

# Budget Process 2017-2018 Stakeholder Consultation Guide

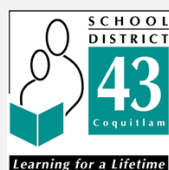
Spring 2017



## Learn. Engage. Contribute.

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*You Talk. We Listen.*



**School District No. 43 (Coquitlam)**

550 Poirier Street

Coquitlam, BC V3J 6A7

Phone: 604-939-9201 Fax: 604-939-7828

*Serving the communities of Anmore, Belcarra, Coquitlam, Port Coquitlam and Port Moody.*

## Message from the Board of Education

Welcome to the stakeholder consultation and engagement process for the 2017-2018 budget for School District No. 43 (Coquitlam).

We are the third largest school district in the Province of British Columbia, and as such we have a diverse population which includes young families, new Canadians, professionals and others who are choosing to locate here for the quality of life that includes a thriving public education system. We continue to excel on all student performance measures and our six year graduation rate is #1 in Metro Vancouver and #2 in the Province.

The Board of Education has again planned a consultative budget process for the 2017-2018 school year. The process will provide multiple opportunities for stakeholder input, starting in April 2017, once Ministry funding has been announced. We appreciate all comments and input while we work closely with our partner groups within the confines of our contracts and available resources.

The Board is committed to transparency and accountability and has developed a stable and sustainable proposed budget for 2017-18. The proposed budget provides for positive incremental changes to ensure long-term stability and sustainability. Through our ***Directions 2020*** developed goals and objectives we are committed to helping students achieve success, enhancing learning through technology, and fostering a sustainable educational organization - all within a changing landscape of provincial funding.

We invite you to **learn** about the budget process, **engage** in the consultation and **contribute** feedback. Help deepen our collective understanding and identify the challenges and opportunities. Share your ideas on how we can make the best use of the funds available for our children, families, employees and communities while advancing the School District towards our mission. Your input will help guide the Board's decisions and actions.

Sincerely,

Board of Education  
School District No. 43 (Coquitlam)

## Budget Process 2017-2018

The Board of Education is utilizing a comprehensive strategy to create the 2017-2018 budget.

### ***Our Goal***

*The Board of Education will embark on the budget process through a transparent, inclusive and accountable process that engages the community for input.*

- The first step of the strategy was to identify potential cost pressures as well as areas of possible financial surplus/deficit. For the 2017-2018 year, the Board has identified that they can deliver a stable and sustainable budget.
- The Board is consulting with stakeholders on how we can use available resources to continue to foster a high achieving and sustainable organization for many years to come.
- The preliminary budget process allows stakeholders to comment and provide suggestions on the proposed budget so that the Board of Education can consider these prior to finalizing the budget.

This budget strategy will consider:

### **Students first**

Aligning decisions with a thriving public education system for students is a community value. As stewards of public funds, the School District must demonstrate a financial commitment to improve the learning environment for students.

### **Fair access for all students**

Delivering fair, effective and positive learning environments for 31,000 students today and an additional 3,000 new students over the next decade is the School District's commitment. Present financial decisions must consider the current and future needs of students and employees.

### **Life-long learning in our communities**

Delivering life-long learning in our communities is part of the School District's vision. We envision high quality, diverse, personalized and enriched education opportunities for all students of all ages. Ongoing financial review and community engagement will support this.

### **Changing landscape of provincial funding**

Funding from the provincial government has not kept up with rising costs even with lower enrolments and increased per pupil funding. Additional cost pressures such as hydroelectricity, gas and health benefits have all increased, with school boards funding most of these.

### **Long-term Strategic Vision**

Aligning the budget process and connecting the allocation of resources with our strategic vision and goals as outlined in ***Directions 2020***, which was established by the Board of Education in the Fall of 2016.

## Directions 2020 Summary

At School District No. 43 (Coquitlam), it is our firm belief that the operation of the District is more effective with a clear vision and purpose that is aligned and integrated through all areas of the organization.

The goal of creating a unified vision has led us to develop *Directions 2020*, the fulfilment of the *Learning Without Boundaries* strategic framework that was created by our School District through consultation with and feedback from several thousand stakeholders.

This vision known as *Directions 2020* will direct and enable the:

- fulfillment of our mission and goals and provide direction for future plans;
- prioritization and articulation of annual priorities and allocation of resources; and
- effective communication of results to allow for reflection, feedback and ongoing enhancement.

### Our Mission

To ensure quality learning opportunities for all students of all ages.

### Strategic Goals

The fulfilment of the *Learning Without Boundaries* strategic framework has resulted in these three strategic high-level goals and several objectives.

#### Goal #1

**Achieve Student Success:** *Our core work and common goal is educational excellence.*

#### Goal #2

**Enhance Learning Through Technology:** *Cultivate the use of technology to improve learning and working experiences for all.*

#### Goal #3

**Foster a Sustainable Educational Organization:** *Ensure that our human, financial and physical resources are sustainable.*

Read the complete [Directions 2020 document here](#).



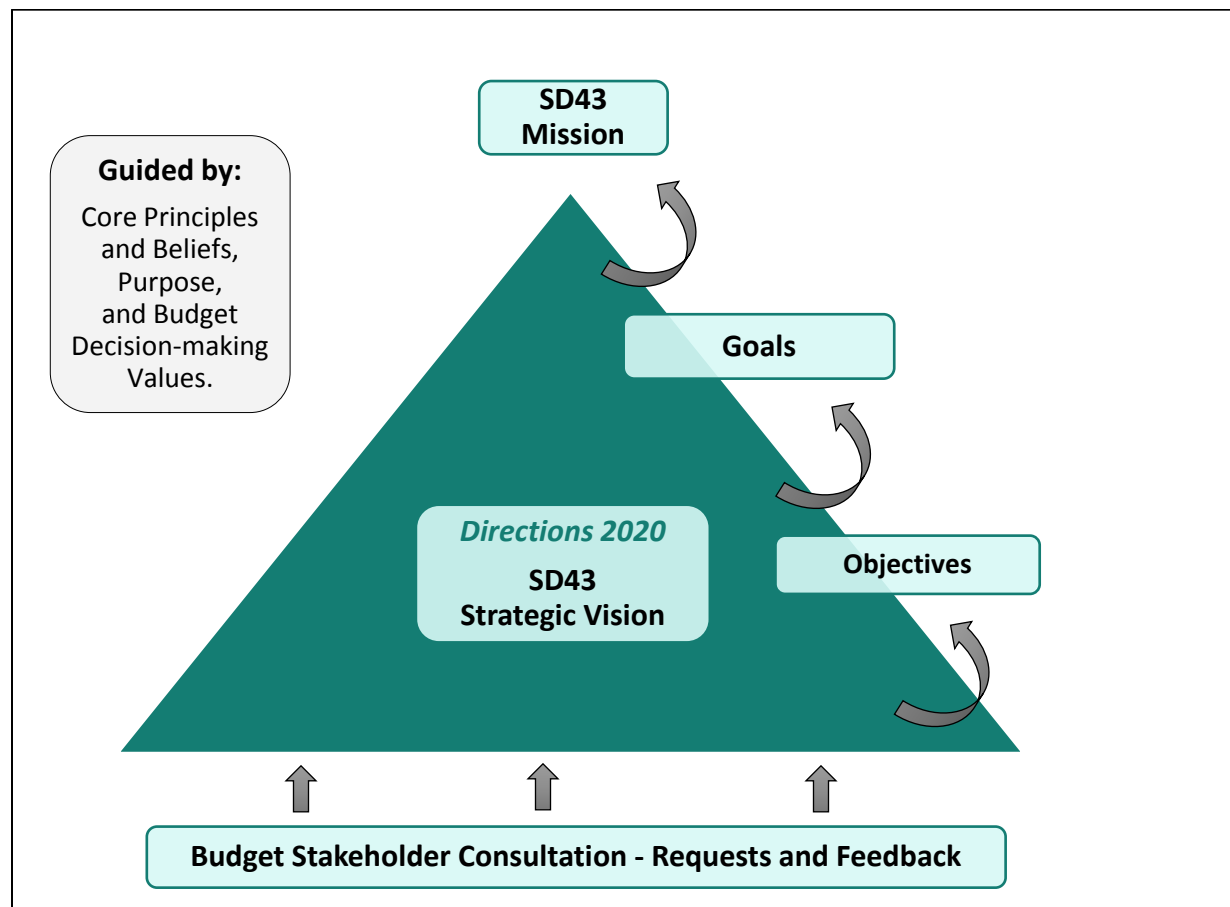
## Aligning Budget Planning and Resource Allocation with *Directions 2020*

The School District is committed to a model of transparent budget planning and resource allocation that is directly aligned with our strategic vision and goals, *Directions 2020*, established by the Board of Education.

It is a consultative model that coordinates budget planning and resource allocation activities with inclusive stakeholder consultation and feedback based on the vision, goals and objectives. The model includes:

- articulating *Directions 2020*;
- providing timely and accurate budget information;
- receiving budget requests and feedback;
- prioritizing budget requests for the upcoming budget year;
- allocating available resources to best meet requests that align with the vision, goals, and objectives;
- communicating the outcomes effectively for transparent accountability.

The model will ensure that budget requests and resource allocations are connected to and aligned with the *Directions 2020* vision, goals and objectives. This model will become an integral part of the School District's operating culture.








## The Difference Between Capital Budgets, Operating Budgets and Special Purpose Funds

As one of the major employers in the Lower Mainland, the Board of Education has a large and complex budget.

There are three separate sections of the budget. The following illustration shows what is funded from each section.

Operating Budget	Capital Budget	Special Purpose Funds
		
<ul style="list-style-type: none"><li>• Learning</li><li>• Teaching</li><li>• Programs</li><li>• Administration</li></ul>	<ul style="list-style-type: none"><li>• Buildings</li><li>• Fields</li><li>• Infrastructure</li></ul>	<ul style="list-style-type: none"><li>• Specific time frame (12 months, 24 months)</li><li>• Specific function</li><li>• Examples:<ul style="list-style-type: none"><li>○ Learning Improvement Fund</li><li>○ Annual Facilities Grant</li><li>○ Community Link</li></ul></li></ul>

*Image source: <http://wpmedia.business.financialpost.com/2014/01/money.jpg?w=620>*

The budget process focuses on areas where the Board of Education is able to make changes – within the operational budget.

Any funds within the capital budget may not be used for operational budget items.

Special purpose funds are for designated purposes which can supplement operational activities. That said, similar to capital funds, they may not be used for operational budget items.

## Budget Goals

The School District has as its budget objective the aim of providing long-term stability and sustainability through multi-year financial planning.

**Carefully planned and responsible multi-year changes in measured amounts allow for long-term budget stability and sustainability.**

- Allows for long-term sustainable planned budget additions
- Smooths large fluctuations in budget changes
- Helps manage unforeseen funding risks

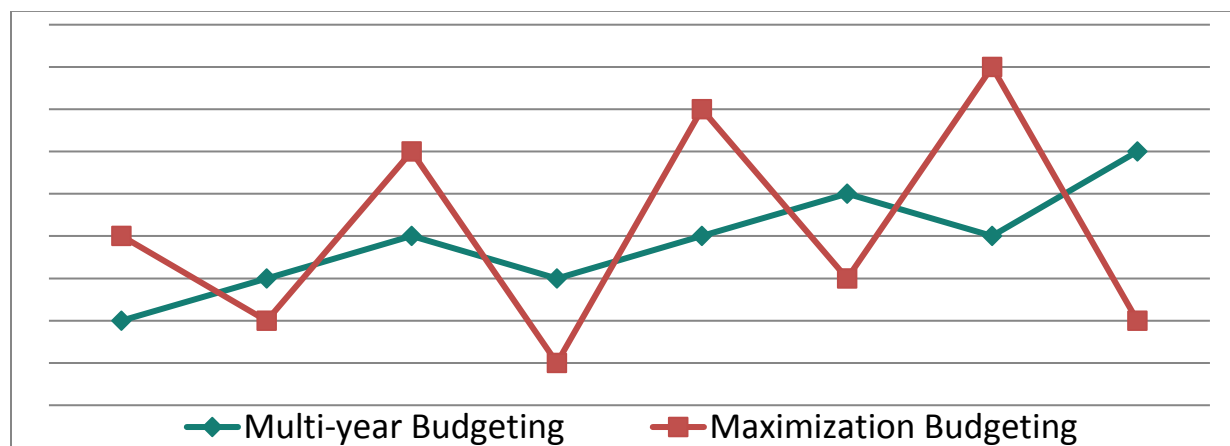
**More funding for schools to support and enhance teaching and learning.**



School District budgeting is extremely complex due to the lack of multi-year funding certainty, limited Ministry funding for inflation, and the frequent adoption of new and unfunded initiatives.

Multi-year financial planning is a strategic budget management method of making carefully planned and responsible changes in measured amounts over several years to smooth out large fluctuations in year-to-year resource additions or reductions due to unforeseen costs and other circumstances.

Multi-year financial planning as a budgeting framework will build the School District' long-term stable financial position, help manage future risks from unforeseen situations, and most importantly allow for the planning of ongoing responsible and sustainable positive changes to the education system.

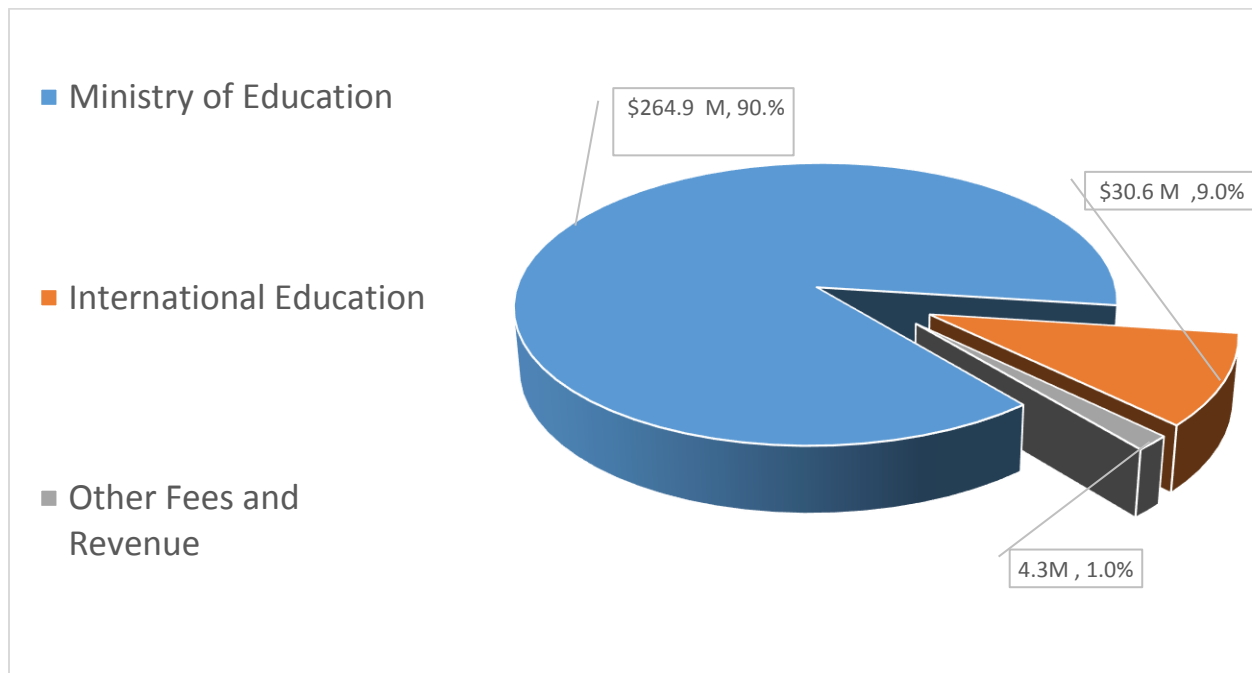


As shown in red in the graph above, maximizing an annual budget surplus each year can lead to a pattern of adding and cutting resources which creates an unstable and uncertain education system for students, parents, and employees. As shown in green, a multi-year distribution of annual budget surplus over the medium term helps to smooth funding changes and avoid sudden and frequent program changes.

## Make up of a School District Operational Budget

The operating budget in 2016-2017 was \$297.9 million. As the chart below shows, the majority of this funding, 88.6%, comes from the Ministry of Education.

### Coquitlam School District Sources of Revenue 2016-2017





## Funding

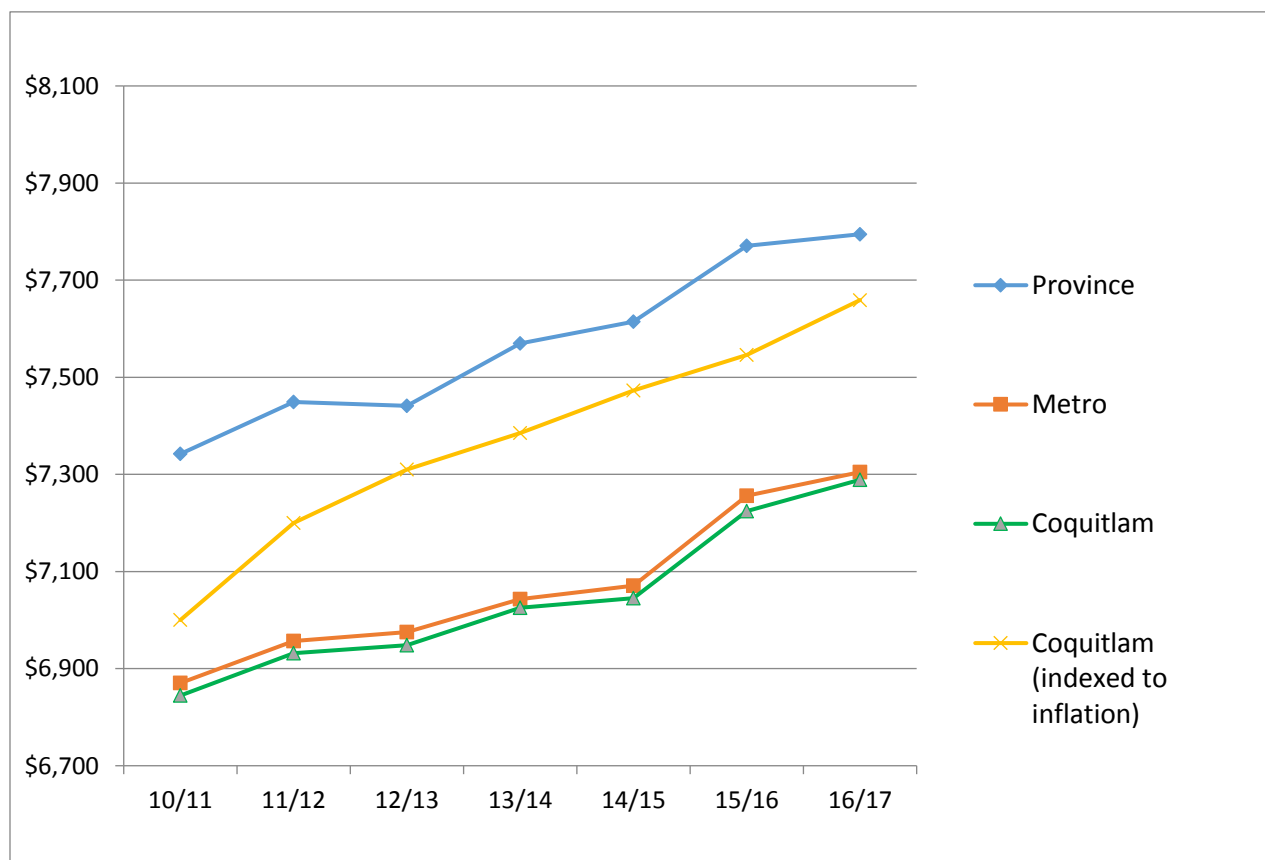
The basic student operating grant allocation for 2016-2017 is \$7,218 per FTE student. Coquitlam, like other school districts, also receives additional fund for unique student and school district factors.

Provincial funding however has not kept up with inflation. Further, there are 19 out of 60 school districts which are reporting declining enrolment and/or qualify for funding protection. These school districts receive an additional \$21.3 million in support. The Coquitlam School District is funded \$1.2 million less due to funding protection for other districts.

SD43 ranks 56<sup>th</sup> in funding out of 60 school districts for 2016-17.

In terms of funding for 2016-17, SD43 currently receives \$7,289 per student (excluding special student needs and salary differential factors) while the provincial average is \$7,795 per student. This difference of \$506 per student is significant considering that there are approximately 31,000 students in the district.

This trend is not new and the chart below shows how funding per student has not kept up with costs in recent years. If total grants had kept up with inflation since 2009-2010, SD43 would have received \$7,659 per student. The difference of \$370 per student equates to approximately \$11 million funding shortfall.



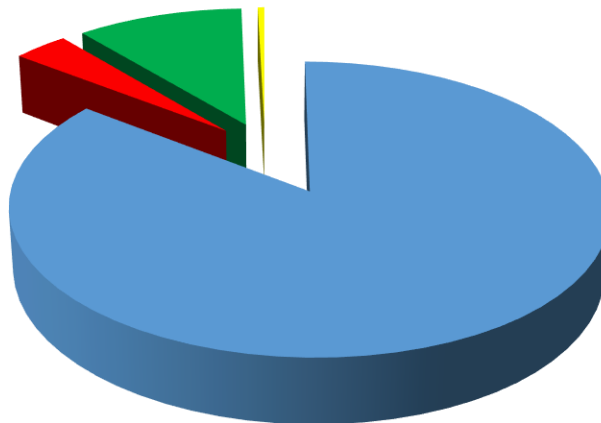
## Placing Instruction First

The Board of Education has always placed students at the forefront of decision making when it comes to budgets. The Board has made decisions to maximize the funds available for instruction in the classroom. In fact, the Board spends more of its budget on instruction than the provincial average.

### School District Operating Expenditures 2016-2017

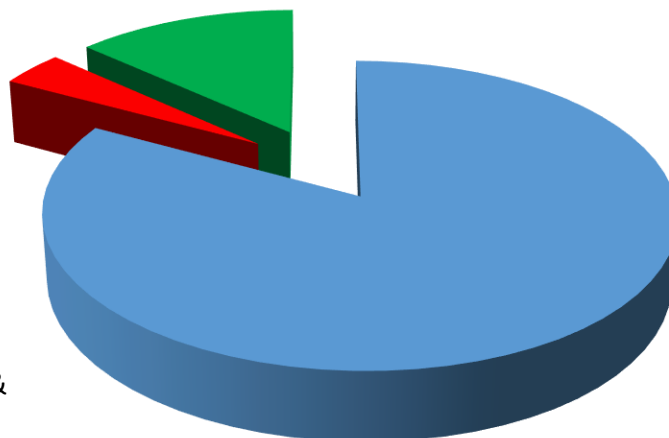
#### Coquitlam

- Instruction 85.47%
- Administration 3.52%
- Operations, Maintenance & Transportation 10.60%
- Debt Retirement 0.42%



#### Province

- Instruction 82.88%
- Administration 3.86%
- Operations, Maintenance & Transportation 13.26%

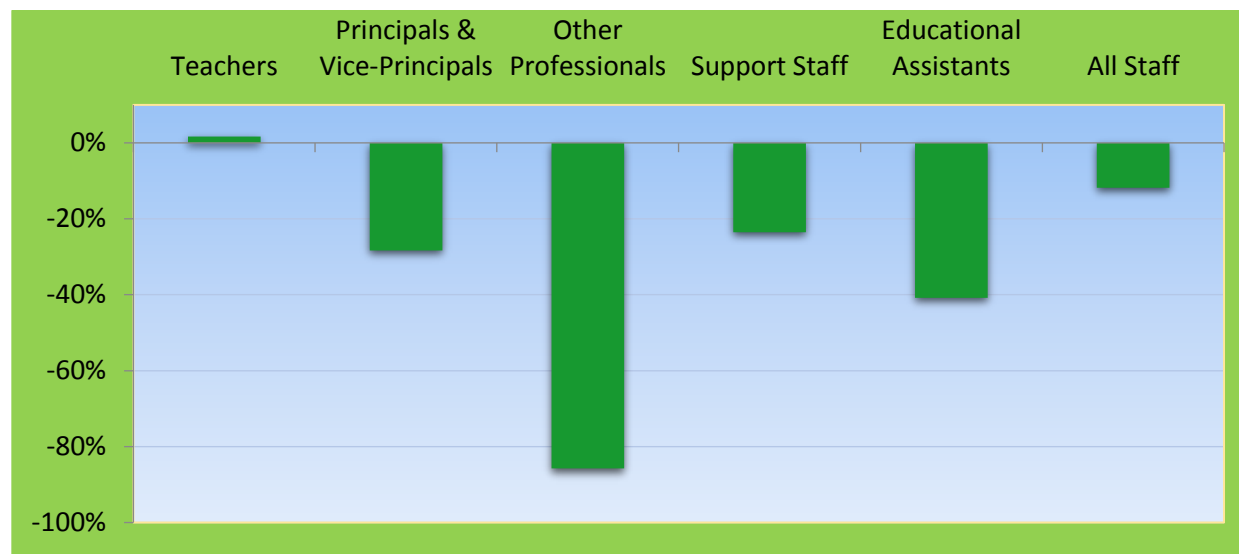


## Commitment to the Classroom

The Board of Education's long standing commitment to protecting learning in the classroom is made clear when we look at where we invest our staffing dollars. SD43 is staffed significantly under the provincial average in all categories, except teachers which are staffed slightly above the provincial average.

Principals and Vice-Principals are understaffed by 28%, support staff are understaffed by 24%, Education Assistants by 41%, and Other Professionals are understaffed by 85% in comparison to the provincial average. Overall, SD43 is understaffed by nearly 12% in comparison to the provincial average.

### Staffing Ratios - Coquitlam School District vs. Provincial Average 2016-2017



Staffing Comparison	Coquitlam Staff (full-time equivalent)	Provincial Average (student: staff member)	Coquitlam (student: staff member)	Variance
<b>Teachers</b>	1,763.17	17.65	17.35	1.68%
<b>Principals &amp; Vice-Principals</b>	113.50	210.07	269.53	-28.31%
<b>Other Professionals</b> (HR, excluded management and staff, Trustees)	52.60	313.09	581.59	-85.75%
<b>Support Staff</b>	500.61	49.48	61.11	-23.50%
<b>Educational Assistants</b>	417.27	52.07	73.31	-40.80%
<b>All Staff</b>	2,847.15	9.61	10.74	-11.78%

## A History of Student Success

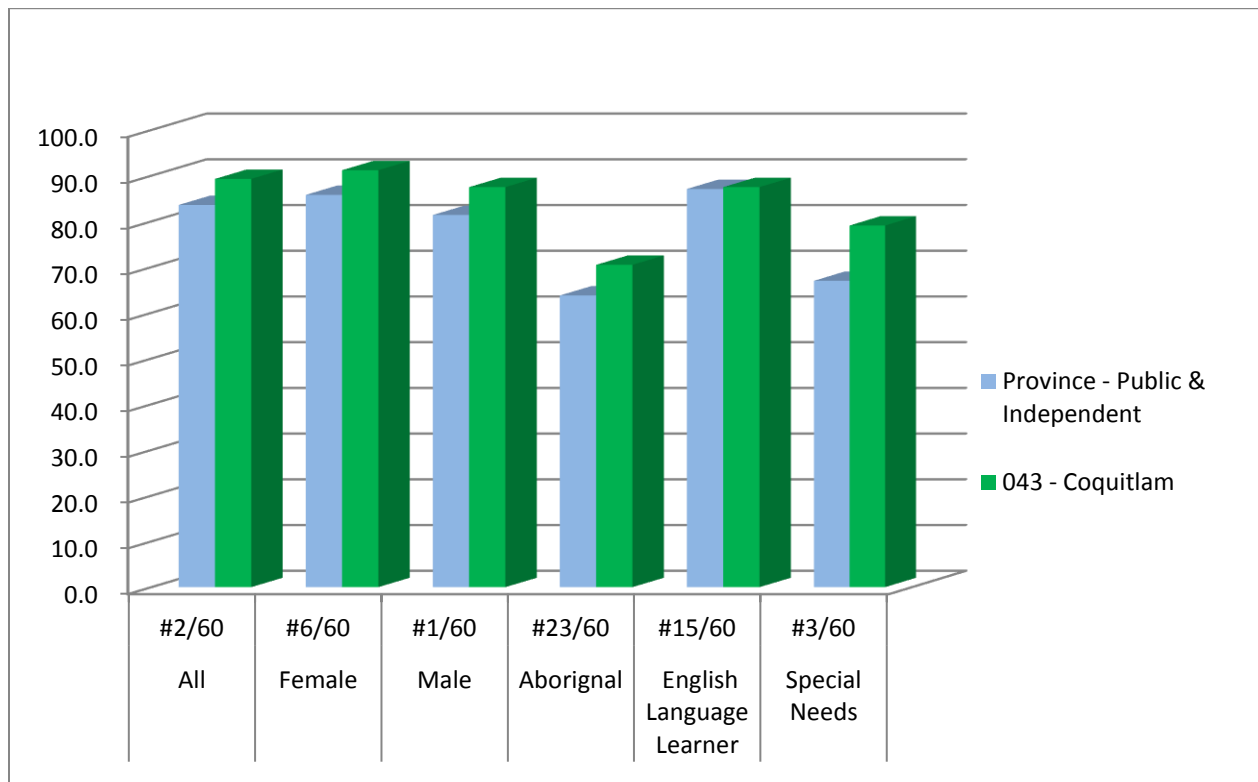
Through the budget process, the Board of Education will seek to maintain a high achieving and sustainable organization for the long-term which is built on our past successes. We will seek new and innovative ways to deliver our services which will ensure that we maximize our budgets and ensure quality learning for all students.

SD43 has a history of student success. The 2016 Achievement Levels released by the Ministry of Education show that our student achievement results exceed provincial norms on almost every measure.

The Board's goals are, and will continue to be, focused on helping students acquire a series of attributes to help them become Learners, Thinkers, Innovators, Collaborators, and Contributors. Our budget process will provide the answers needed for the difficult task of meeting our financial pressures while ensuring the continued success of our students.

The graph below reflects our student performance and ranking in all provincially measured areas against all 60 BC school districts.

### Coquitlam School District 2016 Achievement Levels \*



\* Based on Six-Year Completion and Grade 12 Graduation rates from the Ministry of Education's Report on Student Achievement

## Board of Education Values

The following values will guide the Board of Education in budget decision making:

1. **Inclusiveness:** we invite the community to participate in discussion.
2. **Integrity:** we respond to public input in an honest and forthright way; balancing the multiple needs of the various stakeholder groups while meeting the legal requirement of maintaining a balanced budget under the *School Act*.
3. **Commitment:** we commit to first defining issues, followed by reviewing engagement with stakeholders, then summarizing information and research, and finally reporting on decisions.
4. **Accountability:** we demonstrate that the results and outcomes of the process are consistent with the commitment made to the public at the beginning of the process.
5. **Transparency:** as decision makers, we ensure stakeholders and the public have opportunities to understand the scope, constraints and process for a pending decision.

## Our Stakeholder Engagement Commitment

### What is Stakeholder Engagement?

Stakeholder engagement is a two-way dialogue to allow the Board of Education and our many stakeholders to define opportunities and challenges, and work together on solutions. It allows for valuable input to the School District's direction and decision making.

### Your Role

To make stakeholder engagement a success, your role is to learn, engage and contribute:

- Learn about government funding and allocation;
- Learn about the SD43 budget process;
- Learn about *Directions 2020*, the School District's vision;
- Engage in the consultation by asking questions about the budget;
- Expect responses to your concerns and input; and
- Contribute ideas that align with the goals and objectives from *Directions 2020* on how to address the opportunities and challenges.

### Our Role

As the elected decision making body, we are accountable to you and our role is to:

- Listen to you;
- Respond to your questions and concerns;
- Consider your ideas and input; and
- Propose action and report back to you.

## Stakeholder Engagement Process

Ongoing through to April 18, 2017	April 11, 2017	April 25, 2017
<b>All Stakeholders</b>	<b>Preliminary Budget Presentation</b>	<b>Final Budget Presentation</b>
Meetings with departments, public board meeting discussions and presentations, two special public board meetings, public presentation opportunities, an open house and presentations of budget recommendations.	The Board of Education is presented with a preliminary budget for deliberation at this special board meeting.	The Board of Education is presented with a final budget for consideration and decision at this public board meeting

### Board Decision

There will be four public events leading up to the Board of Education communicating its decisions on next steps for the budget. All stakeholders are invited to attend.

### Who we Consult

Everyone is invited to comment on the School District's activities and initiatives. Here is a sample of stakeholders we hope to hear from:

- Parents and students
- Educators and administrators
- Community members and neighbours
- Community partners
- Business groups
- Local and provincial governments
- First Nations
- Diversity groups
- Non-profit groups
- Recreation commissions and sports groups
- Local health authority



## **Learn. Engage. Contribute.**

We are using a variety of methods to help you **learn**, keep you informed so you can **engage** in this process, and provide several opportunities for you to **contribute**.

### **Your Local Newspaper**

In print or online, look for public notices about public events, times and location in the Tri-Cities News. We will also keep local reporters informed and request that they share stories and provide their independent insights and perspectives.

### **School District Website**

All information on this process is available at [www.sd43.bc.ca/budget](http://www.sd43.bc.ca/budget). Check out the “FAQs” section, which will be continually updated with your questions and answers.

### **Board Meetings**

We have a series of Board meetings where budget information will be shared and discussed by the Board of Education.

### **Open House**

We encourage you to attend our open house where you can discuss the budget with Board of Education Trustees.

### **Twitter and Facebook**

Budget information and event reminders will also be communicated through the School District’s Twitter and Facebook channels: [www.twitter.com/sd43bc](http://www.twitter.com/sd43bc) and [www.facebook.com/sd43bc](http://www.facebook.com/sd43bc)

## Stakeholder Events Schedule

Stakeholder information and consultation events take place from April 11 – 25, 2017 as outlined below. There will be opportunities for questions and your contributions.

- **Special Public Meeting - Presentation of 2017-2018 Preliminary Budget**  
Tuesday, April 11, 2017, 6:30 p.m.  
Winslow Centre Gymnasium, 1100 Winslow Avenue, Coquitlam, BC  
The Preliminary Budget will be presented at this Special Public Board Meeting.
- **Open House**  
Tuesday April 11, 2017, approximately 7:30 p.m.  
Winslow Centre Gymnasium, 1100 Winslow Avenue, Coquitlam, BC  
An opportunity to speak with Trustees and key staff and contribute input.
- **Special Public Meeting - Delegation Presentations**  
Tuesday, April 18, 2017, 6:30 p.m.  
Winslow Centre Gymnasium, 1100 Winslow Avenue, Coquitlam, BC  
This will be an opportunity for delegations to present to the Board of Education on specific aspects of the budget. If you or your group would like to make a presentation, contact the Office of the Secretary-Treasurer before noon on Wednesday, April 12, 2017 at 604-939-9201 or email [AWalsh@sd43.bc.ca](mailto:AWalsh@sd43.bc.ca)
  - **When calling or emailing, please provide the following information:**
    - (i) name, email and phone number of presenter; and
    - (ii) written explanation of the budget matter you wish to cover (required); and recommendations and suggestions on how to address the issue(s).For more information please refer to the [Delegation Presentation Guidelines](#)
- **Public Board Meeting - Final Budget Presentation and Board Approval**  
Tuesday, April 25, 2017, 7:00 p.m.  
Winslow Centre Gymnasium, 1100 Winslow Avenue, Coquitlam, BC  
The annual budget will be presented to the Board of Education for approval at this Regular Public Board Meeting. This final budget would incorporate changes requested by the Board based on stakeholder input.

There will be an opportunity for questions at each of the meetings outlined.

## Decision Making Process

The Board of Education values all feedback and considers it carefully in making budget decisions. The input shapes outcomes and influences the options considered during the 2017-2018 budget process. As the elected body representing the people, the Board will make the final decision.

### 3-Phase Budget Planning Process

1. **Research** (ongoing through April 18, 2017): this phase includes background research, meetings with departments, delegations, questions & answers, two public board meetings and an open house.
2. **Reporting** (April 11 and 18, 2017): this phase includes the presentation of the preliminary budget, delegations, report on findings and results, as well as early recommendations on the vision, planning ideas and overall direction.
3. **Next Steps** (April 25, 2017): this phase presents final budget to the Board of Education for approval.

### Evaluation

The Board will make decisions based on its values and in consideration of the Four Guiding Principles of Learning Without Boundaries within the framework of *Directions 2020*.

## The SD43 Board of Education

The Board of Education is an elected body of nine trustees, who are accountable to the people of Anmore, Belcarra, Coquitlam, Port Coquitlam and Port Moody.

### Our Mission

*Our mission is to ensure quality learning opportunities for all students of all ages.*

**Kerri Palmer Isaak, Chair**

Kerri Palmer Isaak recently completed a six year term with the Village of Anmore Municipal Council and served as Board of Education Vice Chair in 2015. She is a Leader for Anmore Youth in Action and a mother of two daughters. She has also served in other leadership capacities within her community, including past PAC Chair for Moody Middle, Anmore Elementary and Eagle Mountain Middle. [kpalmersaak@sd43.bc.ca](mailto:kpalmersaak@sd43.bc.ca)

**Carol Cahoon, Vice-Chair**

Carol Cahoon is a 19 year Tri-City resident. She and her husband are the parents of two children currently in SD43. Active in her community, she is a member of the Soroptimist and Talk of the Town Toastmasters Club. She has served on PACs and the Coquitlam Montessori Society and is currently representative for BCSTA Metro Branch, Coquitlam Foundation, DPAC, English Language Learners Consortium and the City of Coquitlam Municipal Liaison Committee. [ccahoon@sd43.bc.ca](mailto:ccahoon@sd43.bc.ca)

**Chuck Denison**

Chuck Denison was elected a Trustee in 2014. Prior, he served as PAC President, DPAC President and on several District advisory committees. He currently serves on the Coquitlam Foundation Grants Committee, is Secretary of the BCSTA Metro Branch, and is a liaison with SLC, DPAC and City of Coquitlam Municipal Liaison Committee. [cdenison@sd43.bc.ca](mailto:cdenison@sd43.bc.ca)

**Barb Hobson**

Barb Hobson's passion for excellence in education for all students led her to be elected as a Trustee in 1996, 1999 (when she spent 3 years as Board Chair) and again in 2014. Her many volunteer activities include President of the Board of Place des Arts, President of the Rotary Club of Coquitlam and Director of the Coquitlam Foundation. Currently she is a representative to DPAC, SLC, City of Coquitlam Liaison Committee and the Board's elected representative to BCSTA Provincial Council. [bhobson@sd43.bc.ca](mailto:bhobson@sd43.bc.ca)

**Lisa Park**

Lisa Park emigrated from South Korea 16 years ago and has made BC her home. As a primary school teacher in SD41, Lisa demonstrates her belief that every individual deserves a good education. She has taught across BC and Alberta and holds a B.A., B.Ed. and TESOL certificate and is also qualified as an exercise rehabilitation trainer. [lpark@sd43.bc.ca](mailto:lpark@sd43.bc.ca)

**Judy Shirra**

Judy Shirra was first elected in 1993, served two terms as Chair and several terms as Vice-Chair. She has been involved with DPAC, Student Service Review, CPF, French Advisory, the reorganization of SD43 to middle schools, BCPSEA representative, Metro Trustee's, Port Coquitlam's Spirit Committee and Learning Without Boundaries. [jshirra@sd43.bc.ca](mailto:jshirra@sd43.bc.ca)

**Diane Sowden**

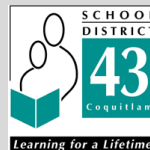
Diane Sowden was elected as a Trustee in the fall of 2005, and serves as a School District No. 43 appointee to DPAC and the City of Coquitlam Municipal Liaison Committee. She has been a resident of Coquitlam for the past 30 years and has eight children who received their education in the district. [dsowden@sd43.bc.ca](mailto:dsowden@sd43.bc.ca)

**Michael Thomas**

Michael Thomas is a married father of three School District No.43 (Coquitlam) students and a lifelong Tri-Cities resident. He has served on Port Coquitlam Municipal Standing committees as well as worked as a director with PoCo Heritage since 2009, where he served as the chair of several sub committees. [mithomas@sd43.bc.ca](mailto:mithomas@sd43.bc.ca)

**Keith Watkins**

Keith Watkins was first elected to the Board of Education in 1988 and is the longest serving Trustee on the Board. He has served as Vice-Chair as well as Board Liaison on The French Advisory Council and the Port Moody Parks and Recreation Commission. [kwatkins@sd43.bc.ca](mailto:kwatkins@sd43.bc.ca)

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