

Principles for the Basis of Allocations



2009-2010



**Greater St. Albert Catholic
Regional Division No. 29**



PRINCIPLES FOR THE BASIS OF ALLOCATIONS

The Principles for the Basis of Allocations flow from the foundational statements of the Division and are grounded in the Catholic Christian understanding of the common good. The two essential components of the common good are subsidiarity and solidarity. By subsidiarity, it is understood that decisions are best made by those persons closest to the source where such decisions will be applied. However, while the Principles acknowledge the benefit of site-based management, they also honor the need for solidarity among our schools. Consequently, from time-to-time, adjustments to the site-based and the Division's budgets may be required to facilitate prudent fiscal stewardship of the Division.

SITE-BASED DECISION MAKING

- ◆ The Board of Trustees is responsible for allocating funds to ensure the success of all students on an equitable basis. Each site shall deploy its funds based on a strategy that best suits its school community, keeping in mind the following:
 - a) Site-based decision making is defined as a process for allowing appropriate responsibility and accountability for decisions to the stakeholders at the site level. The concept of site-based decision making is based on a strategy that those most closely connected with the education of children are capable, can be trusted and are ultimately responsible for making decisions that affect the school lives of students. The process of bringing together all stakeholders, staff, students, parents, church, and community members should have the effect of releasing the boundless energy, dedication and creativity of those people who function closest to the implementation of the learning and teaching process.
 - b) The site-based decision making process is incorporated into the comprehensive Division Leadership Framework document. The Superintendent or designate will, as a part of a renewal process, review all dimensions of the framework and make any refinements necessary.
 - c) The Division believes that given an appropriate level of authority and resources, site-based decision making will enhance student achievement and increase the effectiveness and efficiency of the delivery of the school's instructional program.

IMPLEMENTATION OF SITE-BASED DECISION MAKING

- ◆ The implementation of site-based decision making requires the sites to meet the following legal conditions:
 - a) Provincial statutes and regulations;
 - b) School board policies and administrative procedures;
 - c) All contracts and terms of employment; and
 - d) School board resolutions

- ◆ The Principal of the school shall be responsible and accountable to the Superintendent for the implementation of site-based decision making at the school level.

SITE-BASED BUDGET ALLOCATIONS

- ◆ Site-based budget allocations will be subject to the following provisions:
 - a) That allocations be provided to elementary, middle years, and junior high school sites, based on approved class size standards for Kindergarten to Grade 9. Funding will be based on full-time equivalent (FTE) teachers required to achieve the class size standard at each grade level according to established average teacher salary as determined by the Finance Department.
 - b) That allocations be provided to high school sites based on actual credit enrollment units (CEU's) achieved by Grades 10 to 12. The allocation will be based on CEU's achieved from regular programming, pre-approved evening credit programming, and work experience. CEU's generated from pre-approved summer programming will be pooled divisionally and redistributed, after expenses, to high schools on an equitable basis.
 - c) That funding available for site-based allocations is subject to a 4% reduction for Division administration and may include the following categories:
 - Base Instruction (ECS, Grades 1 to 9, Grades 10 to 12, and Outreach)
 - First Nation, Métis, Inuit Funding (FNMI)
 - Socio Economic Status Funding
 - Growth and Decline Funding
 - Intra-jurisdictional Distance Funding
 - Small School by Necessity Funding
 - Stabilization Funding
 - Daily Physical Activity Funding
 - Class Size Funding
 - Federal French Funding
 - Alexander First Nations Tuition (as per invoice)



- Learning Resource Fee (and other fees collected by schools)
- d) That funding received for specific programs is not available for classroom use, but is subject to a 4% reduction for Division administration and may include the following categories:
- Home Education
 - English as a Second Language
 - ECS Mild and Moderate Special Needs
 - Student Transportation (including parent fees)
 - Fuel Initiatives
 - High Speed Networking and/or Video Conferencing
 - Plant Operations and Maintenance
 - Infrastructure Maintenance Renewal (IMR)
 - Supported Capital Interest
 - Interest on Investment
 - Capital Allocations
 - Net School Generated Funds
 - Revenue for Other Jurisdictions
- e) That the only funding not subject to a 4% reduction for Division administration are those funds received for special initiatives such as:
- Student Health Initiative
 - Program Unit Funding
 - Alberta Initiative for School Improvement (AIS) Program
 - Learning Resources Credit
 - Xerox External Service
- f) That the primary collection site for all enrolments will be MyBudgetFile (MBF).
- g) That the preliminary site-based budget is based on enrolment/CEU projections confirmed by the school on or prior to specific deadlines communicated by the Secretary-Treasurer. The MBF budget will be closed according to established timelines to maintain the information and support the Spring Budget submission to Alberta Education. Subsequent working budgets will be made available for school input from time to time, thereafter.
- h) That the operating site-based budget is based on actual enrolments confirmed by the school on or prior to September 30th of each school year. The budget will be closed in mid-October and remain closed for the duration of the semester. A final budget will be available in mid-February for updating semester CEU results and other small modifications.
- i) That the final site-based budget will be available in mid-February and likely remain open to allow ample time for schools and division office to finalize details.



This budget will confirm results and include minor adjustments necessary at the high school level. Any adjustments after closing will be reflected in the variance between budget and actual results.

ALLOCATION MODEL

- ◆ The allocation model, based on Board approved class size standards, reflects the belief that some efficiency is attained through centralization. As such, the funding for diverse needs staffing (certified and support) will remain under the direction of the Assistant Superintendent of Learning Services or designate to provide consistency of programming and services in all schools. Funding for this purpose will consist of the Severe Disabilities amount received from Alberta Education as per the Division's Severe Profile and further funding will be made available to the central diverse needs pool at a rate per FTE student (or equivalent CEU funding), specified in the addendum.

The allocation model will consist of the following components:

- a) Governance and Administration – will be a maximum of 4% of all funding.
- b) Operating Reserves – to be established by any available divisional operating surplus, reviewed on an annual basis, with a goal to build the fund to approximate 2.5% of annual revenues when fully funded. The operating reserves will be used to address unforeseen growth and decline circumstances in the Division.
- c) Centralized Needs for Instructional Services – this component recognizes the additional support required to effectively carry out the mandate of the Board. These programs currently are:
 - Curriculum and Language Services
 - Religious Education Services
 - Learning Technology Services
 - Diverse Needs Services, including a team of Counselors
 - CCLC; LPS; Administrators Retreat
 - Staff Development Committee, Course Reimbursement, Long Service Awards, EAP Services, AB Regional Consortium
 - Blueprints Day Expenses
 - Insurance
 - Personnel Contingency Fund
- d) Division Funded Programming – this component recognizes the additional support required to effectively offer the specific programming at a school. These programs currently are:
 - Junior and Senior High International Baccalaureate Programming
 - Elementary Learning Through the Arts Programming



- e) For budget allocation purposes only, St. Albert Catholic High School (SACHS) will be designated as a high school in its entirety.
- f) For budget allocation purposes only, Morinville Community High School (MCHS) will be designated as a high school for the Grade 10 to 12 population and as a modified junior high school for the Grade 9 population. A modified junior high will receive proportionate Kindergarten to Grade 9 funding based on the ratio of students in Grade 9 compared to the whole school population, according to the established standards to follow. Teacher preparation time for both divisions (junior and senior) will be allocated at 12.5% to recognize the staffing of the entire school is in accordance with 1,000 hours of annual instruction.
- g) For budget allocation purposes only, École Secondaire Ste. Marguerite d'Youville (ESSMY) will be designated as junior high school for the Grade 7 to 9 population and as a high school for the Grade 10 to 12 population, however teacher preparation time for both divisions (junior and senior) will be allocated at 12.5% to recognize the staffing of the entire school is in accordance with 1,000 hours of annual instruction.
- h) High schools will be funded by taking the Alberta Education CEU rate, subtracting 4% for administration, subtracting a further equivalent CEU rate for centralized instruction requirements, and yet another equivalent CEU rate for diverse needs.
- i) The funding for the certificated staff allocation (K to 9) will be allocated based on the latest Division average available for teacher salary and benefits, times the required teacher FTE, determined by the application of the Board approved class size standard to the grade population, as directed by the Deputy Superintendent in consultation with school administration. The certificated staff allocation (K to 9) will also include the actual amount of any contractual certified allowances for the Principal, the Vice-Principal, and any eligible Religious Studies teachers. All other allowances are considered site-based decisions and must be funded from all other allocations. The Division average for teacher salary and benefits may be modified from time to time, as necessary, to reflect negotiated increases. The Board approved class size standard is outlined below, but may be modified as necessary.

- ECS to Grade 3 20.0 students
- Grade 4 to 6 24.5 students
- Grade 7 to 9 26.5 students

- j) All K to 9 sites will receive an allocation for school based administration, as part of their certified FTE, based on the following schedule:

- 0 – 400 1.5 FTE
- 401-700 2.0 FTE
- 701 + 2.5 FTE



- k) All K to 9 sites will receive an allocation for a 1.0 FTE Library Tech position, based on the current grid maximum, using 6.5 hours and 10 months, including benefits @ 30%. Sites will have flexibility in the deployment of the funding to best meet the needs of their school community. It is the responsibility of school administration to ensure a minimum of at least a 0.5 Library Tech position at their site.

- l) All K to 9 sites will receive an allocation for secretarial support, based on the current grid maximum (average for SOS I & SOS II) and 10.5 months, including benefits @ 30%:
 - 0 – 300 1.5 FTE
 - 301-450 2.0 FTE
 - 451-600 2.5 FTE
 - 601+ 3.0 FTE

- m) All K to 9 sites, except a modified junior high school, will receive a substitute allocation based on 2% of all funded staffing allocations, including certified, support, Library Tech, and allowances.

- n) All K to 9, modified junior high, and high school sites (not including Learner Centres) will receive an allocation for supplies and services distributed on a per student basis, specified in the addendum.

- o) All French Immersion sites (École Father Jan, École Marie Poburan, École Georges P. Vanier, École Georges H. Primeau, École Secondaire Ste. Marguerite d'Youville) will receive an allocation for resources distributed a rate specified in the addendum per each Grade 1-12 student.

- p) All dual track French Immersion sites (École Georges P. Vanier and École Georges H. Primeau) will receive a grade level funding allocation as specified in the addendum.

- q) All sites, including Learner Centres, will be required to submit a balanced budget subject to a cap on contracted services and general supplies of 10% on total deployment. Exceptions must be approved in writing by the Secretary-Treasurer.

- r) Any unplanned site operating surplus will be automatically applied to offset any other divisional deficit before being considered for contribution to the operating reserves.

- s) Any site operating deficit must be covered by available school generated funds, as determined collaboratively between school administration and the Finance Department. If available funds are not sufficient to cover the operating deficit, then the remaining amount will be automatically applied to the following school year as a reduction to the subsequent site allocation.



FEES

- ◆ Board directed fees are specified for ECS and learning resources. These fees are collected at the school level and forwarded to Division Office for inclusion in the overall budget. The fees are charged to support the purchase of instructional materials and supplies. See the attached addendum for rates.
- ◆ The out-of-province annual tuition fees are determined by the Secretary-Treasurer and specified in the attached addendum. All out-of-province tuition fees must be administered through the Finance Department at Division Office by September 30th of each year and are subject to the withholding of 4% for Division administration.

FUNDING

- ◆ A central fund at Division Office may be established for the purpose of enhancing the Catholic Christian Dimension of our Division. The amount may be modified as required by the Central Office Leadership Team and specified in the addendum.
- ◆ A central fund at Division Office may be established for the purpose of alleviating financial pressures of new curriculum implementation. The amount may be modified as required by the Central Office Leadership Team and specified in the addendum.
- ◆ Funding will be provided for the iLEARN centre to promote the distributed learning model at all high school sites and specified in the addendum.
- ◆ Any request for special consideration funding to address class size issues or any other programming needs must be made in writing and include educational justification for all requested dollars. The written plan should be endorsed by the school community, including parents and staff, and should only be exercised after all other potential sources of funding (for example, school generated funds reserves) have been exhausted. Funds available for this purpose will be specified in the addendum.

All requests will be reviewed by the senior administration team at Division Office and if the interest of the greater school community is enhanced then the request will be recommended to the Allocations Committee for review and approval.

All approvals will be confirmed by the Secretary-Treasurer. Schools should keep a copy of the approval in their files.

- ◆ Guiding Principles for Division funded programming must meet the following criteria:
 - a) The program or initiative must be supportive of the foundational statements (mission, values and vision) of Greater St. Albert Catholic Schools.



- b) The primary benefactors of the program or initiative must be the students of Greater St. Albert Catholic Schools.
- c) The program or initiative is not financially sustainable within the *Principles of the Basis of Allocations*, as revised from year to year. As a result, consideration may be given under Division funded programming to cover costs such as external licensing, exam fees, and/or certification obligations.
- d) The program or initiative is not part of the funded core and optional curricula of Alberta Education.
- e) The program or initiative may be established by a directive of the Board of Trustees.
- f) The program or initiative must serve the common good of the Division, even though it may be location specific.
- g) The program or initiative advances the Three-Year Education Plan of the Division, for example, faith formation, special needs programming, gifted education, language learning, and distributed learning.
- h) Consideration will be given to programs or initiatives that were implemented prior to the determination of the guiding principles and for which the cessation of such programs or initiatives is likely to cause irreparable harm to the integrity of Greater St. Albert Catholic Schools.



Fees Addendum

<i>Description</i>	<i>2009-2010</i>
<i>ECS Fees</i>	\$130.00
<i>Learning Resource Fee</i> <i>(formerly known as Textbook Rental Fee)</i>	
<i>Grade 1 - 6</i>	\$60.00
<i>Grade 7 - 9</i>	\$70.00
<i>Grade 10 - 12</i>	\$80.00
<i>Out-of-Province Tuition Fees per annum</i> <i>(may be pro-rated monthly)</i>	
<i>Grade 1 - 9</i>	\$7,000.00
<i>Grade 10 - 12</i>	\$10,000.00



School Allocations Addendum

<i>Description</i>	<i>2009-2010</i>
<i>Board Approved Class Size Standard</i>	
<i>ECS – Grade 3</i>	<i>20.0</i>
<i>Grade 4 – Grade 6</i>	<i>24.5</i>
<i>Grade 7 - 9</i>	<i>26.5</i>
<i>High School CEU Allocation Rate</i>	
	<i>\$128.36</i>
<i>Diverse Needs Mild/Moderate Transfer (K-12)</i> <i>(not including iLEARN students)</i>	
	<i>\$825/FTE</i> <i>\$23.57/CEU</i>
<i>Centralized Needs per FTE (K-12)</i>	
	<i>\$414.71</i>
<i>Centralized Needs per CEU (10-12)</i>	
	<i>\$11.85</i>
<i>Supplies & Services Allocation Rate</i>	
<i>ECS (per student)</i>	<i>\$175</i>
<i>Grades 1 - 6</i>	<i>\$345</i>
<i>Grades 7 - 12</i>	<i>\$420</i>
<i>French Immersion Resource Allocation</i> <i>(per student: Gr 1-12)</i>	
	<i>\$50</i>
<i>Dual Track Grade Level Allocation</i>	
	<i>\$13,500</i>
<i>Divisional Catholic /Christian Dimension Fund</i>	
	<i>\$110,000</i>
<i>Division Funded Programming (IB, LTTA, etc)</i>	
	<i>\$130,000</i>
<i>iLEARN Centre Funding</i>	
	<i>\$1,000,000</i>
<i>Staffing Contingency Fund (min)</i>	
	<i>\$250,000</i>

