

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

CORE BELIEFS FOR FUNDING DISTRIBUTION

PLRD believes that:

- The Three-Year Plan provides the philosophy by which budget allocations will flow
- All aspects of divisional service delivery (instruction and supports of, facilities, transportation, governance and administration) will be relevant when considering the three focal areas as determined in the three year plan; teaching and learning, culture and health and wellness
- Equity of funding distribution does not mean equal; it will take into account various factors to determine allocation
- The responsibility for expending of funds should be delegated to sites and departments
- The allocation methodology and process will be transparent

FOUNDATIONAL STATEMENTS

1. In each community, all students will have access to programming that leads to graduation through a combination of delivery methods such as face-to-face, podding through video conferencing, and distance learning.
2. Students shall have the opportunity to be engaged in a variety of activities such as, CTS and off-campus education and extracurricular events.
3. Funding allocation shall ensure that a quality education is provided that reflects the needs of the students, the school and the Division.
4. The allocation formula provides sites with the flexibility to allocate funds to programs and services as they choose in order to meet the educational needs of students and address priorities.
5. Distribution will be equitable and will be based on consistent factors for all schools.
6. Targeted funding for provincial areas shall be spent in the area for which it was provided (PO&M, Transportation, FNMI, REACH, FRW, Inclusive Education, PUF etc.)
7. Divisionally delivered services will be managed by central services and funded at the level necessary to provide adequate supports to all levels of the organization.

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

GUIDING PRINCIPLES

1. Direct Instruction

- 1.1. School staffing will be reviewed annually to ensure a right-sized staffing mix. Staffing will be determined using the projected enrolment by grade and overarching principles of:

- a) the Alberta Commission on Learning (ACOL) guidelines,
- b) grade combination where numbers necessitate multi-graded classrooms ,
- c) pupil-teacher-ratio comparisons
- d) types of courses being delivered i.e. predominately academic, CTS, face-face, video-conferencing

Multi-grade classes in regular schools shall be maintained with combinations of three-grades or less, as enrolment necessitates for such arrangements. Multi-grade classrooms shall be supported with smaller student numbers or with additional educational assistant time as required.

Accommodations in staffing will be considered using these factors along with school community contextual factors.

- 1.2. Podding of schools with similar enrolments will occur using an enhanced focus on flexibility in meeting individual student needs. While the purpose of these groupings is meant to be used for planning the majority of programming, all schools are encouraged to take advantage of opportunities in program delivery at other schools, not necessarily in their pod, in order to better meet the needs of their students.

- Altario, Youngstown, BCCS
- Delia, Morrin
- JCC and Consort

The podding of classes will take advantage of expertise around the division to provide students with opportunities that they may not otherwise have. Services will be delivered using VC technology. Associated credits shall be allocated to the students' resident school.

- 1.3. For high school programs in Delia and Morrin Schools, a pupil-teacher ratio (PTR) of 17:1 will be used as a guideline for establishing the number of teachers needed to operate.

An 18:1 ratio will be used for Consort and 19:1 for J.C. Charyk.

- 1.4. A portion of the base instructional funding will be used to provide divisional services. This will ensure that adequate specialized resources are available to all schools in the division.

Services that are deemed as necessary will be funded on a priority basis and all remaining dollars will flow to the schools. The exception to this will be in summer

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

programs where costs are deducted from those CEU earnings prior to distribution i.e. Work Experience.

- 1.5. Every school will be provided with a minimum of 0.50 full-time equivalent (FTE) principal administrative time. Administrative tasks related to this allocation include all non-classroom teaching tasks such as work experience, counselling, RAP etc. and will not be considered direct instruction.

Principals in schools with an allocation of 1.0 FTE or greater are required to provide direct classroom instruction for a minimum of .25 FTE to ensure classroom connection.

- 1.6. Kindergarten hours will correspond to the funding level of 50% of full time hours. This will apply to student hours and staffing. The need for a designated kindergarten teacher will be determined annually based on enrolment projections and looking at primary grade combinations. A designated kindergarten teacher will be allocated to schools who have a minimum of 10 students in the class.
- 1.7. Teacher FTE assignments for special needs will be assessed annually by the superintendent to create equity.
- 1.8. A funding allocation to cover classroom resources will be made using a methodology that recognizes school enrolment and configuration. K-9 schools, who do not have the ability to generate CEU revenue, will receive an additional \$5,000 to ensure classroom resource needs are met.

2. Targeted Instructional Funding/Divisional Support

- 2.1. Inclusive education and PUF programming will be determined annually according to need. The inclusive education and PUF funding envelopes will be used to fund these programs. If funding is insufficient to support students, the pooled instructional funding or reserves will be utilized to fulfil needs.
- 2.2. Speech/Language/OT services will be funded through a reallocation of Regional Collaborative Service Delivery funds.
- 2.3. Professional Development
 - Support for teacher professional development on specialist councils will be maintained to ensure that focus on curriculum implementation is not lost.
 - A centrally managed pool for jurisdiction-wide PD will be maintained.
 - Non-general PD costs will be managed by the school where resources will be made available for all staffing groups by school admin.
 - All other professional development will occur on-line or in-house, with exceptions as approved.
- 2.4. Costs associated with recruitment, advertising, copiers, common software and insurance will be managed through a central pool using a portion of the base student operating grants.

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

- 2.5. Base student funding will be used to address the divisional focal points approved in the Three-Year Plan.
- 2.6. A holdback of 1% or less will be made available for the sole use of the superintendent to address mid-year pressures.

3. School Instructional Support

3.1. Secretarial, library and educational assistant support

- Front office support will be allocated using a weighted formula taking into account enrolment in the different divisions. No school will be allocated less than 1.0 FTE.
- Library support will be allocated using enrolment numbers as a guideline.
- General educational assistant support will be adjusted to ensure equity of allocation using pupil ratios in various divisions.

3.2. Career Counseling

Career counseling will be managed by the deputy superintendent with a total board funding of 1.2 FTE support staff within the schools that focus on career development. Each high school will have an allocation for support with the position at JCC taking a lead role. The Deputy will assess individual school needs throughout the year for appropriate levels of support and will advise the Board of forthcoming recommendations.

3.3. Program Specific Funding from External Providers

- Programs funded through external agencies will be maintained for the duration of the grant.
- Targeted funding received from external sources will be used solely for the purpose as identified in the funding parameters.

4. Divisional Supporting Services

Essential support services in all areas of the organization will be considered a priority and will work within set parameters. Uncontrollable costs and expenses of a fixed nature, i.e. fuel costs, utility costs etc., insurances, and other expenses required for basic operation will be fully funded through envelope funding and equity of opportunity grants. These supports will be funded to the level necessary to ensure safety and comfort for students and staff.

4.1. Transportation

- Busing will be provided in accordance with a 90 minutes maximum ride-time as per Board Policy 17, Student Transportation.
- Student transportation is an essential service and requires dedicated coordination in keeping with provincial standards.
- Operational expenses including fuel and safety related items will be fully funded.

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

- Preventative maintenance on all divisional vehicles will be maintained by the transportation department mechanics as per provincial standards and service manual requirements.
- Spare fleet requirements will be calculated based on days required for routine and non-routine maintenance on buses, with some consideration made for average field trip requests.

4.2. Operating & Maintenance

- All facilities operated by the Board will be maintained to provide the necessary standards of accommodation.
- A clean, healthy environment will be maintained and building envelope conditions will continue to be addressed.
- The Board supports the need for staff housing in our rural communities and shall continue to maintain and enhance the existing structures.
- Facilities will be maintained in accordance with facility audit guidelines by using capital reserves and Infrastructure Maintenance and Renewal (IMR) funds.
- The current standards of school maintenance that include mandatory preventative maintenance, urgent and emergent requests, and requests for non-essential facility changes will be reviewed and prioritized. These items will be prioritized as follows and may result in rejection or significant delay of a request:
 - a) Safety items/issues
 - b) Emergent repairs
 - c) Mandatory preventative maintenance on building plants
 - d) Educational Delivery Needs
 - e) IMR projects
 - f) Building envelope projects
 - g) Enhanced functionality requests
 - h) Cosmetic and non-essential items

5. **Accumulated Surplus (Reserve)**

Maintaining a mix of operating and capital reserves is essential to the financial health of an organization. PLRD has reserves for several reasons; to manage cash flow, mitigate volatility in funding, address unexpected costs and save for large purchases. It would be advisable that operational reserves are not allowed to decline below 5% of operating revenue. Using current revenue projections as a base this would amount to a minimum operating reserve of \$1,250,000.

With the September 1, 2017 accumulated operating surplus totaling \$2.921 million (11.6% of revenue), PLRD would have approximately \$1.6 million in excess operational reserves if using a minimum reserve of 5%. The 2017-18 budgeted deficit

PLRD FUNDING DISTRIBUTION – BELIEFS & PRINCIPLES

of \$487,000 will ultimately decrease the operating reserve to \$2.4 million, leaving approximately \$1.2 million to draw upon.

Drawing down these reserves over the next four (4) years in order to minimize staffing disruptions and deal with escalating costs would be reasonable. (maximum of \$300,000 deficit per year).

One-time costs/initiatives can play a significant role in the use of funds. This drawdown must be approached in a thoughtful manner as we should be cognizant of the continuing costs associated with our commitments.

Capital reserves are set aside for unsupported (non-funded) future new or replacement items that exceed a per item cost of \$5,000. PLRD currently has \$10.9 million in unsupported assets. Using an average lifespan of 10 years capital expenditures should average \$1,090,000/year to maintain equipment and furnishings at optimum condition. Average capital investment over the past few years has been in the \$500,000 range, approximately one-half of suggested capitalization.

Our level of capital reserves at September 1, 2017 was \$2.07 million with annual depreciation expense being added to the fund in the amount of \$530k (2017-2018). This allocation would not meet the needs of the 10-year average plan and operating reserves may need to be accessed in high need years.