budget process, bring them forward to Treasury Board for consideration when the total quantum of public education funding is being set.*

The FMWG agrees with this recommendation and provides the following advice for implementation.

The FMWG acknowledges that Government retains responsibility for establishing the quantum through the annual provincial budgeting process, however FMWG advises that there be greater transparency in the process to determine the final amount and accountability for the services funded.

The FMWG suggests that sector partners be given opportunities to provide information to Government prior to decisions being made as input into the annual provincial budget process. Annually, the sector will provide input to Government in advance of the annual provincial budget process and include the cost of sustaining services, the cost of implementing known new initiatives and any cost reductions or savings that may be realized by the sector.

The costing work will be coordinated through the BC Association of School Business Officials (BCASBO) who will report this information to Government by October 31 each year for the following three school years (see potential example of an Information Document for Government in Appendix C).

The Ministry will supplement this information by clearly identifying any changes in provincial and local trends as identified by the data used to calculate components of the funding distribution model. Specifically, the Ministry will ensure that any changes to data that have cost implications, such as increasing numbers of students with health and mental health needs, children and youth in care and children acquiring language skills are considered. As well, geographic data, such as school size and capacity or weather conditions, is also communicated annually to Government for consideration when establishing the amount of funds to be invested in K-12 education.

Individual school districts, partner associations and other stakeholders can also provide input into funding and services for public education through established channels such as association submissions, ongoing liaison with the Ministry, meeting with local Members of the Legislative Assembly (MLA)s and presentations to the Select Standing Committee on the Finance and Government Services.

Once the provincial budget is approved, Ministry staff will translate it into school year components and be transparent with all sector partners on the funding included in the quantum. The Ministry should ensure a consistent process and format annually for sharing this information.

This implementation advice is supported by research and partner submissions:

- Forecasts and projections of future resource needs can be used by different entities across the budgeting process to ensure the education system's long-term fiscal sustainability and develop clear implementation paths for educational reforms (OECD, 2017).
- The effective planning of education funding strategies and reform initiatives requires not only the identification of future resource needs, but also the systematic mobilization of knowledge generated through research, programme evaluations, monitoring and audit activities (Fazekas and Burns, 2012).
- Strategic thinking and long-term planning are central to the successful governance of complex education systems (Burns, Köster and Fuster, 2016).

Recommendation 19 – *To support multi year financial planning:*

- *Government should issue three-year operating funding to boards of education, based on available funding and projected student enrolment; and*
- *School districts should be required to develop three-year financial plans.*

The FMWG agrees with this recommendation and provides the following advice for implementation.

Although the FMWG supports multi-year planning, the group notes the importance of clarifying and disclosing assumptions and risks involved in making financial projections over multiple years. The longer the planning horizon, the less accurate the projections. The FMWG envisions a three-year rolling cycle updated for the current and future two years.

To improve planning, Government should clearly announce what factors will be addressed in determining the annual quantum, such as regular enrolment, enrolment in higher cost programs, provincially approved labour settlements and government-imposed costs. The tool to estimate funding at a district level should be retained to assist in more accurate planning.

Three-year planning components should include simple schedules and background descriptions for regular operating costs, accumulated operating reserves and local capital (see Appendix D).

To support broader transparency, in addition to budget information currently provided, districts would be required to publicly provide a simple one-to two-page budget summary document for the annual budget which would outline key spending decisions and assumptions made for multi-year planning, as well as relevant risks to the plan (e.g., sensitivity analysis, see Appendices D and E).

The preparation of multi-year education budgets will assist districts in making informed and sustainable budgeting choices.

Recommendation 20 – *The Ministry should establish clear provincial policies on reserves to ensure consistent and transparent reporting while maintaining school districts' ability to establish reserves. Specifically, the Ministry should:*

- *Set clear provincial policies on what school districts may save for, directly related to their strategic plans;*
- *Establish acceptable provincial range for unrestricted reserves, encompassing accumulated operating surpluses and local capital, which should be monitored and reported on (if required);*
- *Ensure that school districts have specific plans attached to each item or initiative when setting reserves and provide clear reporting on how the funds were spent; and*
- *Work with school districts to transfer any overages beyond the approved threshold into a fund at the school district level, to be accessed only with Ministry approval.*

The ability to accumulate operating surpluses over time allows districts to more effectively spend their grants without the risk of losing unspent annual funding at fiscal year end and allows districts to address unplanned expenditures and longer-term needs and costs. Local capital reserves provide funding that facilitates longer-term planning for costs without a dedicated funding source, such as technology and equipment.

Historically, local capital reserves fund the purchase of capital items (e.g., vehicles) and other local capital requirements not included in the capital plan, such as administrative facilities. Currently, local capital reserves often cover capital purchases to accommodate enrolment growth purchases (e.g., portable classrooms) and can contribute to major capital projects. The local capital reserve accounts for capitalized asset purchases, even if funded from operating grants, have accounting rules that require districts to transfer operating funding to local capital and record these items as purchased from local capital.

The FMWG agrees that greater transparency is needed around operating reserves. Transparency is especially needed to understand the restricted portion, including why funds are being restricted, how these restricted funds are intended to be spent and how they are actually utilized (must be updated annually as part of the district budget process to capture new additions or adjusted plans to fully spend over time). Improved transparency will better inform discussions about the amount of funding required for capital and operating budgets to meet strategic plans and deliver services for students.

To drive consistency, the FMWG supports a provincial reserve policy in which the Ministry specifies the factors to include and provides a standard reporting template aligned to a three-year planning cycle to be provided as part of the annual budget instructions (see Appendix D). The policy must provide clarity and consistency across districts on restricted items. The policy must also ensure reporting on the spending from reserves and prioritize spending on the goals outlined in strategic plans for improving student achievement. Enhanced reporting will improve transparency on how the reserve was accumulated, the initial spending plan and whether the plan was met.

Once consistent restriction categories and simplified reporting is established, the unrestricted portion of the accumulated reserve – as reported in the audited financial statement – is expected to range from one to four percent. School districts whose unrestricted balances surpass four percent should provide the Ministry with a detailed plan to use the excess funds within the three-year planning window and a quarterly report on how actual spending compares to their plan. This will ensure that all districts strive to be within the expected range and there is Ministry monitoring as recommended by the Panel. This process would have similar expectations to the Ministry monitoring of districts in deficit. Districts should also have a plan to maintain an unrestricted reserve balance should it fall below one percent.

Local capital transfers from operating for the purchase of capitalized assets must be clearly identified in the three-year plan (see Appendix D).

With good financial planning and monitoring, districts can be more accountable for effectively spending their operating grants, avoiding a deficit position and planning for any reserves. There is an expectation of sustainable services for students over the planning period. Greater transparency in the planned use of reserves will also assist the sector in more appropriately identifying whether any operating funding is available for funding major capital projects.

The FMWG discussed Recommendation 22 and agrees that operating funding should be used for operating and minor capital items and government should fully fund capital plan program expenditures.

This implementation advice is supported by the OECD results of their study, *The Funding of School Education – Connecting Resources and Learning* (2017):

- More flexibility in the budget planning and execution process can serve to increase its responsiveness to unforeseen circumstances and changing priorities as well as provide incentives for the more efficient use of school funding at the planning stage.
- The planning of education budgets should also be flexible enough to respond to new priorities and unforeseen circumstances, as well as providing incentives for efficiency, for example through the transparent regulation of carry-over rights for unspent resources.
- Relaxing central input controls and increasing budget flexibility has been a common strategy to enable education authorities to pursue their objectives more efficiently and effectively.

Accountability Recommendations of the Panel

The FMWG reviewed the Independent Review Panel's accountability recommendations and noted the need for strong alignment with the recommendations on financial management.

Accountability mechanisms will be driven by the Ministry's *Framework for Enhancing Student Learning*, which requires boards of education to develop multi-year strategic plans for school districts and individual schools. Strategic plans will focus on improving educational outcomes for all students, as well as promoting equity for Indigenous students, children in care and students with diverse abilities or disabilities. Flowing from strategic plans, boards of education will develop aligned service and financial plans to resource and operationalize key goals and objectives.

To support strategic planning, the FMWG determined that the sector will benefit from a guidebook that provides resources, advice and best practices on financial planning and reporting. A comprehensive and accessible single-source resource document will improve consistency across districts; transparent reporting for parents, staff and community; and ensure government understands the financial plans and fiscal position of school districts. The Ministry will need to engage a knowledgeable group of individuals from the sector to assist in developing the guidebook.

The guidebook would need to be supplemental to the technical Operating Fund Account Descriptions, Budget Instructions, Financial Statement instructions, Capital Planning Instructions and Operating Funding Manual as an additional technical resource for secretary-treasurers and their staff that are supporting boards of education around the stewardship of public resources. The guidebook should accompany clear policy direction from the Ministry on provincial reporting and local policy requirements for boards of education and should not be overly prescriptive but provide helpful advice to boards of education and senior staff to ensure good financial practices and procedures.

While considering the accountability recommendations, the FMWG concluded that there needs to be a balance between increasing administrative burden on school district staff and implementing the accountability framework and improving transparency. The FMWG noted that not all school districts have the same level of planning and reporting capacity. It is important that the Ministry streamlines or reduces existing reporting requirements when adding new requirements in response to the Panel's recommendations.

Accountability Recommendations 14 and 16 are also supported by the FMWG. The group commented that providing an annual report may not be possible along with financial statements due to availability of student data at that point in time, and so may need to come slightly later in the year. The implementation of this advice should be accompanied by professional development for the sector to build capacity of school district staff on an ongoing basis.

Conclusion

The FMWG appreciated the opportunity to review the Panel's financial accountability recommendations for public education. Implementation advice is intended to support accountability and transparency while considering capacity and workload expectations for school districts. There should be common understanding of the spending decisions of boards of education and a framework to align strategic goals for improving student outcomes with local spending. This report seeks to provide a framework with clear roles and responsibilities and more transparent reporting of the financial decisions made by the Province and local boards of education. As well, district staff should be supported with a guidebook to help build capacity and support consistent planning and reporting efforts across the province.

Indicators of success will include the following:

- More clarity for funding of operating and capital expenses both at the provincial and local level
- More local engagement on finances and financial information
- Planning and financial decisions that are aligned and focused on student achievement
- Enhanced understanding of school district reserves
- Better understanding of variance between forecast to actual spending

The FMWG is available to answer any questions on this report and is hopeful that the Minister of Education will consider this advice for improving financial accountability.

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Appendix A: Working Group Membership and Meeting Dates

Membership:

Name	Organization
Kim Horn (co-chair)	Ministry of Education
Joan Axford (co-chair)	Implementation Coordination Committee
Greg Frank	BC Association of School Business Officials
Cam McIntyre	BC Association of School Business Officials
Andrea Sinclair	BC Confederation of Parent Advisory Councils
Scott Sieben	BC Principals' & Vice-Principals' Association
Christine Perkins	BC School Superintendents Association
Mike Murray	BC School Trustees Association
Michal Rozworski	BC Teachers' Federation
Rob Zver	Canadian Union of Public Employees - BC
Jan Haugen	First Nations Education Steering Committee
Keith Miller	First Nations Education Steering Committee
Archie Johnston	Independent Advisor
Paul Lewkowich	Office of the Auditor General
Lawrence Tarasoff	Rural Education Advisory Committee
Ian Aaron	Ministry of Education

FMI Secretariat Support:

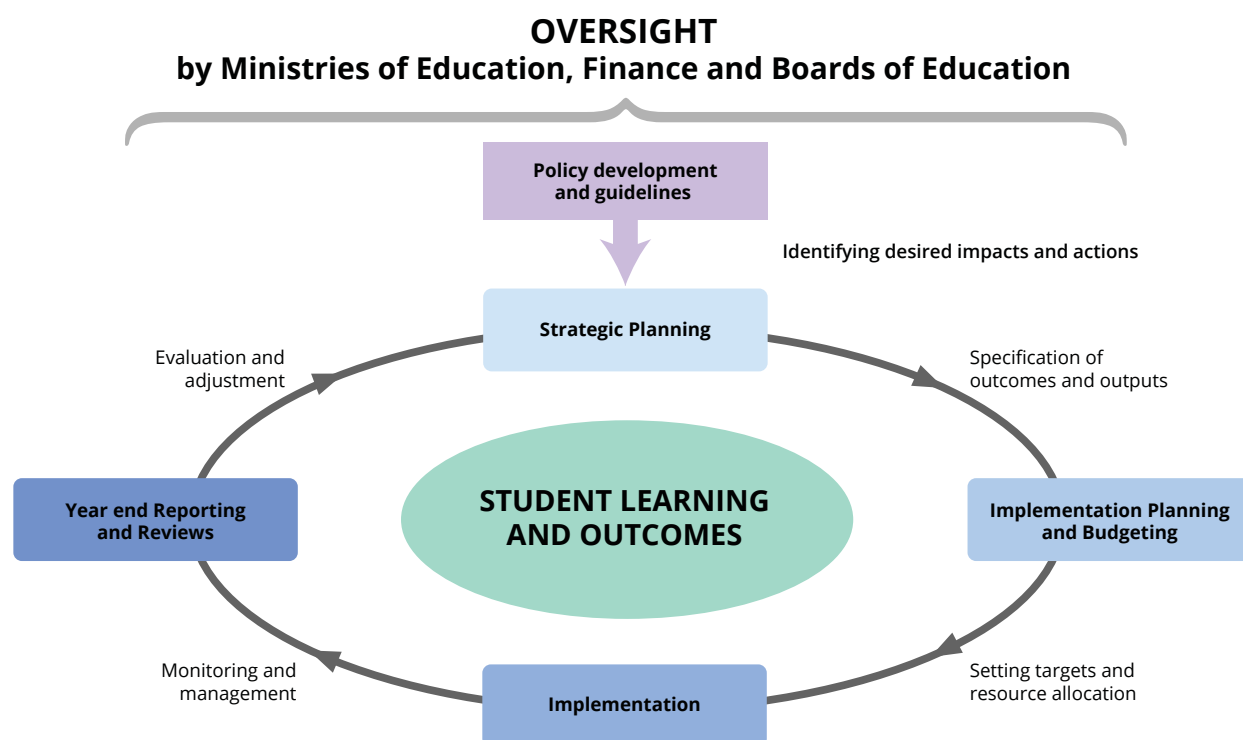
Alisha Olson	Ministry of Education
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Meetings:

- March 5, 2019 – Victoria
- April 2, 2019 – Victoria
- April 30, 2019 – Victoria
- May 28, 2019 – Victoria
- June 25, 2019 – Victoria

Appendix B: The Financial Accountability Components and Timelines

The proposed framework for financial accountability can be depicted as:



Timelines

- **Fall** – BCASBO provides cost and enrolment information to the province.
 - Ministry of Education updates its strategic plan goals and objectives in consultation with the sector and shares with school districts
 - Ministry prepares any budget documents for the Ministry of Finance and Treasury Board
 - Ministry reviews their policy documents for funding and financial budgeting and reporting and amends if required
- **December** - Amended funding for the current school year provides updated information to the province on the funding required.
- **February** - Provincial budget announced along with an information sheet on school year funding and commitments for the three-year plan (enrolment and compensation changes will be funded, etc.).
- **March** - Funding allocations to school districts for the following school year and budget instructions.
- **April - July** - School districts set their budget objectives in alignment with their strategic plan, approve and submit budgets. School district financial audits take place.
- **September** - School district financial statements that summarize school district financial health and progress to achieving their goals and objectives.
- Annual review and evaluation at all levels to inform updated strategic plans and future budgets which may involve an annual report, similar to a corporate report, that addresses student outcomes and includes financial information.

Appendix C: Example of Template for Tracking Sector Costs

LIST OF ESTIMATED COST PRESSURES					
Block Operating Grants required to cover Cost Pressures					
	2017/2018	2018/19	2019/20	2020/21	Comments
Cost of Enrolment Increases					
Cost Pressures Common to All School Districts					
Support staff wage increase					
Teacher Staff and TTOC wage increases					
Exempt Staff Increases					
Economic Dividend					
Labour Settlement Costs	-	-			
Upgraded New Generation Network Operating Cost					
Utilities					
Employee Benefits					
Liability Insurance					
New Programs					
General inflation -1.6%; 1.9% and 2% per year					
Other Cost Pressures	-	-			
Reductions in Costs					
New Procurement Entity, Insurance and Other					
Teachers Pension Plan Contributions					
Total Reductions					
TOTAL Cost Pressures	-	-			

Appendix D: Sample Reporting Templates for Three-Year Planning, Operating Reserves and Local Capital

Figure 1. Three-Year Operating Plan

Sample Three Year Operating Plan (Million \$)					Level of Risk (Conservative or Optimistic), Increasing or Decreasing over the Period
	Year 1	Year 2	Year 3	Assumptions	
Instruction	\$ 75.00	\$ 78.80	\$ 82.78	Enrolment is constant, inflation recognized	conservative -low risk as funding will increase with enrolment growth
District Administration	\$ 3.10	\$ 3.16	\$ 3.23	Compensation increases within	conservative - low risk
Operations and Maintenance	\$ 14.10	\$ 14.67	\$ 15.26	Inflation recognized	conservative - low risk
Transportation	\$ 1.88	\$ 1.94	\$ 1.99	Upgrade to add GPS to buses and cost	conservative - low risk
Total	\$ 94.08	\$ 98.57	\$ 103.27		
Salaries and Benefits	\$ 79.97	\$ 83.78	\$ 87.78	Salaries within mandate, benefits as projected by provider	low risk on compensation, high risk on cost of benefits
Supplies and Services	\$ 14.11	\$ 14.78	\$ 15.49	Increased by inflation	conservative low risk
Total	\$ 94.08	\$ 98.57	\$ 103.27		
Percent Change over Previous Year		4.77%	4.77%		
Revenue Projected	\$ 95.00	\$ 99.00	\$ 102.00		High risk that government will increase funding as projected and international students will continue to enrol and pay
Net Surplus/(Deficit)	\$ 0.92	\$ 0.43	(\$ 1.27)	District will draw on reserves in year 3 from the surplus in year 1 and 2	

Figure 2. Three-Year Plan for Accumulated Operating Surplus

Schedule of Operating Surplus Reserve	Opening Balance July 1	Planned Utilization Current School Year	Utilization Current School Year	Additions	Closing Balance June 30	Planned Next Year	Planned Year 2	Planned Year 3	Expected Balance	Comments
Internally Restricted due to Contractual Requirements										
Collective Agreements										
School Generated Funds										
Contracts with outside entities										
Contracts with Employees for Compensation and Benefits										
Internally Restricted by Board of Education due to Policy and Practice										
School Based Budget										
Department Based Budget										
Contingency										
Capital Plan										
Technology Plan										
Next Year's Operating Budget-included in Annual Budget to Balance										
Purchase Order and Contract Commitments										
Strategic Plan Goals (provide details of expected Use and Timeframe)										
Detail										
Detail										
Detail										
Total Fund Balance that is Restricted										
Unrestricted Operating Surplus										
Percentage Unrestricted is of the Operating Budget										

Figure 3. Three-Year Plan for Local Capital

		Planned for	Planned for	Planned for
Local Capital	Current Year	Year 1	Year 2	Year 3
Opening Balance				
Sale of Property-Board's Share				
Detail				
Detail				
Detail				
Total Sale of Property				
Net Expenses				
Transfer from Operating				
Assets Purchased				
Detail				
Detail				
Detail				
Total Assets Purchased				
Interest earned				
Closing Balance				

Appendix E: Potential Sections of a School District Budget Summary Document

Budget Summary

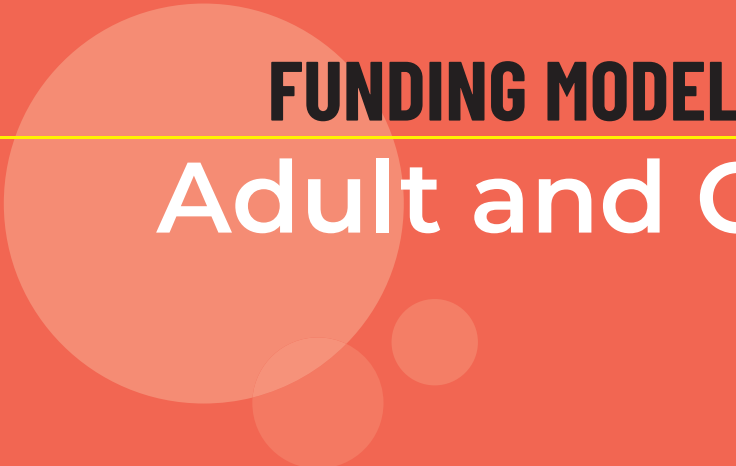
Key Decisions Made in the Budget

Strategic Plan Goals Addressed in this Budget

Use of Reserves

Comparison with Previous Year by Function

Three Year Plan by Function and Key Assumptions and Risks



FUNDING MODEL IMPLEMENTATION

Adult and Continuing Education

WORKING GROUP REPORT

OCTOBER 4, 2019

Background

The Adult and Continuing Education Implementation Working Group was tasked with assisting the Ministry of Education in determining the best approach to implementing Recommendation 11 of the Independent Review Panel's report:

Recommendation 11 – *Notwithstanding Recommendation 9, funding for the following programs should remain course-based:*

- *Graduated adults*
- *Non-graduated adults*
- *Continuing education (adult and school-age learners)*
- *Distributed learning (for adult learners only)*

While the Panel's original report included summer school as part of Recommendation 11, it is not related to Adult and Continuing Education and was therefore out of scope for the Working Group.

The Working Group agreed that there is a need for adult education programs in the K-12 sector. There are many reasons why some students do not complete and obtain their Dogwood in the regular timeframe, are unable to learn in the regular classroom setting or make life choices that require flexible scheduling of education. It is vital that the sector continue to provide adult education programs that ensure students are given the best opportunities so that they become or continue to be successful. This includes continuing to offer courses to adults through distributed learning.

The Working Group thoroughly discussed the need for adult programs, the delivery of those programs and how to better support students. The work included:

- Defining challenges and opportunities of existing program structures for Adult and Continuing Education;
- Revising the vision statement for Adult Education, as a foundation for program and funding policy;
- Reviewing relevant data, such as demographics of adult students and their educational outcomes, to articulate/provide stronger evidence on the current successes and challenges;
- Developing student profiles to better understand the range of learners in Adult Education programs, their learning needs, and their goals;
- Providing advice on key policy questions related to Adult Education, from system, district and school perspectives;
- Defining positive and negative implications for different funding approaches (i.e., course-based funding, program-based considerations and a combination/hybrid consideration);
- Suggesting mitigations for potential issues arising from different funding approaches; and
- Identifying possible indicators of success for adult programs and students, including completion and transition rates.

Meetings and Membership

The Working Group met four times between March and June 2019. The Working Group had 13 external members representing key partners in the BC K-12 education system and six members from the Ministry of Education, both from the Funding Model Implementation Team and the Adult Education program area. Emilie Hillier (Ministry of Education) and Deborah Jeffrey (Implementation Coordination Committee) co-chaired the Working Group. The Working Group's membership and meeting dates are listed in Appendix A.

Summary of Discussion Themes

Successes of current course-based funding model for adult and continuing education

- Non-graduated adults, including those who have struggled previously and other vulnerable adult students, have had success with current adult education programs.
- The Adult Dogwood provides a flexible pathway to graduation, employment and post-secondary studies for vulnerable students who are not able to complete the regular Dogwood and older adult learners who need a timely graduation credential.
- Elimination of tuition in 2017 for foundational and academic upgrading courses pursued by graduated adults has improved access to adult education.
- The current system provides the flexibility for adult students to enrol in the courses they need and when they need them (i.e., continuous entries throughout the year via distributed learning and Continuing Education centres).
- Course-based funding and multiple funding counts also enable districts to respond to increases in demand in adult education programs and at Continuing Education centres (adult and school-aged students).
- The current funding model is understood by current partners and stakeholders.

Diverse needs of adult learners

- Adult learners are diverse, and many are vulnerable students who have complex and unique learning needs.
- Some non-graduated adult students were not successful in achieving graduation as school-aged students and may face multiple barriers to education.
- In larger urban districts, many adult students are newcomers to Canada with language learning needs; some need additional supports (such as those from refugee backgrounds).
- While tuition may be free, many adult students face costs to attend school such as transportation, child care or foregone income.
- During their studies, some adults need a wide range of supports to be successful, such as counselling, learning support services or services for Indigenous students or English language learners. Under the current model, districts do not have access to supplemental funding for adults that re-enter the system.
- While it may cost less to educate adult students, the current funding differential between adult students and school-aged students and the lack of supplemental funding for adult students does not reflect all adult students' needs for supports.

Over-representation of Indigenous and young learners in adult education

- Indigenous learners, especially younger adults, are over-represented in adult education programs enrolment and in Adult Dogwood graduates.
- 18-year-olds also make up a significant proportion of adult learners and Adult Dogwood graduates.
- School-aged students should not be prematurely encouraged to pursue the Adult Graduation Program.
- If students are contemplating the Adult Dogwood, the student (and their parent/caregiver) should be fully informed of the implications, including how the credential differs from the regular Dogwood and the prerequisites needed for post-secondary study.

Continuing Education centres

- While many students at Continuing Education (CE) centres are adults, students aged 16 and up can also be enrolled in CE centres.
- Some school districts draw on the flexibility of CE centres to enrol school-aged students throughout the year to support career and trades programs that do not fit traditional school-year timelines.
- The current course-based funding model allows for innovative programming for school-aged students funded through CE centres, generating additional funding above the headcount funding.
- These programs are funded primarily in the second and third counts so should be considered in connection with the panel's Recommendation 9.

Other challenges and limitations of current funding model

- For some unique programs (e.g., in corrections centres or in rural/remote communities), course-based funding may not provide enough stability or consistency for a school district to offer adult education courses. In these circumstances, program-based funding could improve access to adult education.
- The 50/50 funding model for graduated adults poses financial planning challenges for school districts and may act as a disincentive for some districts to offer adult education courses.
- Students cross-enrolled in different districts are not eligible for funding in both locations, limiting the ability to take courses in neighbouring districts (e.g., adults at an Alternate Education school or school-aged students at a high school in one district are not funded for courses taken concurrently at a Continuing Education centre in another district).
- The restriction that students must be at least 16 to be funded through CE centres can limit access to career programs for younger students.
- The restriction that students claimed for funding at an Alternate Education school cannot be also claimed for funding at a CE centre limits vulnerable students' access to career programs in some districts.
- The differential in funding between courses for adults and school-aged students can limit the depth and complexity of the course design and delivery.

Proposed performance measures

- Completion rates for courses
- Time taken to complete courses
- At what levels courses are completed (e.g., what percent of students achieve C+ average or higher)
- Rates of transition from Foundations courses to high school completion courses
- Rates of transition from adult education programs to post-secondary institutions
- Positive feedback from post-secondary institutions, employers, local First Nations
- Feedback from students
- Fewer Indigenous students in the adult graduation programs
- Availability and variety of adult education programs throughout the province

Considerations

Funding model

- The group concurs with the Panel Recommendation to retain course-based funding for adult and continuing education and suggests maintaining multiple enrolment-count dates for funding.

Additional funding

- The group suggests that the Ministry consider adult students when deciding future directions for supplemental funding (e.g., for Indigenous learners, learners with special needs and English Language learners), as the course-based model does not include specific funding for support services.
- The group suggests addressing the funding differential between adults and school-aged students.

Other considerations

- The group suggests that accountability mechanisms be improved to focus on educational programming and student success.
- The group suggests that consideration be given to a process similar to the Quality Review process used previously for adult education programs.
- The group suggests that consideration be given for program-based funding for unique adult education programs (e.g., correctional facilities).

Related policy implications

- The group suggests that the needs of adult learners and continuing education programs be considered when examining the Independent Review Panel's Recommendations 4, 6, 9, 15 and 18 (see Appendix B for the full text of these recommendations).
- The group suggests that other issues raised through this process be further examined, with the potential to update relevant policies, including:
 - The premature shift of school-aged students and Indigenous students to the Adult Dogwood program;
 - Potential for the elimination of the 50/50 funding mechanism for tuition-free courses; and
 - Basing continuing education on course grade level instead of age.
- The group suggests that a final review of changes to the funding model be conducted in partnership between the Ministry data collection experts, partners and district leaders to examine unintended consequences.

Conclusion

Adult and continuing education play a critical role in BC's education system. It is vital to maintain adult education programs as options for learners. The decision to strike a full working group to examine Recommendation 11 speaks to the importance of adult and continuing education.

The Working Group appreciated the opportunity to thoroughly examine this recommendation with a wide group of partners beyond the usual stakeholders. Given the significant changes proposed as part of the funding model review, Working Group members appreciated the Ministry's approach of taking more time to consult and to establish multiple points of contact with partners. The Working Group felt that this was a useful model for future efforts to manage large-scale change to BC's education system.

Proposed approach	Implications of proposed approach	Mitigation strategies
Course-based Funding Model		
Course-based funding for all adult learners	Positive • Allows districts flexibility to respond to increases in demand • Allows adult learners flexibility to take classes they need, when they want • Allows adult learners flexibility to take courses in school or through distributed learning • Understood by current partners and stakeholders • Recognizes that most adults do not take a full course load (i.e., 8 courses concurrently) Challenges • May not provide enough support for unique or small programs (e.g., programs in correctional centres and rural/remote locations) • May not fully address the diverse needs of all adult learners	• Investigate possible increase to per-course funding for adults to assist in addressing the diverse needs of adult learners • Consider adults in the prevalence calculation for inclusive education • Consider addition of targeted funds for Indigenous adult learners • Investigate possible program-based funding for adult education programs in correctional centres and potentially also programs in rural/remote locations

Course-based funding at Continuing Education centres	Positive • Provides adults with another location for taking courses • Continuous multiple counts of students allows school-age students on the standard graduation program to take additional courses at non-traditional times (e.g., career courses that do not start and end in line with the school calendar and timetable) • Allows school-age students to take additional courses not offered/available at their local school (e.g., career pathway courses and dual credit programs offered in partnership with local college) • Enables districts in funding protection to respond to the needs/requirements of their respective students (i.e., students wanting specific and new career-oriented programs which would be offered/operated through a Continuing Education centre) Challenges • Conflicts with Recommendation 9 for headcount funding for school-age students • Without reconciliation with Recommendation 9, districts may report school-age students for funding through Continuing Education centres, resulting in a cost pressure to overall public education funding	• Investigate potential restrictions on the type of courses school-age students could take through a Continuing Education centre (e.g., only career pathway courses and dual credit programs) • Investigate potential restrictions on the number of courses school-age students could take through a Continuing Education centre • Ensure school-aged students at Continuing Education centres are there to supplement their learning (and not have it as their primary location for school) • Establish clear policies on dual credit and career programs
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Appendix A: Working Group Membership and Meeting Dates

Membership:

Name	Organization
Emilie Hillier (co-chair)	Ministry of Education
Deborah Jeffrey (co-chair)	Implementation Coordination Committee
Steve Hopkins	BC Association of School Business Officials
John Gaipman	BC Confederation of Parent Advisory Councils
Larry Mattin	BC Principals' & Vice-Principals' Association
Mike McGlenen	BC Principals' & Vice-Principals' Association
Geoffery McKay	BC School District Continuing Education Directors Association
Kevin Brandt	BC School Superintendents Association
Val Adrian	BC School Trustees Association
Michal Rozworski	BC Teachers' Federation
Loree Wilcox	Canadian Union of Public Employees - BC
Thane Bonar	First Nations Education Steering Committee
Barbara Binczyk	Ministry of Advanced Education, Skills and Training
Lynn Hauptman	Rural Education Advisory Committee
Sasha Gronsahl	Ministry of Education
Janine Hannis	Ministry of Education
Brent Munro	Ministry of Education

FMI Secretariat Support:

Tammy Blair	Ministry of Education
Neal Dobinson	Ministry of Education

Meetings:

- March 7, 2019 – Victoria
- April 16, 2019 – Richmond
- May 15, 2019 – Richmond
- June 20, 2019 – Victoria

Appendix B: Additional Independent Review Panel Recommendations

Recommendation 4

The Ministry should consolidate and simplify existing geographic funding supplements, the Supplement for Salary Differential and relevant special grants outside the block into a single supplement, with the following two components:

Component 1: 'Unique School District' characteristics should reflect some of the operational challenges of school districts compared to the norm by considering:

- The enrolment of a school district compared to the provincial median school district enrolment;
- The distance from communities containing schools to geographic centres containing basic services;
- The climate of a school district, characterized by the cost of providing heat and cooling for school; and the fuel utilized, and the amount and duration of snowfall in a school district;
- The distribution of students and schools across a school district, as characterized by:
 - The density of the student population in a school district, compared to the highest density school district in the province;
 - The average distance from each school to the school board office, including the effect of geographic features; and
- A modification of the current salary differential funding approach to be based on total compensation and expanded to include all school district employees.

Component 2: 'Unique School' characteristics, not addressed in the first component, should recognize the operational challenges of some schools by considering:

- The number of small schools within a school district, with different weightings and sizes used for elementary and secondary schools, and provide an increased contribution where a school is the only one in the community and is persistently under capacity; and
- The persistent over-capacity of schools at the school district level.

Recommendation 6

The Ministry should create a single Inclusive Education Supplement that incorporates all of the following:

- Supplemental Special Needs Funding;
- English/French Language Learning;
- Supplement for Vulnerable Students;
- CommunityLINK;
- Ready Set Learn;
- Supplemental Student Location Factor; and
- Funding currently in the Basic Allocation that was previously allocated to high incidence categories of special needs.

This single Inclusive Education Supplement should allocate funding through the following two components:

Component 1: Students requiring high-cost supports should be funded, and school districts should continue to report and claim these students to the Ministry for funding. More specifically:

- Funding eligibility criteria and the annual funding rate for students requiring high-cost supports should be developed and communicated by the Ministry, focusing on those students that are physically dependent and/or have needs that significantly impact the students' learning; and
- All funding claims in this category should be based on a medical diagnosis and should be subject to compliance audits to verify that eligibility criteria have been met.

Component 2: The remaining inclusive education funds should be allocated to school districts through a prevalence-based model, using a comprehensive range of third-party medical and socio-economic population data. Categories of data and weightings should be as follows:

- Health factors (50%)
- Children in care (20%)
- Income and earnings (20%)
- English/French Language development (10%)

Recommendation 9

The Ministry should base funding allocations for school-age educational programming on the number of students, rather than on the number of courses being taken. The Ministry should phase out the current course-based funding model by the 2020/21 school year.

Recommendation 15

Consistent with the shift to supporting student improvement and learning, the Ministry should:

- Shift the focus of the Compliance Audit Program from purely financial to have a quality assurance emphasis that incorporates best practices-based recommendations regarding student outcomes, structure of programs and services, and overall management of school district operations.
- Defer the recovery of funding for one year, to allow school districts time to adopt compliance team recommendations. This one-year deferral would not be available if it is determined that there has been deliberate contravention of funding eligibility policies.

Recommendation 18

The Ministry should identify net cost pressures and new program expenditures and, as part of the provincial budgeting process, bring them forward to Treasury Board for consideration when the total quantum of public education funding is being set.



FUNDING MODEL IMPLEMENTATION **Inclusive Education**

WORKING GROUP REPORT

OCTOBER 4, 2019

Overview

In early 2018, an Independent Panel (the “Panel”) performed a review of BC’s K-12 Public Education Funding Model with an emphasis on creating a system that is responsive, equitable, stable and predictable, flexible, transparent and accountable. The K-12 public education funding formula and allocation has not changed since 2002 and many stakeholders expressed the view that the system is not funded adequately.

While the current system meets the needs of the vast majority of students, the Panel found that there are a number of student populations, such as children and youth in care, Indigenous learners and students with unique learning needs whose educational needs could be better served. Service to these groups of students was found to be inconsistent and inequitable across the province and the Panel heard that the inability for school districts and communities to provide services was often linked to the funding model. Teachers and support staff expressed concerns about the level of resources and supports available and indicated that it is difficult to advocate for more help in classrooms. Parents/stakeholders identified that they were unsure of what to do or where to go if there were concerns about services.

The intent of the Panel’s recommendations was to provide a framework to strengthen equity of educational opportunity for a broader range of students by reducing service disparities across the province. The Panel wanted to maintain a student-focused approach that allows boards to focus on the timely provision of supports and services to students. The Panel’s goal was to ensure greater transparency on how funding is used and to improve the financial management and efficient utilization of funding. In addition, the Panel wanted to ensure funding was easier to access and that funding and funding rules are not a barrier, either real or perceived, to service provision.

After the report’s release in December 2018, four working groups were established with key education partners and stakeholders to assist the Ministry of Education in establishing implementation options. The Inclusive Education Working Group (the “Working Group”) was established to assist the Ministry of Education with determining the best approach for implementing Recommendation 6:

Recommendation 6:

The Ministry should create a single Inclusive Education Supplement that incorporates all of the following:

- *Supplemental Special Needs Funding;*
- *English/French Language Learning;*
- *Supplement for Vulnerable Students;*
- *CommunityLINK;*
- *Ready Set Learn;*
- *Supplemental Student Location Factor; and*
- *Funding currently in the Basic Allocation that was previously allocated to high incidence categories of special needs*

This single Inclusive Education Supplement should allocate funding through two components:

Component 1: Students requiring high-cost supports should be funded and school districts should continue to report and claim these students to the Ministry for funding. Specifically:

- Funding eligibility criteria and the annual funding rate for students requiring high-cost supports should be developed and communicated by the Ministry, focusing on those students that are physically dependent and/or have needs that significantly impact the students' learning; and
- All funding claims in this category should be based on a medical diagnosis and should be subject to compliance audits to verify that eligibility criteria have been met.

Component 2: The remaining inclusive education funds should be allocated to school districts through a prevalence-based model, using a comprehensive range of third-party medical and socio-economic population data. Categories of data and weightings should be as follows:

- Health factors (50%)
- Children/youth in care (20%)
- Income and earnings (20%)
- English/French Language development (10%)

While it was not the main recommendation of focus, the Working Group was also asked to ensure Recommendation 1 was considered from a global perspective as it has implications for the entire funding model.

Recommendation 1 stipulates that the Ministry should initially allocate funds to address students requiring additional supports and for unique school district characteristics as these areas represent the primary cost-drivers for school districts. All remaining funds would then be distributed per student.

Areas out of Scope but Important Considerations for Implementation of Recommendation 6

Over the course of the seven meetings, several important topics emerged that were deemed as out of scope for the Working Group. These should be considered when the funding system is finalized and are as follows:

Quantum: This particular topic was raised multiple times and comprised a significant portion of the dialogue. The Working Group was assured that the implementation of Recommendation 6 is not intended to reduce resources currently provided under the inclusive education supplement. The Working Group started from the premise that funding under a new model would support the same or improved services and if not, the Working Group's advice on implications would likely be different. The Working Group expressed significant concerns that funding in the current system is not meeting the needs of students and that any new model must contain sufficient funding as a baseline and the ability to increase over time if/when needs change. Members of the group reflected that many school districts currently spend more than their Special Education allocation provided due to the quantum and that the majority of school district annual budgets are allocated to staffing and benefits, which limits the flexibility to allocate additional funding to supports and services. The Working Group also assumed that if future costs to support student needs increase, the quantum would also increase.

Other panel recommendations: Although the Working Group did receive presentations from the leads of the Financial Management Working Group and the Advisory Committee for Enhancing Student Learning for context, some of the information and discussion was limited due to confidentiality concerns. In addition, the Group was asked not to consider or assess any of the recommendations beyond those it was tasked with.

Collective bargaining: The Working Group agreed to leave bargaining topics at the bargaining table and did not engage in a conversation or analysis of how a future funding model may impact collective bargaining conversations or future Collective Agreements. The Working Group does acknowledge and recognize that any changes in a funding model will likely impact future Collective Agreement negotiations.

Other ministries: There are clear linkages in Inclusive Education to other Ministries and Crown Corporations (e.g., Ministry of Children and Family Development, Ministry of Advanced Education, Skills & Training, Community Living BC) and the Ministry is aware that these Ministries will be impacted and will continue to work with them through the changes, however the Working Group agreed that discussing other Ministry programs and services were out of scope. The Working Group did however highlight that it is crucial in any implementation to ensure that other Ministries currently using Ministry of Education designations or school district completed assessments are aware of any future changes so that students do not lose services or access to programs and that there is a shared understanding of the value of student assessments to support learner success. The Working Group also acknowledged that the Ministry of Education will need to engage with other Ministries to ensure inter-ministerial protocols are updated as necessary.

Other Considerations

Economic modelling

Similarly to quantum, this particular topic was raised several times over the course of the seven meetings. Due to complexities and timing, the Working Group was not able to see modelling of a potential Inclusive Education supplement. The Working Group felt it would have benefitted from either a hypothetical model of a school district or an example comparing current funding and the proposed new funding. The Working Group understands that this work is still underway and that the Inclusive Education supplement must be modelled and considered within the framework of all the other funding pieces whilst ensuring improved service to diverse learners. However, the Working Group felt this impacted their ability to fully assess implementation implications. The Working Group expects their respective organizations to have an opportunity to be reconvened or to provide further feedback once the modelling is complete.

Future policy work

Although the Working Group was able to consider multiple implications and provide opportunities to address them, there are some outstanding pieces related to policy and program implementation. The organizations represented in the Working Group would like to be involved as the Ministry moves the policy work forward (e.g. to be able to review and have input into the final Complex Needs/High-Cost category). Many in the working Group also asked for an ongoing Committee on Inclusive Education to continue to build on the relationships established and to continue to have input into the Ministry's work in this area.

First Nations consultation

The Ministry of Education recognizes its unique consultation obligations to First Nations as rights holders separate and outside of this process. The Ministry will ensure that bilateral discussions, as committed to under the BC Tripartite Education Agreement (BCTEA), take place as part of commitments to support improved educational outcomes for First Nations students.

Background

The Working Group met seven times between March and August 2019. The Group was comprised of 20 external members representing key partners in the BC K-12 education system and four Ministry of Education staff from the Inclusive Education Branch (Learning Division) and Funding and Financial Accountability Branch (Resource Management Division). Co-chairs of the Working Group were Cloe Nicholls, Executive Director of Learning Supports from the Ministry of Education and Piet Langstraat, Implementation Coordination Committee. Names and affiliations of Working Group members are appended to this report (Appendix A). This report reflects what was discussed by the Working Group and is a Ministry document that is not endorsed by any of the organizations represented in the Working Group. Over its seven meetings, the Working Group spent considerable time talking about and understanding the current funding model and delineating the difference between a funding model and a spending model. Through further meetings, the Working Group identified and explored many implications and potential opportunities to address them.

Considerations for Potential Implementation

1. Accountability & Transparency

Implications related to accountability and transparency are relevant under a future hybrid model but would also create improvements if addressed under the current model.

Implication: Given that Recommendation 6 proposes that funding identified for specific purposes (e.g., Ready Set Learn, English Language Learners (ELL), CommunityLINK) be rolled up into a broader Inclusive Education supplement and for districts to continue to have full discretion of how to spend the funding across their district, the Working Group agrees that accountability is the fundamental underpinning of all the Funding Model work. The Working Group believes that for Recommendation 6 to be successfully implemented, a robust, transparent accountability structure is required. This accountability structure must be focused on more than just financial accountability and must include clear actions the Ministry will take to ensure equitable outcomes for all learners. The Ministry as well as boards of education have a shared responsibility to ensure financial and system accountability; various levels and forms of support are required to ensure accountability. However, many in the Working Group also articulated that accountability is fundamentally important in the current system as well, and that efforts to better demonstrate how boards assess students, allocate funding and provide services and supports would be expected in either model.

Opportunity: Ensure that any shifts in Inclusive Education funding are aligned and implemented in concert with the Framework for Enhancing Student Learning and the recommendations from the Financial Management Working Group. It must be clear to the public which factors are considered for funding, what can be considered as appropriate service expectations and how districts will budget to provide those services. The Ministry should ensure boards create a public, transparent process outlining how students will be assessed (e.g., diverse abilities, children/youth in care, ELL); the types of services and supports that are expected to be in place; the process that will be followed to ensure supports are in place; the funds budgeted for those supports and what recourse is available for parents, caregivers and students if the process is not followed, if they require more information or if they disagree with a board decision. There also needs to be a way for school districts to consult with the Ministry to ensure accuracy of the prevalence model data, thereby ensuring checks and balances for the amount of funding provided.

2. High Cost Component – Policy & Eligibility

Implication: A new complex needs/high-cost category will need to be developed. Confirmation is needed that full funding for the “high cost” category will be regularly monitored and adjusted based on actual costs of services and supports.

Although the Panel’s report refers to a “high-cost” category, the Working Group agreed that a more inclusive and appropriate term would be “complex needs and high-cost supports”. This recognizes the complexity of student needs without suggesting those students are “expensive” or a burden. This report will use the term “complex needs/high-cost supports” for clarity.

Opportunity: The Working Group discussed options for a new category and came to the following options:

- A. Create a new category that includes the current criteria for Category A (Deafblind) and B (Physically Dependent) and also expands the physically dependent criteria (currently feeding, dressing, toileting, mobility, personal hygiene) to include additional functional domains (social/emotional regulation and safety, self-determination and independent living, communication/language processing and cognitive). Students would need to have complex needs in multiple functional domains in order to qualify for this category.
- B. Keep Category A and B and add a third category that includes complex social/emotional behavioural needs. This third category would also need to meet the criteria as described in Category A.

Further assessment of options and related discussions for this category is attached in Appendix B. The Working Group did reach consensus that the current Level 1 category is not meeting the needs of all students, particularly those with complex socio-emotional or behavioural challenges and that it should be expanded slightly to ensure additional supports can be provided. This expansion should also be done thoughtfully and with clear criteria to ensure transparency for parents and school districts as well as to ensure that the category can be funded appropriately. The Working Group recognizes there is a possibility that this category could grow in a way that is ultimately unsustainable unless there are clear criteria and a review process in place.

Further work is required to finalize the criteria for this category, create system-wide understanding and look at options to address cost escalation as well as monitor/evaluate designations of students in these categories, with attention to the proportional designation of specific populations of students. Many of the organizations represented in the Working Group would like to take part in that future work.

3. Prevalence Component – Data & Modelling

Implication: Prior to the prevalence model being implemented, it will be essential to know the degree to which funding levels may change in school districts and share this information publicly as this may have staffing and resourcing implications. As stated above, the Working Group had a strong desire to see this modelling and provide input as a part of the process.

Opportunity: Ministry staff will begin work in Summer 2019 to create models and metrics for sample districts comparing the current system to a system based on prevalence. This modelling will provide greater understanding and certainty as well as transparency to school districts and will help to inform the Ministry of short-term transitional funding needs and any required funding policy adjustments. The Working Group emphasized the need for ongoing refinement of the formula to ensure the model continues to meet the needs of the students it is meant to support.

Funding for all seven areas of funding outlined in Recommendation 6 are collapsed into one and there needs to be examples through modelling and discussions with school districts.

Implication: The weighting assigned to each sub-component as recommended by the Funding Model Review Panel of the prevalence data calculation in Component 2 requires modelling to be evaluated.

Opportunity: The weighting of the prevalence data calculation as recommended by the Funding Model Review Panel; Health Factors (50%), Children/Youth in care (20%), Income and earnings (20%) and English/French Language Development (10%); will need to be reviewed and recalibrated as the process of modeling continues.

Implication: Under a potential prevalence model, the current 12 special needs designations will no longer be used to categorize students or to trigger supplemental funding and disaggregated data by designation may no longer be reported. Data on levels of support and outcomes for students with diverse needs and from diverse circumstances must continue to be collected and published to support student success. Individual confidentiality and masked data will need to continue to be respected.

Opportunity: The Ministry needs to establish a rigorous data collection method with a quality assurance component to ensure that school districts continue to track and report on students with diverse needs. Data by designation will continue to be available from the Ministry of Health and used as a part of establishing the prevalence formula; the Ministry should report out on all data used in the model as permitted by the Ministry of Health. Individual confidentiality and masked data will need to continue to be respected.

The Ministry has started an internal Data Quality Strategy team to generate options for data transitions. The Ministry would like to ensure that students who are currently designated in a specific category will not be lost and that there will be a transition with the current data. The Working Group supports this idea and many members in the Group are interested in being engaged in that work moving forward.

Implication: Census and some other data will not be current enough to recognize emerging needs, particularly in the case of data for English Language Learning (ELL) students and income and earnings census data may also lack accuracy in serving as a proxy for instructional need as questions related to language spoken in the home do not correlate with an established need for ELL services and supports. Census data may also lack relevance for quantifying the complexity of language diversity in school districts as census boundaries differ from school district boundaries.

Opportunity: The Working Group believes the Ministry should consider accessing additional data sources that may provide more recent evidence of emerging needs. The Working Group understands that the best available third-party data is the census, however other reliable and available data sources across the whole province should also be considered.

For example, school districts collect data through the 1701 process that could be used to create a new robust data source as this data includes information on primary home language for each registered student. This information is provided by parents on school registration forms and no additional 'incentive' is required to encourage school districts to collect the data.

Some working group members suggested data for Income and Earnings may come from the Ministry of Social Development or be determined through similar formulas used with the vulnerable student supplement (as a component of CommunityLINK).

Implication: Widely divergent levels of access to and utilization of local medical and other support services for children may impact the accuracy of the medical data used for prevalence. The Working Group specifically discussed the implications of access for rural/remote and First Nations communities and indicated that there will need to be a specific strategy to ensure that these populations as well as others who may not have access to or utilize supports and services are represented.

Opportunity: The Ministry will need to work with parent groups and other Ministries to help increase awareness of the proposed new model and its purpose. This should include ensuring that there is an understanding that this is not a move to a medical model and that privacy will be protected. As the model is a prevalence model (not an incidence model), not every student needs to be captured; there is an ability to scale up the data the Ministry does have and apply it to the whole school district. This ensures that students who do not have access to or do not utilize services for a range of different reasons are still represented in the model. The Ministry will also ensure a specific focus on rural/remote and First Nations communities in reviewing the prevalence data.

4. Supports & Services

Implications related to supports and services are relevant under a future hybrid model but would also create improvements if addressed under the current model.

Implication: Services and supports for students in the current system are not solely dependent on funding, for example students with designated learning disabilities are provided with supports through block funding. Continuing to assess students' needs in order to ascertain the services that best fit the needs of the learner is key in any funding system for Inclusive Education. The elimination of a requirement to assess, categorize and designate students to receive supplementary funding for the prevalence component of a hybrid model could result in decreased focus and effort to complete student assessments as the money will already have been provided to the school district. The Working Group agrees that there needs to be a way to ensure assessments to inform instruction, supports and services will continue with the proposed new model. The Working Group also believes quality Individual Education Plans (IEP) need to continue to be a part of planning and support for students with diverse abilities and disabilities.

Opportunity: Ministerial Orders and the Inclusive Education Policy and Guidebook will need to be updated to ensure schools and districts are aware of their continued responsibilities to assess student needs and provide supports and services. Such assessments must be commonly understood and transferrable so that students moving from one school or district to another, or outside the BC public school system, will be accompanied by a copy of the assessment (with parent permission) and supporting documentation to support their learning needs.

Implication: With some Inclusive Education funding no longer tied directly to assessments, Ministry designations and ELL service, parents will require assurances that their child's educational needs will be identified and met along with their child's human rights and that their parental rights and responsibilities as advocates for their children are not being lost with the implementation of a new model.

Opportunity: A *Parent Guide* will be developed collaboratively with parents and caregivers to describe the proposed new funding allocation system, the rights of parents and students and the responsibility of school districts to accommodate students with diverse abilities or disabilities and diverse language backgrounds. The Working Group also agrees (as above) that boards should be required to publicly outline how they plan to provide services to students within their budget, including how they will continue to assess student learning needs. The Working Group feels this strategy is relevant in any funding model moving forward and would also benefit the current model.

5. Transitions/Timing

Implication: Shifting to a new funding model is a complex and iterative process. There may be factors (such as student shifts in ELL student demographics) unique to school districts that are not accounted for within the initial prevalence model and weighting.

Opportunity: The Ministry should work with school districts to articulate a process whereby concerns or additional unique school district factors that impact student needs can be shared with the Ministry for funding consideration. For example, arrivals of significant numbers of refugees within a school year or increased diverse learners with complex needs and high-cost supports. A strong model may capture transient student populations in school districts as a variable and consider that some larger school districts may be able to absorb this variability while smaller school districts may experience a more significant impact.

Implication: The proposed new funding model will require local and provincial procedural changes to Ministry policy and a clearly communicated understanding of the factors considered in the prevalence funding calculation for each school district.

Opportunity: The Ministry will need to provide support through resources and tools for practitioners, particularly in the transition phase, to enhance understanding and to build operational capacity. This is also necessary to ensure that a similar level of support can be expected when a student transfers from one school district to another. School districts will need to be provided with clear information to understand the new funding model and how it strives to represent the diversity and complexity of the needs of students in their district and reflect the current practices in Inclusive Education. School districts will also need to understand what their options are to seek additional funding (if any) if they feel there are unmet needs.

Implication: The significant changes in funding model and implications related to service delivery are not yet well understood. There is a high degree of uncertainty and even fear of the unknown. Current Ministry Policy, Ministerial Orders and the Special Education Policy Manual will require updating and there will also be impacts on inter-ministerial agreements.

Opportunity: Ministry staff has and will continue to activate a comprehensive engagement and communication strategy to support the successful implementation of the new Inclusive Education funding model. Key elements will include:

- Clarity on how the new model allocates appropriate funding and helps to fulfill a commitment to prioritizing support for individuals and communities with the highest needs;
- Confirmation of the amount of funding that will be allocated to each school district, the rationale and formula used to determine the funding amount and clear processes that will be followed within each school district to spend the funding equitably on student services and supports;
- Explanation of how individual student and family confidentiality will be protected in the data gathering process;
- Confirmation that government will have a transparent process to provide adequate, sustainable and equitable funding for students with intensive supports including equipment and full-time support staff;
- Development of a *Parent Guide* and an *Inclusive Education Guidebook* to ensure a shared understanding of the operation of the new model and service delivery expectations;

- Engagement in comprehensive work with stakeholders (many already represented on the Working Group) to develop and pilot the details of the implementation strategies;
- Training for staff in the education sector to implement the new model and accompanying accountability mechanisms;
- A managed implementation to support the transition to the new model;
- Any shifts in Ministerial Orders, Policy or Guidebooks to be in place prior to implementation;
- Conducting a review of the new model one year after its full implementation and conducting ongoing and regular reviews of the model thereafter;
- Assurance to parents and Student Services staff that an individual student's diagnosis or designation – or absence of either – will not impact the provision of services;
- Assurance that individual school district assessments will not affect the prevalence model and that not being recognized in the prevalence model will not impact services and supports in the system; and
- Potential to engage with post-secondary institutions to update certification and degree program components to become more inclusive.

Ministry staff recently engaged in an intensive consultation and collaboration with education stakeholders and rights holders to update the Special Education Policy Manual. Further updates to the policy and related Ministerial Orders will need to be completed to align the final policy with the potential shifts in funding allocation. This work should involve members from this Working Group as well as Ministry partners.

6. Building Capacity

Implication: Senior leadership staff in the education sector will require ongoing new learning to implement the new model and its accompanying accountability mechanisms.

Opportunity: Increased and improved understanding of the model will support senior leadership staff to implement the model.

7. Audit & Compliance

Implications related to audit and compliance are relevant under a future hybrid model but would also create improvements if addressed under the current model.

Implication: The existing financial audit program will need to be changed so that it aligns with a new funding model.

Opportunity: New audit requirements should be developed and field tested. Such an initiative will allow for an additional emphasis on qualitative elements rather than audits confined to procedural compliance ("yes or no" evidence that services have been provided). Any new audit program will need to take into account the hybrid funding model for Inclusive Education and the potential to have different approaches between Component 1 (complex needs/high-cost supports) and Component 2 (prevalence).

The Working Group felt the current audit process in place would also benefit from an additional emphasis on qualitative elements and student outcomes, rather than a narrow focus on fiscal compliance. The Working Group also discussed the benefits of increasing program/policy compliance regardless of which funding model is in place (e.g., adherence to Special Education Policy Manual; quality of IEPs; monitoring of student well-being and outcomes) in addition to ensuring fiscal compliance remains in place.

8. Ongoing Monitoring of the Implementation

Implication: Monitoring success of the proposed new model and adjusting accordingly must take place to ensure adequate funding for direct service to children.

Opportunity: The Framework for Enhancing Student Learning is a tool that can be leveraged for accountability and will include requirements for school districts to share student results related to specific learner cohorts. Collecting this data, as well as other data, will allow for ongoing adjustments to the model and will establish accountabilities for appropriate use of resources to provide the necessary services and supports to ensure the success of all students. These outcomes should be reported on annually so that any necessary adaptations and improvements can be made in a timely manner. See Appendix B for summary notes related to various themes that were discussed by the Working Group.

Conclusion

- The Working Group agrees that this is an incredibly complex topic resulting in a range of viewpoints within the Working Group and beyond.
- A full analysis can be performed, or starting change management within respective organizations can begin and concerns about quantum can be addressed when modelling becomes available.
- There is a general agreement that the current Inclusive Education system is not providing adequate supports to students, families, school staff and communities due to a range of complex factors.
- There is also a general agreement that this new model is an opportunity to leverage to improve the Inclusive Education system.
- Increased and improved training for staff in the education sector will be needed for successful implementation of the new model.
- The Working Group supports the opportunities identified in this report but believes the Ministry should ensure there is on-going involvement with the education sector to inform and advise the policy and program implications, the operation of the new model and future assessments and evaluations of the funding system.
- The Working Group would like the Ministry to provide specific timelines for funding implementation moving forward, including stakeholder communication and engagement.

Attachments

Appendix A – Working Group Membership and Meeting Dates

Appendix B – Themes from Working Group sessions

Appendix A: Working Group Membership and Meeting Dates

Membership:

Name	Organization
Cloe Nicholls (co-chair)	Ministry of Education
Piet Langstraat (co-chair)	Implementation Coordination Committee
Darleen Patterson	BC Association of School Business Officials
Kim Currie	BC Confederation of Parent Advisory Councils
Lisa Gunderson	BC Confederation of Parent Advisory Councils
Dr. Bob Eslinger	BC Council of Administrators of Inclusive Supports in Education
Tracy Humphreys	BCEdAccess
Deena Buckley	BC Principals' & Vice-Principals' Association
Teresa Downs	BC School Superintendents Association
Stephanie Higginson	BC School Trustees Association
Donna Sargent	BC School Trustees Association
Clint Johnston	BC Teachers' Federation
Tracey Mathieson	Canadian Union of Public Employees - BC
Warren Williams	Canadian Union of Public Employees - BC
Satnam Chahal	English Language Learning Consortium
Angela Clancy	Family Support Institute of BC
Barbara Kavanagh	First Nations Education Steering Committee
Karen DeLong	Inclusion BC
Blair Mitchell	Representative for Children and Youth
Terry Taylor	Rural Education Advisory Committee
Patricia Kovacs	Ministry of Education

FMI Secretariat Support:

Sofie Grahn	Ministry of Education
Cara Williams	Ministry of Education

Meetings:

- March 8, 2019 - Victoria
- April 15, 2019 - Victoria
- May 9, 2019 - Victoria
- June 6 and 7, 2019 - Victoria
- July 4, 2019 - Victoria
- August 7, 2019 - Victoria

Appendix B: Themes Generated from Inclusive Education Funding Model Working Group

This document summarizes themes that were generated during an Inclusive Education Working Group meeting held on June 6, 2019. This document was created by Ministry of Education staff but is not considered a Ministry document outlining Ministry perspectives. The document is a summary of a discussion that took place during the Working Group meeting.

These themes were generated following a group brainstorm on the following questions:

1. Given what has been presented on how a possible prevalence funding model would work, what would the implications be?
2. What elements need to be in place to make the “spending plan” (supports and services) successful?
3. What most concerns you/your members about this situation?
4. What is unclear/needs more information?

Themes	Description of Implications – We will need to...	Mitigations – How could we address this?
Assessment	Establish a process to ensure continuation of assessments for supporting student learning.	- Require that school districts establish a process to assess the needs of students and ensure the assessment process is transparent and publicly available. Factors that should be a part of the process include: - o Consultation with parents. - o Continuation of meaningful IEPs. Make it a plan to meet the needs of the child, not a driver of funding. - o Map out the diverse ways that student needs can be determined, that may lead to various kinds of assessments. - If we are changing criteria for how we assess kids, we need to ensure cross-ministerial involvement (ministries of Children and Family Development, Health, Mental Health and Addictions, etc.).
	Provide clarity about the types, purposes, accessibility and timing of assessments to accurately assess student needs.	- Identify best practice in a policy or handbook to ensure assessments are student focussed not spending focussed. - Provide information on the different types of assessments available within the school district. - Expand the notion of what an assessment is beyond psych-ed (i.e., behavioural, classroom teacher, parent, showing how assessments are flexible and responsive to student needs). - Ensure there is clarity here on when/why we engage with level A, B, C assessment including language proficiency assessments. - Ensure transfer of information from early childhood (CDCs, etc). - Address regional concerns as they relate to assessment (especially Level C). This has implications for resourcing, training and timely accessibility.

Appendix B: Themes Generated from Inclusive Education Funding Model Working Group

Provision of Supports and Services	Identify the types of supports and services that can reasonably be expected to be in place, based on student needs and/or diagnosis.	- Develop provincial guidelines that outline supports and services aligned to student needs. The guidelines should: - Be broad enough to consider context - Include examples that can be accessed and used to shape practice - Align supports and services with other ministries (e.g., Health, Children and Family Development) - Consider access based on geography - Describe how to provide highly-qualified support staff to support kids, not one person assigned to one student - Ensure there are clearly defined contacts/information on Ministry website. - Include relevant provisions, decided between district and local First Nations.
	Improve families/caregivers support.	- Develop a provincial handbook for parents/guardians as a resource to navigate the system. The handbook should include: - A clear process for parents/guardians to access services - Clear communication of supports/services available - Language that is accessible to families - Family advocate that follows up with families that works alongside the school district.
	Implement school-based teams or cohorts of supports for students and/or a Community of Practice Paradigm.	- Describe processes for establishing school-based teams or cohorts. - Ensure all members of the team know what they are doing to support the student. - Ensure there is co-teaching and co-planning time imbedded into the school schedule.
	Address Children and Youth in Care (CYIC) needs.	- Create a province-wide contact log for the school district CYIC contacts. - Identify the additional supports and services that should be provided to CYIC.
Accountability	Develop a structure from the Framework for Enhancing Student Learning to ensure accountability.	- Ensure the structure is informed by strong planning; linked to strategic plan. - Include qualitative data and not only data from the warehouse. - Require incident data reported out to Ministry/school districts. - Strengthen the appeal/complaint process in place. Include a level of appeal beyond the district and board of trustees. Provide an advocate/representative. - Ensure auditors have a background in special education and have recent field experience.

Appendix B: Themes Generated from Inclusive Education Funding Model Working Group

Accountability (Continued)		- Determine how to select students for audit purposes. - Include audits for a selection of IEPs to review for quality. - Compare district audit results to determine impact of the prevalence funding model. - Minimize school district paperwork. - Require public reporting that provides confidence for <u>all</u> stakeholders that is easy to access and understand (e.g., funds received and allocated for complex needs; funds received and allocated via prevalence model). - Require districts to report out on accountabilities. - Develop guidelines for how school districts are accountable to the students in the previous funding model.
	Ensure funding is allocated equitably within school districts and that prevalence funding is being directed appropriately to support student learning needs.	- Establish a process for ensuring IEPs are put in place including reporting requirements. - Align IEP accountability and reporting processes with school district reporting timelines. - Monitor beyond report cards to include student and parent surveys disaggregating responses (e.g., CYIC, Indigenous, ELL). - Require schools to look beyond just ensuring students are meeting expectations to providing comments that show how students are progressing. - Include target setting in administrative procedures for school districts. - Ensure supports are clearly identified for all students including those that can't meet grade level expectations.
	Monitor student outcomes/achievement/goals in IEPs and ensure regular progress reporting.	Use the deliverables that are a part of BCTEA to ensure inclusive education supports are a part of LEA.
	Ensure inclusive education supports are a part of the Local Education Agreement (LEA) between school districts and First Nations.	

Appendix B: Themes Generated from Inclusive Education Funding Model Working Group

SD Capacity	Ensure capacity to implement the model equitably.	• Ensure leaders within the system support and understand the new model. • Ensure recruitment/retention of staff with proper training, across the province. • Build internal school district capacity by working with pre-service and in-service providers to ensure educators are supported to increase their capacities. • Provide guidelines on how teachers can effectively work with support workers to ensure collaboration. • Ensure unique geographic factors are considered when determining costs. • Ensure training resources are available for educators to support them to teach all students. • Provide more spaces for EA training and standards for EA training across the province.
	Address different requirements for IT supports.	• Access to technology, including supports and services in rural/remote areas. • Online access to education programs (e.g., Yorkeville and Athabasca).
	Promote diversity.	• Ensure diversity and culture are lenses through which support is provided, communication is messaged and how resources are developed.
Transition	Address obstacles for student transitions.	• Require school districts to use MyEducationBC and enable the system to hold all student information. • Align supports under the existing model with the new model.
	Ensure transitions between First Nations and provincial school systems include all relevant student information.	• Require school districts to use MyEducationBC and enable the system to hold all student information. • Use BCTEA to formalize a process for school district and First Nation schools to work together to develop strong relationships.

FUNDING MODEL IMPLEMENTATION **Online Learning**

WORKING GROUP REPORT

OCTOBER 4, 2019

Background

The Online Learning Implementation Working Group (the Working Group) was tasked with assisting the Ministry of Education in determining the best approach to implementing Recommendation 10 of the Independent Review Panel's report:

With the shift to a per-student-based funding model, the Ministry should develop a new policy and program delivery model for Distributed Learning to ensure consistent access to quality programming for all students in the province.

The Working Group agreed that Distributed Learning (DL) has long supported the province's commitment to serve every student and to provide access to education despite the challenges of geography or circumstance. The Working Group also agreed that the current DL model needs improvement to ensure that issues of quality, equity, accountability and access are addressed, regardless of any new funding model.

The Working Group suggested that term DL was not well understood, and the current legislative definition was outdated and restrictive. They offered a few alternatives, including e-Learning or online learning. Either term supports their view that DL be considered an integrated part of the continuum of learning, not necessarily a separate "program." For the purpose of this report, we will use the term "e-Learning."

The Working Group discussed thoroughly the need for e-Learning, its integration across the education system and its potential to better support students. The work included:

- Workshopping the 22 recommendations from the Independent Review Panel for a common understanding and identification of the connections with Recommendation 10, and to discuss the strengths and weaknesses of the recommendations;
- Defining challenges and opportunities that exist within the current model;
- Revising the vision statement for e-Learning, as a foundation for program and funding policy;
- Reviewing research, including a summary of current literature and promising practices in other jurisdictions;
- Collecting and reviewing samples of DL data from current DL program providers. This was compared to overall provincial data on course completion to articulate/provide evidence on the current successes and challenges;
- Developing student profiles (holograms) and the document "Student Journey" to better understand the range of learners served by DL, their learning needs and their goals;
- Analyzing and evaluating three potential service models for e-Learning, leading to the development of the proposed model;
- Identifying challenges and proposing mitigation strategies for the proposed model, including funding; and
- Providing advice on key policy questions from the perspectives of stakeholders.

Meetings and Membership

The Working Group met four times between March and July 2019. The Working Group has ten external members representing key partners in the BC K-12 education system and four members from the Ministry of Education, both from the Funding Model Implementation Team and the Distributed Learning program area. Eleanor Liddy (Ministry of Education) and Mike McKay (Implementation Coordination Committee) co-chaired the Working Group. The Working Group's membership and meeting dates are listed in Appendix A.

The Working Group also established an online "classroom" in MOODLE, one of the common learning management systems in use by K-12. This classroom was used for group discussion, posting questions and providing documents.

Summary of Discussion Themes

The current funding model and how it works

- Discussion of the current model included 1) the challenges associated with different funding for online vs. bricks and mortar learning, 2) the level of flexibility and choice inherent in both types of learning and 3) the challenges of cross-enrollment for funding.

The jurisdictional scan

- An overview of research on e-Learning and an international scan of best practices was completed.

Governance, quality assurance, capacity and looking to the future

- Both online and "traditional bricks and mortar" learning should focus on the student.
- Any new model must address the "competition" for students (i.e., funding) among various e-Learning providers (e.g., public, independent).
- Quality assurance reviews of programs should be rigorous and lead to improvement or change in practices if needed.
- Better data and information are needed to make informed decisions about student outcomes and effective programs.
- Blended learning (a combination of e-Learning and face to face delivery) is already being used in schools now and should be supported.

Accountability and funding

- There should be equitable funding regardless of how learning is delivered.
- There was considerable discussion about head-count vs course-based funding. Members of the Working Group raised some concerns about elements of both methods of funding. For example, the current model provides school districts with funding for each course and is seen as supporting students who take more than a traditional full load of eight. A move to the headcount model would potentially reduce that additional support, and limit choice for students.
- How can the Ministry address the loss of revenue due to students attending classes outside of their home districts?
- School districts should be accountable for their students, no matter where those students take some of their program choices.
- Audit and compliance requirements should be the same for all program delivery, regardless of online or bricks & mortar. This process could be linked to the Framework for Enhancing Student Learning and should emphasize program quality rather than only funding compliance.

Equity and access

- E-Learning must improve learning for students with diverse and unique needs, students in remote or rural regions (keeping in mind that not all school districts offer e-Learning), and those students who cannot access a course at their school.
- Equity cannot simply be determined by a dollar value.
- Any new model must maintain or improve flexibility and choice for students/families while focussing on improving student outcomes.
- All teachers will have access to a similar set of e-Learning tools and resources.

Independent e-Learning

- Independent e-Learning must align with changes in public e-Learning in order to ensure program quality for all learners.

Indicators of Success

There was also considerable discussion on how best to measure student success and outcomes in the e-Learning environment. The Working Group pointed out that the traditional metric of course completion within the school year painted an inaccurate picture, due to the continuous entry model.

Other metrics suggested were:

- Completion rates and timelines for courses (within 6, 10, 12 months from the active start date);
- A range of student achievement metrics beyond course completion rates;
- Learning Analytics to better inform student engagement, pulled from the Learning Management System (LMS);
- Rates of transition from Foundations courses to high school completion courses;
- Rates of transition to post-secondary institutions;
- Feedback from post-secondary institutions, employers, local First Nations;
- Feedback from students and parents;
- Availability and quality of e-Learning programs throughout the province;
- An accountability framework adhered to by all partners; and
- Regular assessment for quality assurance.

Considerations

Funding model

- The Working Group strongly endorsed the principle that all learning be funded equally irrespective of delivery model. They also noted that currently e-Learning courses are funded less than courses offered in brick & mortar schools.
- The service delivery model for e-Learning recommended by the Working Group could be adapted to align with a funding model that is either course-based or student-based (headcount). Risks and benefits were identified for adapting to both funding models.

Other considerations

- The Working Group recommended that accountability mechanisms be improved to focus on course quality in order to identify and share promising practices and intervene where evidence of quality is lacking.
- The Working Group recommended that all students should have a home school district before enrolling for courses outside of their home district. That home district will continue to hold primary responsibility for the student's learning journey.
- There is a need for a transition period to allow students to complete their courses, for school districts to adapt to the new model and for the Ministry to establish the infrastructure required.
- A change in the funding approach for students with diverse needs or for all supplemental funding could result in some specialized e-Learning schools closing. This could potentially limit student and family choice.

Related policy implications

- The Working Group recommended a single policy be created for e-Learning that recognizes:
 - Continuous entry;
 - The rise of blended learning to be supported by the new service-delivery model;
 - The need to address the new limits to cross-enrollments and access to the proposed provincial infrastructure for e-Learning; and
- The Working Group recommended that a final review of changes to both the funding and service delivery models be conducted with the Ministry of Education data analysts, subject matter experts including practicing teachers and school district leaders to consider potential unintended consequences and to recommend mitigation strategies beyond those identified by the Working Group.

Conclusion

A high quality 21st century e-Learning option is essential because all students must be able to access the courses they want and need, regardless of where they are located and their personal circumstances. For all students, urban and rural, their current and future realities will require skill and sophistication in navigating e-Learning environments to learn, exchange information and connect with the wider community for study, work and social engagement. A robust e-Learning environment will help learners develop those skills.

Quality e-Learning, supported by a skilled and engaging teacher, helps BC to achieve its commitment to equity. It means that students are able to access foundational and elective courses whether they live in a rural or urban area, whether they are working through health or social challenges and regardless of their particular learning needs or styles.

The Ministry's decision to create a Working Group to examine Recommendation 10 speaks to the importance of the service provided today and that which is needed for the future.

The Working Group appreciated the opportunity to thoroughly examine this recommendation with a wide group of partners. Given the significant changes proposed as part of the funding model review, the Working Group members valued the Ministry's commitment to allow for the necessary time to consult and to thoroughly investigate the original Recommendation 10, its potential application and the challenges and mitigations related to the various models that were explored. The Working Group felt that this was a useful approach for future efforts to manage large-scale change to BC's education system.

Proposed approach	Implications of proposed approach	Mitigation strategies
Universal Access Model		
Provincially supported and funded infrastructure (LMS, Course Resource Repository and Capacity Building)	Positive - Provides a platform for consistency across the system (quality, student centred, student choice, inclusivity, accessibility) - Allows for cost efficiencies - Provides user equity - Access to infrastructure to be provided to all teachers - Provides access to entire education system - Provides IT support system-wide (financial accountability, inclusivity, accessibility, future oriented, quality) - Ensures tools and infrastructure provide a secure FOIPPA compliant environment Challenges - Ensuring equitable oversight between provincial and local systems - Perception of "lost autonomy" by school districts - School district and educator capacity to utilize new infrastructure - Funding implications	- Allow the ability to localize and personalize course content - Review and reporting requirements linked to the District Accountability Framework - Establish an on-going governance body including school district representatives to select and oversee the function of the LMS, assure course quality content and provide direction and advice - Develop a transition plan to include funding and support for capacity building

Development of a Master Agreement to support the transition to the new model	Positive - Establishes expectations of school districts that students have access to online courses either through a district-based e-Learning program and or the provincial service - Will be linked to the Framework for Enhancing Student Learning - Provides the ability to create standards for reporting student data - Reinforces school district responsibility for their students, regardless of who is delivering the course Challenges - Districts' ability to transition from existing infrastructure to the new provincial model	- Implement a transition plan - Revise current policies
Approved Provincial e-Learning Service Providers	Positive - Will ensure quality assurance as service providers will be viewed as the centre for expertise - Will allow for consistency e.g. onboarding, delivery, experience - Maintains choice for students where the local district cannot fully meet their needs Challenge - Creation of a predictable funding flow to support the e-Learning service delivery - May not fully address the diverse needs of all students	- Administer a provincial RFP allowing for the selection of more than one provider to support the diverse needs and requirements of students - Develop the new funding model
Limited Cross-Enrollment	Positive - Improved quality and accountability - Reduction of "grade shopping" by students - Clarifies school district responsibility for students Challenges - May be perceived as a loss of choice for students due to no "district-to-district" or "public-to-independent" cross-enrollment	<i>School Act</i> will need to be revised to clarify cross-enrollment and what entity is responsible for the student - Alignment between public and independent e-Learning

Equitable Funding	Positive • Reinforces the message that e-Learning is part of the overall learning continuum • Reduction of service disparity across the province • Simplifies the funding and reduces administrative burden to school districts • E-Learning will be funded the same way as other learning Challenges • Potential downsizing or elimination of some current local programs • May lead to an expectation of an increase to the overall block	• Providing a provincial infrastructure • Recommending a three-year implementation plan
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Appendix A: Working Group Membership and Meeting Dates

Membership:

Name	Organization
Eleanor Liddy (co-chair)	Ministry of Education
Mike McKay (co-chair)	Implementation Coordination Committee
Sterling Olson	BC Association of School Business Officials
Rob Peregoodoff	BC Confederation of Parent Advisory Councils
David Truss	BC Distributed Learning Administrator's Association
Karen Fello	BC Principals' & Vice-Principals' Association
Andrew Holland	BC School Superintendents Association
Carolyn Broady	BC School Trustees Association
Larry Kuehn	BC Teachers' Federation
Tracey Mathieson	Canadian Union of Public Employees - BC
Jo Chrona	First Nations Education Steering Committee
Manu Madhok	Rural Education Advisory Committee
Teresa McClintick	Ministry of Education
Mario Miniaci	Ministry of Education

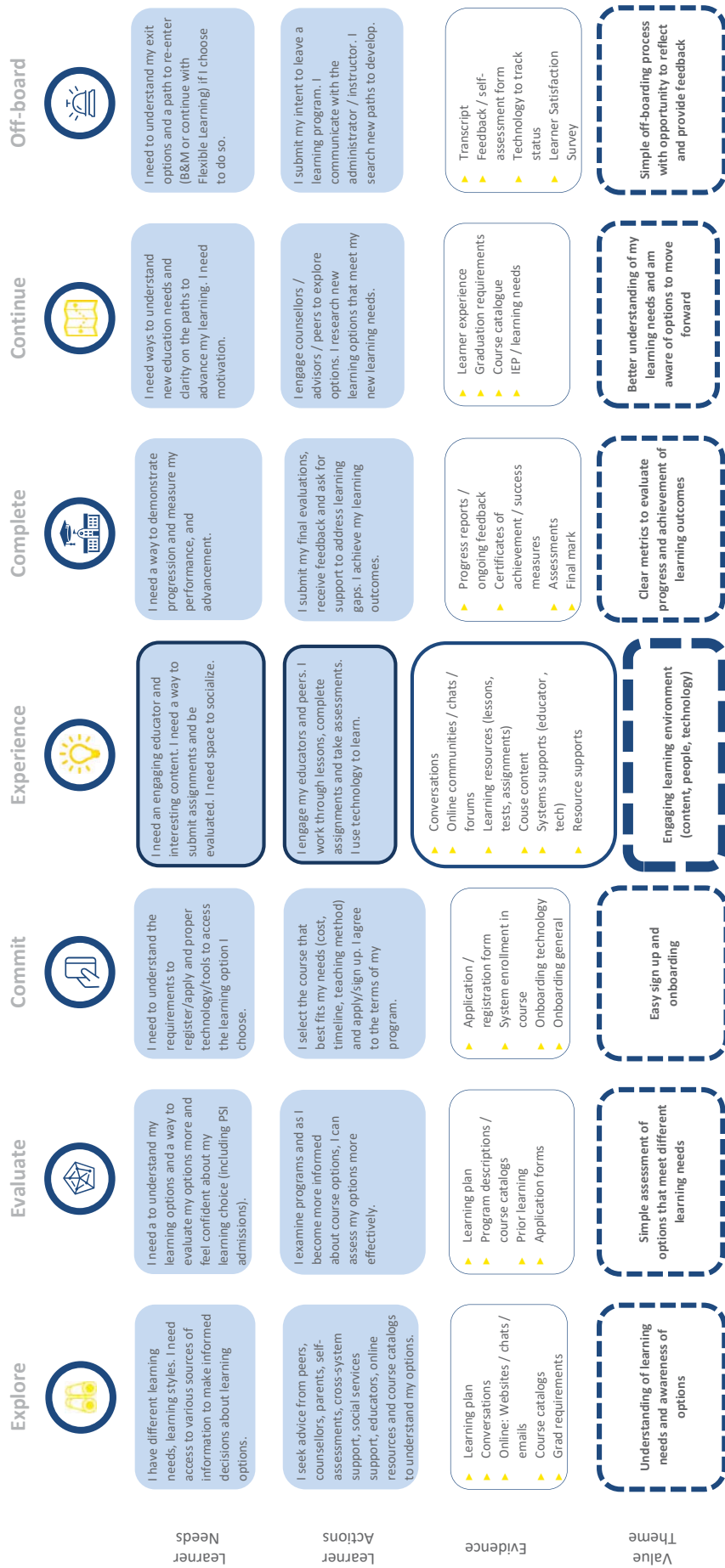
FMI Secretariat Support:

Delaney Chester	Ministry of Education
Jonathan Foweraker	Ministry of Education

Meetings:

- March 8, 2019 – Victoria
- April 29, 2019 – Victoria
- May 27, 2019 – Victoria
- July 3, 2019 – Victoria

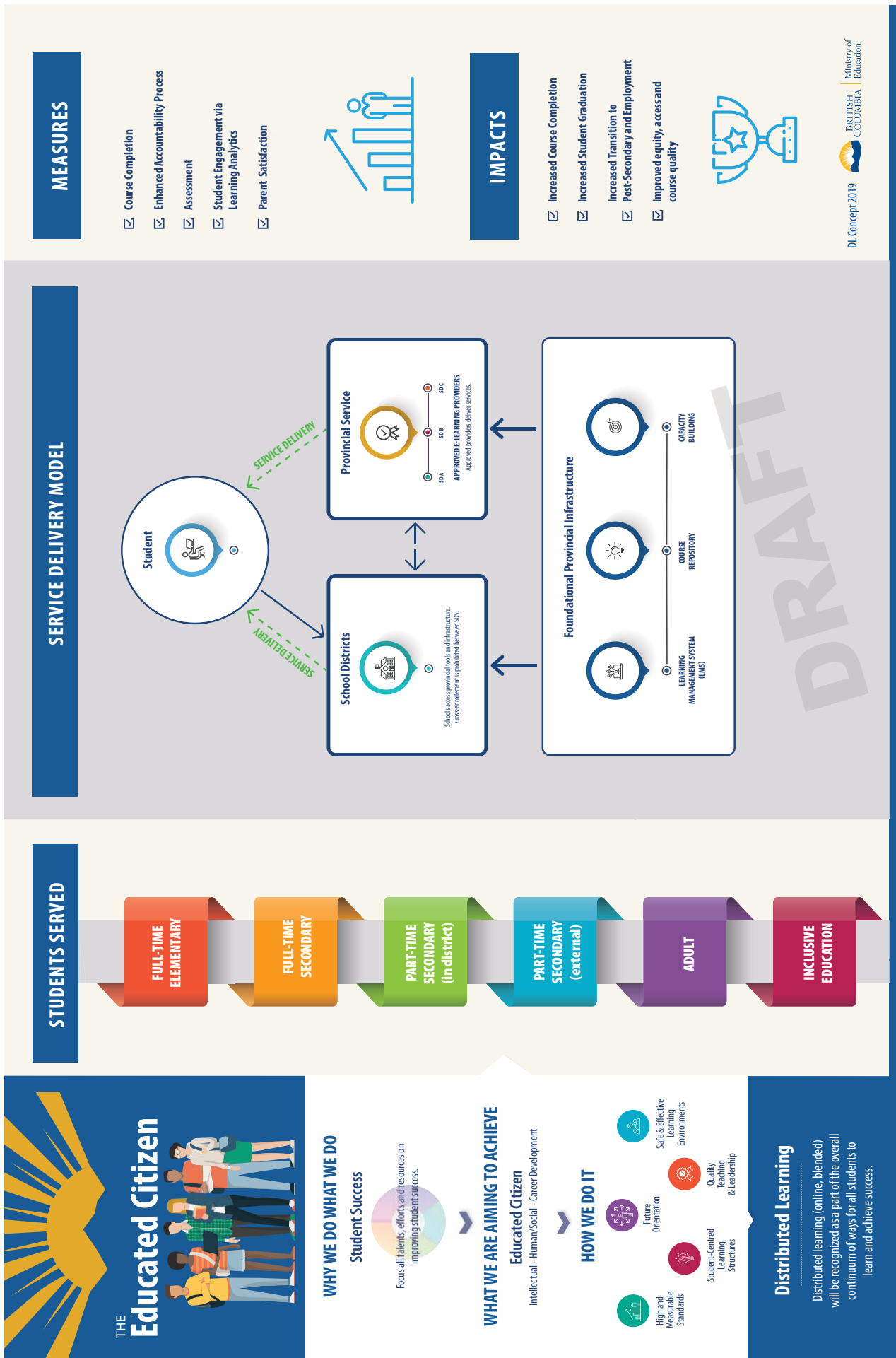
Future state learner journey



Line of interaction

The value theme refers to what the learner should feel as they progress through their learning experience





SERVICE DELIVERY MODEL

Student

School Districts

Provincial Service

Foundational Provincial Infrastructure

Service Delivery

Approved E-Learning Providers

Learning Management System (LMS)

Course Repository

Capacity Building

MEASURES

- ✓ Course Completion
- ✓ Enhanced Accountability Process
- ✓ Assessment
- ✓ Student Engagement via Learning Analytics
- ✓ Parent Satisfaction

IMPACTS

- ✓ Increased Course Completion
- ✓ Increased Student Graduation
- ✓ Increased Transition to Post-Secondary and Employment
- ✓ Improved equity, access and course quality

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Appendix E – Student Designation Analysis

High and Low Incidence Enrolments						
	2013/14	2014/15	2015/16	2016/17	2017/18	5 year growth %
Coquitlam	4,861.00	4,891.00	5,065.73	4,978.00	5,113.00	5.2%
Delta	2,151.00	2,120.00	2,167.38	2,080.00	2,116.00	-1.6%
North Vancouver	1,745.00	1,718.00	1,749.04	1,878.00	1,985.00	13.8%
Greater Victoria	2,165.00	2,125.00	2,160.93	2,202.00	2,361.00	9.1%
Langley	2,176.00	2,242.00	2,332.48	2,392.00	2,515.00	15.6%
Surrey	6,994.00	7,030.00	7,249.54	7,433.00	7,762.00	11.0%
Vancouver	5,295.00	5,235.00	5,322.22	5,147.00	5,383.00	1.7%
Central Okanagan	1,841.00	1,898.00	1,926.81	2,200.00	2,349.00	27.6%
Burnaby	2,143.00	2,131.00	2,219.68	2,190.00	2,302.00	7.4%
Abbotsford	1,711.00	1,724.00	1,749.27	1,808.00	1,847.00	7.9%
Richmond	1,645.00	1,583.00	1,599.66	1,480.00	1,517.00	-7.8%

Low Incidence Enrolments						
	2013/14	2014/15	2015/16	2016/17	2017/18	5 year growth %
Coquitlam	1,031.00	1,067.00	1,179.00	1,220.00	1,302.00	26.3%
Delta	883.00	939.00	994.00	1,012.00	1,050.00	18.9%
North Vancouver	586.00	594.00	646.00	662.00	664.00	13.3%
Greater Victoria	929.00	980.00	1,021.00	1,117.00	1,216.00	30.9%
Langley	875.00	937.00	958.00	1,034.00	1,122.00	28.2%
Surrey	3,170.00	3,310.00	3,512.00	3,752.00	3,711.00	17.1%
Vancouver	2,361.00	2,373.00	2,376.00	2,267.00	2,473.00	4.7%
Central Okanagan	963.00	987.00	1,055.00	1,103.00	1,121.00	16.4%
Burnaby	945.00	959.00	1,040.00	1,062.00	1,124.00	18.9%
Abbotsford	881.00	894.00	953.00	1,067.00	1,104.00	25.3%
Richmond	751.00	720.00	701.00	702.00	731.00	-2.7%

Autism (G) Enrolments						
	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	5 year growth %
Coquitlam	383.00	417.00	440.00	461.00	527.00	37.6%
Delta	177.00	192.00	193.00	207.00	244.00	37.9%
North Vancouver	194.00	196.00	200.00	214.00	217.00	11.9%
Greater Victoria	328.00	354.00	363.00	367.00	398.00	21.3%
Langley	240.00	272.00	297.00	346.00	375.00	56.3%
Surrey	802.00	841.00	966.00	1,083.00	1,226.00	52.9%
Vancouver	677.00	713.00	737.00	757.00	847.00	25.1%
Central Okanagan	315.00	368.00	444.00	496.00	525.00	66.7%
Burnaby	339.00	363.00	393.00	423.00	469.00	38.3%
Abbotsford	196.00	199.00	204.00	213.00	250.00	27.6%
Richmond	280.00	297.00	301.00	310.00	338.00	20.7%