

Principles for the



Basis of Allocations to SCHOOLS

2015-2016 – FINAL REVISED



Greater St. Albert Roman Catholic
Separate School District No. 734
FINAL R– presented to Trustees June 29, 2015

PRINCIPLES FOR THE BASIS OF ALLOCATIONS

The Principles for the Basis of Allocations flow from the foundational statements of the District and are grounded in the Catholic understanding of the common good. The three essential components of the common good are subsidiarity, solidarity, and socialization. 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, assuming that all areas of financial allocation in the District have a shared role in serving the needs of students. Finally, socialization is deemed to be the value that bridges the two previous components together. It assumes that all who work on behalf of students must be active in demonstrating behaviors that support each other with respect to the interdependent nature of everyone working for the needs of all students. Consequently, from time-to-time, adjustments to the student-based and the District's budgets may be required to facilitate prudent fiscal stewardship of the District.

OVERALL BUDGET PRINCIPLES

All Schools and Departments will:

- Be responsive to programming needs that enable students to meet the Standards of Education prescribed by the Minister of Education
- Ensure that K-12 Religious Education may be part of a student's program plan, to thrive both intellectually and spiritually
- Develop program plans and pedagogy that places students in the centre and in charge of the learning process
- Make efforts to transition away from a traditional library toward a learning commons environment which promotes an inclusive, flexible, learner-centered, physical and/or virtual space for collaboration, inquiry, imagination and play to expand and deepen learning for individual students and groups
- Deploy technology supporting pedagogy that improves learning for all students
- Support targeted and specific intervention plans for FNMI learners with the differentiated FNMI grant dollars provided
- Further "best practices" and efficiencies in achieving outcomes so that optimal service can be provided to all students
- Support learning environments that are safe, happy, and healthy so students can learn, live fully, and serve others

BUDGET PROCESS AND THE DETERMINATION OF ALLOCATIONS BY ENVELOPE

- ◆ The Board of Trustees is responsible for the success of all students on an equitable basis. Each site shall deploy its resources based on a strategy that best suits its school community through the development of an Organizing for Learning Plan for the purposes of identification of staffing needs.
- ◆ The District's annual budget process for the next school year begins in November of each year with confirmation of the current year's funding, which will be used as a comparison to the estimated revenues anticipated for the following year with NO increase in rates.
- ◆ All expected funding is categorized into 3 basic areas:
 1. Targeted Funding, with specific reporting requirements and not directly available for general instruction such as:
 - Program Unit Funding
 - External Services
 - Donations specific to School Generated Funds
 - Secondments (placement of staff with external agencies)
 2. Other Funding, directed to specific areas such as:
 - Operations and Maintenance / Capital Allocations
 - Transportation
 - Governance and Administration
 - Other Specific Amounts for Instruction (i.e. Home Education, English as a Second Language, FMNI, One-time Grants, Federal Funding, and instructional funds that will be allocated outside the classroom funding allocation model according to need).All funds in these categories are expected to have balanced budgets (Revenues less 3.6% = Expenditures)
 3. K-12 Instruction to Schools – funds available for directly funding the classroom that include the following:
 - Basic Instruction Rate (K-9)
 - Class Size Base Rate (K-3)
 - Earned Credit Enrollment Units (CEU's) Tiers 1-4 (10-12)
 - High School Flexible Funding (three-year average)
 - Socio-Economic Status Rate
- ◆ Enrolment projections are developed by the Secretary-Treasurer in conjunction with Principals, including the application of average entrance and retention rates to specific programs for planning purposes. Initial projections are conservative and based on the last three to five year average enrolment in Kindergarten and the roll-over of all other grades.
- ◆ These conservative projections are then forwarded to schools for comment.
- ◆ Funding for staffing is held centrally at the district level.



- ◆ Funding for supplies and services is provided directly to school sites for management by the School Principal.
- ◆ Certain costs are managed at the central level to benefit all students as outlined in the Centralized Needs Addendum on page 10.

STUDENT-BASED DECISION MAKING

- ◆ Each site Principal shall deploy assigned Allocations (either an FTE for staff or funding for supplies and services) based on a strategy that best suits its school community, keeping in mind the following:
 - a) Student-based decision making is defined as a process for allowing appropriate responsibility and accountability for decisions to the stakeholders at the school level. The concept of student-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.
- ◆ The District believes that given an appropriate level of authority and resources, student-based decision making will enhance student achievement and increase the effectiveness and efficiency of the delivery of the school's instructional program.

IMPLEMENTATION OF STUDENT-BASED DECISION MAKING

- ◆ The implementation of student-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 student-based decision making at the school level.



STUDENT-BASED BUDGET ALLOCATIONS

- ◆ All site Principals will play a key role in determining the staffing requirements at their sites, but the funding for staffing will remain in a central fund for monitoring purposes. FTE staffing allocations will be provided as follows:
 - a) To elementary, middle years, junior, and senior high school sites, based on Board approved class size standards for Kindergarten to Grade 12. Funding will remain at the District level while the allocations to schools 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 from year to year.
- ◆ Site-based budgets for all schools will be limited to supplies and services and the following procedures will aid in transparency and accountability:
 - a) The primary collection site for all enrolments will be MyBudgetFile (MBF).
 - b) The specified MBF budget will be closed according to established timelines to maintain the information and support the Budget submission to Alberta Education. Subsequent working budgets will be made available thereafter for school input, from time to time.
 - c) The student-based operating supplies and services budget is based on actual enrolments confirmed by the school on 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.
 - i) The final student-based budget will be available in mid-February, and remain open to allow ample time for schools and District office to finalize details. This budget will confirm results and include minor adjustments necessary. Any adjustments after closing will be reflected in the variance between budget and actual results.
- ◆ Independent iLRN Centres will exist at SACHS and MCHS, while ESSMY may be part of St. Gabriel High School. This model may be modified, as required, by the Secretary Treasurer and any modifications shall be reported to the Board.

SCHOOL ALLOCATION MODEL

- ◆ The monitoring of funding for all diverse needs staff (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 Inclusive Education Grant received from Alberta Education as per the



District's Profile and any further funding made available to the central diverse needs pool at a rate per FTE as specified in the addendum.

◆ Initial FTE allocations for staff will be based on enrollments confirmed on September 30th. The final FTE Allocations will be based on the Organizing for Learning Plan submitted, reviewed, and approved.

a) For FTE allocation purposes only, St. Albert Catholic High School (SACHS), Morinville Community High School (MCHS), École Secondaire Ste. Marguerite d'Youville (ESSMY) will all be designated as a high school. Teacher preparation time for both junior (grade 7-9) and senior (grades 10-12) components that exist at a school will be allocated preparation time at 12.5% to recognize the staffing of the entire school is in accordance with 1,000 hours of annual instruction.

b) The FTE allocation for certificated staff (K to 12) will be based on the latest District average teacher salary and benefit cost, times the required teacher FTE determined by the application of the Board approved class size standard to the grade population, as directed by the Assistant Superintendent in consultation with school administration. The FTE allocation for certificated staff is a number rather than a dollar value. The certificated staff allocation (K to 12) 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 District 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, by a Board Motion.

◆ ECS to Grade 3	22.0 students
◆ Grade 4 to 6	26.0 students
◆ Grade 7 to 9	27.5 students
◆ Grade 10 to 12	28.0 students

c) All sites will receive an FTE 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

d) All sites will receive an allocation for a Learning Commons, based on a percentage of the established Teacher Average Salary & Benefit amount as specified in the addendum. 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 half the allocation provided is used to fund a Library Tech position or a Teacher position at their site's Learning Commons. Any funding not used to fund the Learning



Commons will be available to the school for supplies & services or supplemental Certified Staff.

- e) All 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%:

◆ 0-400	1.5 FTE
◆ 401-600	2.0 FTE
◆ 601-800	2.5 FTE
◆ 800+	3.0 FTE

- f) All high school sites will receive an allocation for a Business Manager, based on the current grid maximum for 10 months, including benefits @ 30%. It is up to site administration to deploy the allocation as is best suited to the school community.
- g) All sites will receive an allocation for supplies and services distributed on a per student basis, specified in the addendum.
- h) All French Immersion sites (École Father Jan, École Marie Poburan, École Georges H. Primeau, École Notre Dame, École Secondaire Ste. Marguerite d'Youville, St. Albert Catholic High School, and Morinville Community High School) will receive an allocation for resources distributed at the rate specified in the addendum per each "French" Grade 1-12 student.
- i) All dual track French Immersion sites (École Notre Dame, École Georges H. Primeau, MCHS, and SACHS) will receive an FTE allocation per grade level as specified in the addendum.
- j) All school budget sites will be required to submit a balanced budget. Exceptions must be approved in writing by the Secretary-Treasurer.
- k) Any site "operating surplus" will be automatically applied to offset any other District deficit before being considered for contribution to the accumulated operating reserves.
- l) 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", the remaining amount will be automatically applied to the following school year as a reduction to the subsequent year's available allocations.



FEES

- ◆ Board directed fees are specified for ECS and Learning Resources. These fees are collected at the school level and forwarded to District Office for inclusion in the overall budget. The fees are charged to support the purchase of instructional materials and supplies. ECS and Learning Resource fees are applied to General Revenue for the District as part of the funding source of the Student Supplies and Services Allocation. See the attached addendum for rates.
- ◆ The out-of-province annual tuition fees are determined by the Secretary-Treasurer, approved by the Board, and specified in the attached addendum. All out-of-province tuition fees must be administered through the Finance Department at District Office by September 30th of each year and are subject to the withholding of 3.6% for District administration.
- ◆ All school generated fees must be discussed at a school council meeting prior to May 1st of the school year prior to the school year in which the fee becomes effective. Evidence of discussion, by way of a meeting date, must be provided to the Secretary-Treasurer on an annual basis. Any change in fees must be substantiated by a demonstrated need, clearly outlined in writing, and approved by the Secretary Treasurer prior to being implemented. A summary of all school generated fees in support of the general curriculum must be submitted to the Secretary-Treasurer by May 15th and will be reported to the Board in summary fashion each year, prior to the start of the school year in which they apply.
- ◆ All extra-curricular fees, such as athletic team fees, should be communicated to parents and should be limited to operating expenses for the current season of the team. All fees will be shared with the school administration and forwarded to the Secretary-Treasurer as soon as they are set in any given school year. This information will be shared with the Board, as it becomes available.



OTHER FUNDING

- ◆ Guiding Principles for District funded programming such as the District Catholic Dimension Fund (Youth Ministry), International Baccalaureate Program (IB), Learning Through the Arts Program (LTTA), etc. 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 by a school within the *Principles of the Basis of Allocations to Schools*, as revised from year to year. As a result, consideration may be given under District 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 District, even though it may be location specific.
 - g) The program or initiative advances the Three-Year Education Plan of the District, 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.



2015-2016 Fees Addendum

<i>Description</i>	<i>2015-16</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>	\$100.00
<i>Out-of-Province Tuition Fees per annum</i> <i>(may be pro-rated monthly)</i>	
<i>Grade 1 - 12</i>	\$10,750.00

	2013-14	2014-15	2015-2016
Elementary Learning Resource Fee:	\$60.00	\$60.00	\$60.00 No Change
Junior High Learning Resource Fee:	\$70.00	\$70.00	\$70.00 No Change
Senior High Learning Resource Fee:	\$100.00	\$100.00	\$100.00 No Change
ECS Fee:	\$130.00	\$130.00	\$130.00 No Change
Out-of-Province Tuition Fees (gr.1-9)	\$7,000/yr.	\$7,500/yr.	\$10,750/yr. \$3,250 Increase
Out-of-Province Tuition Fees (gr.10-12)	\$10,000/yr.	\$10,750/yr.	\$10,750/yr. No Change



2015-2016 School Allocations Addendum

<i>Description</i>	<i>2015-16</i>
<i>Board Approved Class Size Standard</i>	
<i>ECS – Grade 3</i>	<i>22.0</i>
<i>Grade 4 – Grade 6</i>	<i>26.0</i>
<i>Grade 7 - Grade 9</i>	<i>27.5</i>
<i>Grade 10 – Grade 12</i>	<i>28.0</i>
<i>District Catholic Dimension Fund</i>	
	<i>\$136,950</i> <i>may be modified by the Superintendent</i>
<i>Supplies & Services Allocation Rate</i>	
<i>ECS (per student)</i>	<i>\$125</i>
<i>Grade 1 - 6</i>	<i>\$200</i>
<i>Grade 7 - 12</i>	<i>\$250</i>
<i>French Immersion Resource Allocation</i> <i>(per student: Grade 1-12)</i>	
	<i>\$50</i>
<i>Dual Track Grade Level FTE Allocation</i>	
	<i>.135 FTE per grade</i>
<i>District Funded Programming (IB & LTTA)</i>	
	<i>\$100,000</i>
<i>Fund For Professional Development, Licensing Fees, additional assessment etc. – to be shared among three schools.</i>	
<i>Average Teacher Salary & Benefit Allocation</i> <i>(subject to change on Sept 30th)</i>	
	<i>\$102,915</i> <i>(per FTE)</i>
<i>Learning Commons Allocation</i>	
	<i>\$53,000</i>
<i>(based on .515 FTE of Average Teacher Salary & Benefit Allocation)</i>	



2015-2016 Centralized Needs Addendum

Centralized Instruction Needs:	Budget Centre	Per Student Rate
Christ Centred Learning Community (CCLC)	Asst Superintendent	\$7.13
Leadership Programs & Services (LPS)	Asst Superintendent	\$1.40
Administrators Planning Retreat	Asst Superintendent	\$1.21
Staff Development Committee	Asst Superintendent	\$0.93
Employee Assistance Program Services	Human Resources	\$2.28
Employee Course Reimbursement	Human Resources	\$1.15
Gallup Student Insight & Staff Engagement Contracts	Human Resources	\$10.56
Long Service Awards	Superintendent	\$7.45
Blueprints (lunch /venue/speaker /misc)	Superintendent	\$3.17
Religion Services	Superintendent	\$29.61
District Catholic Dimension (Youth Ministry)	Finance	\$25.51
Insurance	Finance	\$15.31
Merchant/User Fee & MBF Expenses - Centralized	Finance	\$16.33
Personnel Contingency Fund	Human Resources	\$76.67
District Principal	Asst Superintendent	\$46.32
Tech Services	Asst Superintendent	\$166.70
Curriculum & Lang Services	Asst Superintendent	<u>\$52.71</u>
Sub-Total Centralized Needs:	Total per student:	\$464.44 (6.95% of the Basic Grant)
Contribution to Diverse Learning Needs (includes Counsellors & Learning Support Facilitators)		\$735.00 (11% of the Basic Grant)
2015-16 Basic Student Grant (grades 1-9)		\$6,679.79

Actual Budgets for the above departments will be adjusted based on confirmed Student Enrolment on September 30, 2015 and may differ from the June 2015-2016 Budget submitted.

