



Central Okanagan Public Schools
Superintendent of Schools/CEO
2023/2024 Budget Proposal Report



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OVERVIEW

The recent Ministry of Education and Child Care Operating Grant announcement saw a 9.4% increase to the per pupil operating rates which will cover the negotiated increases for teachers and support staff and help cover some of the District's inflationary costs and increased needs for next year. The District also anticipates the continued student growth will offset some of the ongoing budget pressures, however, the District anticipates a \$2.055M budget pressure for the 2023/2024 Annual Budget Bylaw.

The District can meet this anticipated \$2.055M budget pressure by leveraging a one-time benefit holiday for both teachers and support staff in the fall of 2023, as well as shifting food costs, currently supported by CommunityLink funding, to the new Provincial Food Program recently announced. This will then allow the District to redirect mental health costs from the Operating Fund to CommunityLink.

Response to the Ministry of Education and Child Care Operating Grant Announcement

The District is satisfied with the recent Ministry of Education and Child Care Operating Grant announcements and will continue to efficiently staff schools while addressing growth, capacity challenges, classroom complexity and increased dysregulated students in schools. There continues to be some areas of concern for the District:

1. Operating Grant funding did not fully address the inflationary cost increases the District is expecting for next year.
2. Portable costs, to address enrolment increases and capacity restraints, continue to be funded by the District's Operating Grant funding. The District is currently at 106% capacity utilization district wide.

The District will continue to create safe learning environments for students and staff as society becomes more complex and will continue to add programs where there are clear gaps.

District Information

The District is the fifth largest district in the province and represents 4% of the provincial enrolment. In September 2022, our student FTE (full time equivalent) was 24,234 while our headcount was 24,186 students. In February 2023, our student headcount grew to 24,515. The District currently operates 47 schools; thirty-two elementary, eight middle, five secondary schools, as well as one alternate education school and one K-12 online learning program. In September 2022, École Bellevue Creek Elementary School opened to kindergarten and grade one students, and in September 2023 will expand to include grade two students. Construction is underway at George Pringle Secondary School and is expected to open in September 2027. As well, the District received capital funds to expand École Dr. Knox Middle School, adding 300 additional student spaces to that site. This addition is expected to be completed by the fall of 2024. The District is currently constructing seven childcare buildings throughout the District that will provide 602 childcare spaces. These buildings are fully funded by the Ministry of Education and Child Care. The first centre to open will be at Black Mountain Elementary School later this school year.

The District employs approximately 4,250 full and part-time staff.

CENTRAL OKANAGAN PUBLIC SCHOOLS STRATEGIC PLAN 2021-2026

Central Okanagan Public Schools 2021-2026 Strategic Plan helps guide, along with the Budget Development Principles, the operational planning of the District budget. Budget requests are evaluated through the lens of the following four focused directions:

1. Equity and Excellence in Learning

We believe equity empowers each learner to thrive holistically. We also believe that each learner achieves excellence in learning when they have the confidence and competencies to pursue their passions and strengths.

2. **Transformative Leadership**

We believe in an ever-changing world, transformative leadership is a powerful catalyst for continuous improvement and growth that positively impacts our system, each school community, and ultimately each learner.

3. **Family and Community Engagement**

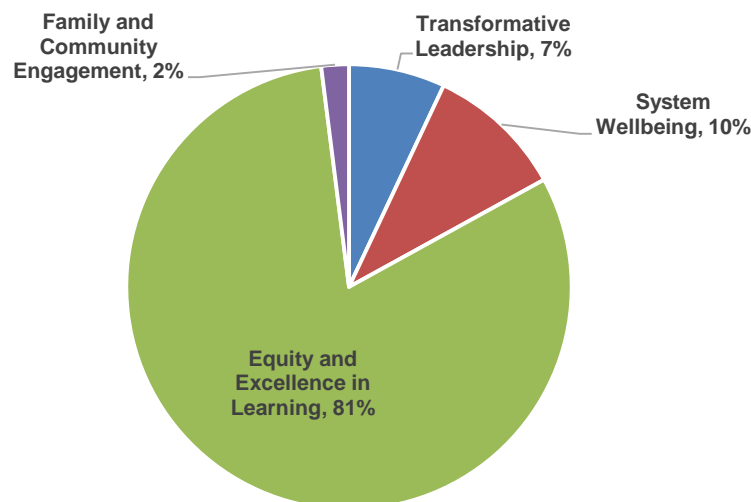
We honor the knowledge and experience that families and the community bring to our schools. By partnering together to improve student learning, opportunities for deep and meaningful engagement will emerge that supports, enriches, and nurtures each child in our care from cradle to career.

4. **System Wellbeing**

We believe in sustainable practices that provide support to each learner today without compromising or reducing the ability to support each of our learners in the future. Moving forward, in a culture of growth, innovation, engagement and wellness, ensures that we can adapt to changing environments while continuously supporting each of our learners.

Currently, the District's senior team's Workplan is aligned with the above strategic directions. Moving forward, the District plans to move to a priority-based budget.

The following graph is not a comprehensive analysis; however, it does broadly illustrate how we currently allocate the District's budget to the four above strategic directions.



The District continues to implement the Ministry of Education and Child Care's New BC Education Plan. The Plan is transforming education in the province so that learning is more personalized and focuses on the development of core and curricular competencies. The transformation of our system to meet the intentions of the Plan require that we use pedagogy that is learner centered and provides student agency, encourages innovation, embeds the First Peoples Principles of Learning throughout the curriculum, and is inclusive by design. This transformation requires educators to collaborate, possess growth mindsets and develop adaptive expertise. The budget needs to continue to support this work.

There are more priorities and programs that are expected to be delivered by districts including childcare, the BC Anti-racism Strategy, Accessibility Act, Truth & Reconciliation, and the Tri-Partite Agreement with First Nations that will change how the District does business and may have a budget implication in the future.

District student learning results demonstrate that previous budget decisions have resulted in investments that support student learning. The District has demonstrated student achievement above provincial and national averages and has a Ministry of Education and Child Care reported six-year graduation rate for BC residents of 96% and an Indigenous six-year graduation rate of 86%, both of which are above the provincial average and are the highest in the District's history. Most importantly, the trajectory of achievement results for the District has continued to improve over the past 10 years.

To achieve these results, the District offers early learning programs, focusses on foundational skill development and the development of the Attributes of a Learner as described in the District's Overarching Goal by offering students diverse programs of interest. The District strives to support learner readiness through collaboration with several independent providers such as preschools, StrongStart BC, Ready Set Learn, Hope for the Nations, Land Based Learning programs, middle school intervention services and other non-profit organizations. These organizations offer early learning initiatives, breakfast, lunch and after school programs. In addition, the District provides a variety of choices through board authority courses, specialty academies, apprenticeship programs, trades courses, computer and software development courses and French Immersion. As well, the District partners with Okanagan College, British Columbia Institute of Technology, University of British Columbia-Okanagan, Vancouver Film School, many local businesses, and other community organizations to provide dual credit, work study, leadership, and transition opportunities to our students. The District should continue to invest in these programs.

BUDGET DEVELOPMENT PROCESS

Each year, in accordance with the *School Act*, the District is responsible for creating a budget plan for the upcoming school year. This plan is the culmination of a process involving presentations, input gathering sessions, discussions, and feedback. The goal is to develop a Proposal that balances the funding that is available with the expenses that are required to provide a quality educational experience for all students.

In addition to the Central Okanagan Public Schools' Strategic Plan and the District's Vision, Purpose and Cultural Values, the District will also consider the District's Overarching Goal, using both the District Budget Development Principles and guided school-based budget decisions model expanded below.

DISTRICT BUDGET DEVELOPMENT PRINCIPLES

- students come first.
- every budget allocation will be aligned to meet the District's Vision, Purpose, Cultural Values and Overarching Goal.
- 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.

GUIDED SCHOOL BASED BUDGET DECISION MODEL

- Decisions are made considering:
 - school plans and District goals.
 - discussions with School Administration, Assistant Superintendents, Human Resources, Senior Management and Finance.
 - consultation with partners, parents, and students.
 - alignment to the school's plan and their ability to achieve the plan remain a priority.

Throughout the budget process, the following opportunities for input were provided:

Date	Description
February 6, 2023	Public presentation to provide information on the 2023/2024 budget. Presentation to Principals, Vice-Principals, COSBO (Exempt) Staff
February 15, 2023	Public Finance and Audit Committee Meeting (partner group input invited)
March 15, 2023	Ministry of Education and Child Care of Education and Child Care District Funding Announcement
April 5, 2023	Public Finance and Audit Committee Meeting (Information) <ul style="list-style-type: none"> Central Okanagan Public Schools Superintendent of Schools/CEO 2023/2024 Preliminary Budget Proposal Report
April 19, 2023	Public Finance and Audit Committee Meeting (Action) <ul style="list-style-type: none"> Central Okanagan Public Schools Superintendent of Schools/CEO 2023/2024 Budget Recommendation Report
April 26, 2023	Public Board Meeting <ul style="list-style-type: none"> Annual Budget set
June 21, 2023	Public Finance and Audit Committee Meeting (Action) <ul style="list-style-type: none"> 2023/2024 Annual Budget review
June 28, 2023	Public Board Meeting <ul style="list-style-type: none"> 2023/2024 Annual Budget approval

The Board of Education will engage in deliberations regarding the Superintendent of Schools/CEO's 2023/2024 Budget Proposal Report at the April 5, 2023, Public Finance and Audit Committee Meeting and, after consultation, the final Superintendent of Schools/CEO's 2023/2024 Budget Recommendation Report will be presented at the April 19, 2023 Public Finance and Audit Committee Meeting. The Board of Education will plan to complete this process at the April 26, 2023, Public Board Meeting. Final adjustments may be made up to June 21, 2023.

This Budget Proposal was developed with submissions from our District and school-based leadership teams, as well as partner groups, with a focus on making the most educationally sound decisions given the multitude of factors including:

- student classroom and composition guidelines.
- district non-enrolling ratio requirements.
- teacher qualifications available.
- space restrictions.
- student demographics and access to neighborhood schools.
- student course load requests.

These submissions include input through an online survey, discussions at committee meetings and other formal administrative and partnership meetings with:

- Trustees
 - Senior staff (Admin Council)
 - Principals and Vice-Principals (COPVPA)
 - Central Okanagan School Business Officials (COSBO) exempt staff
 - The Indigenous Education Council
 - The Canadian Union of Public Employees Local 3523 (CUPE)
 - The Central Okanagan Parent Advisory Council (COPAC)
 - The Central Okanagan Teachers' Association (COTA)
 - Parents and the community
-

Communicable Disease Plan Update

During the COVID-19 pandemic, government, Board of Education partners, the Office of the Provincial and Regional Health Officers, and the Ministry of Education and Child Care worked collaboratively together to ensure schools were low risk environments and safe for students and staff. Students continue to face increased challenges because of the pandemic including, but not limited to, declining mental and physical health, decreased educational attainment, family stressors, reduced access to community services, food security, and housing insecurity to name a few.

Moving forward, the District will continue to support other layers of protection in our schools, as outlined in the current Communicable Disease Plan. The District will continue to follow advice from Interior Health Authority.

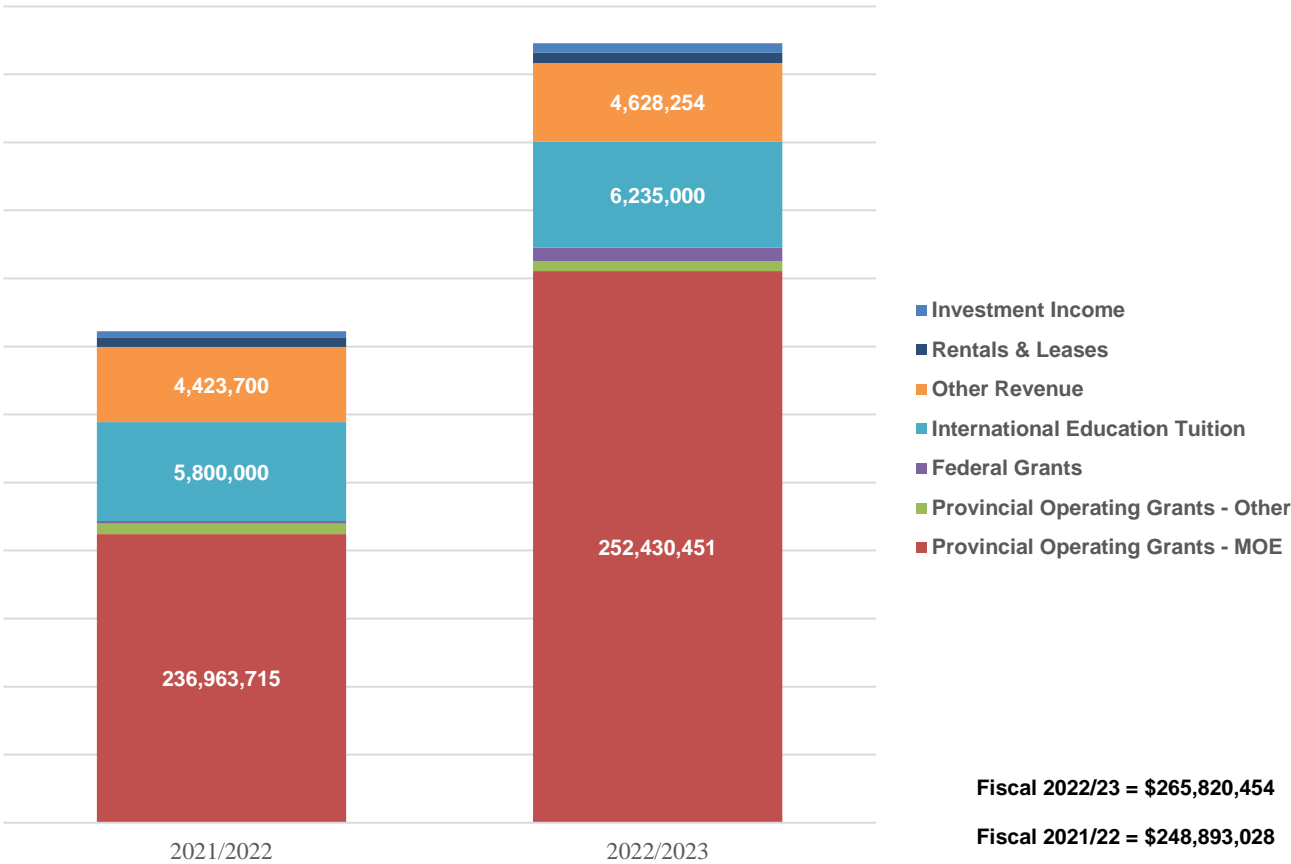
This Central Okanagan Public Schools Superintendent of Schools/CEO 2023/2024 Budget Proposal Report considers each of the following areas:

- I. Base Operating Budget Revenues and Expenses and Other Significant Changes
- II. Key Assumptions for the 2023/2024 School Year
- III. Additional Budget Requests

I. **BASE OPERATING BUDGET REVENUES AND EXPENSES**

The foundation of all budget development begins with the District Base Operating Budget. This represents the revenue and expenses of the District as they currently exist to deliver the programs and services the District provides.

Base Operating Budget Revenues (2022/2023 vs 2021/2022 Amended Annual Budget)



Most of the operating revenue for the District (95%) is derived from the Ministry of Education and Child Care's Operating Grant. The province establishes this grant annually for public education using a funding allocation system that is intended to ensure equity across all districts in British Columbia. The allocation system is based primarily on enrolment with further allocations based on unique demographic or District characteristics. Since enrolment is the primary driver in the formula, all budget planning begins with a projected enrolment figure for the next school year.

Other sources of revenue include other provincial grants, locally generated revenue (tuition payments, fees, and rentals), and surplus carry forwards from the previous year, as well as designated funds for capital or school-based activities. Central Okanagan Public Schools has focused on increasing local revenues over the last several years through the expansion of the International Education Program, providing fee for service in the Health and Safety Program and WorkSafeBC claims management, as well as recovering costs through the charging of rentals for facilities, and a transportation fee.

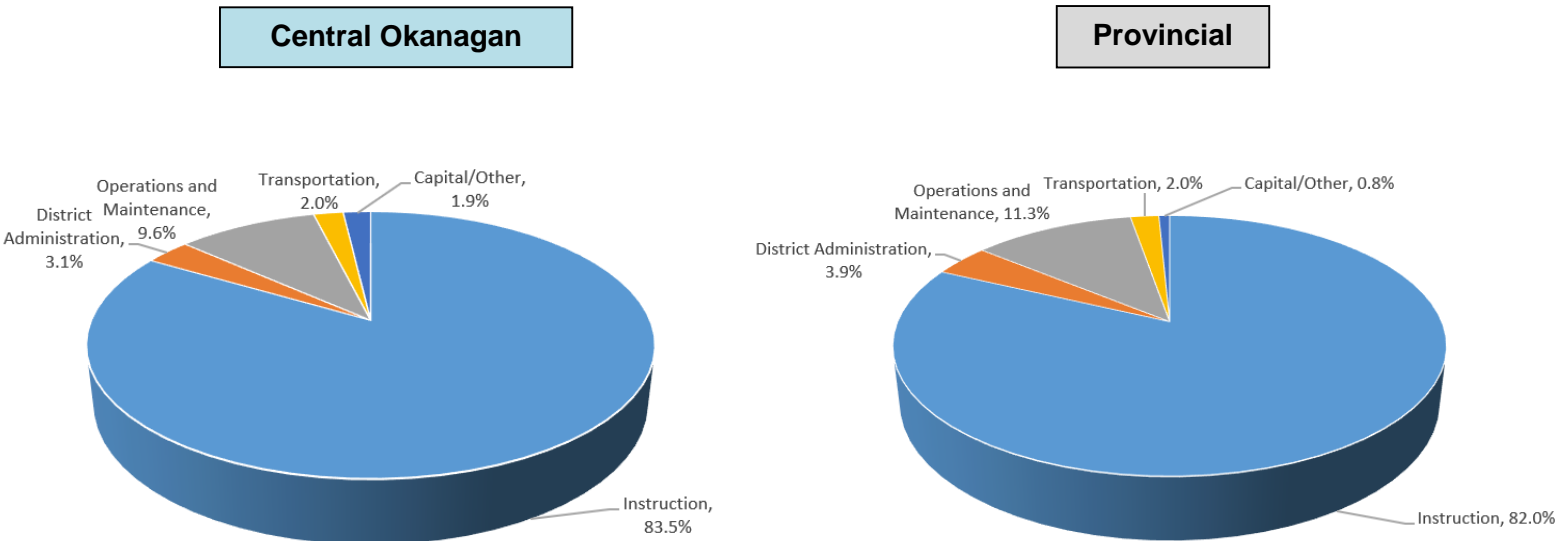
Base Operating Budget Expenses (2022/2023 Budget)

Boards of Education manage and distribute their operating funding allocation based on local spending priorities. In addition, the province provides capital costs and funding for specialty programs through supplemental and special purpose grants.

All allocations are then identified and categorized into six major ***program*** areas. These include Instruction, District Administration, Operations and Maintenance, Transportation, Local Capital, and Capital Fund.

- **Instruction** - includes all allocations to schools as well as District instructional services offered to provide educational opportunities within the District. Instructional programs are categorized as General Instruction, Career Life Programs, Library Services, Counselling, Social Emotional, Inclusive Education, English Language Learning, Indigenous Education, School-Based Administration, and International programs.
- **District Administration** - includes Educational Administration, Business and Human Resources Services, and Board Operations (Governance).
- **Operations and Maintenance** - relates to the services required to operate and maintain all District facilities.
- **Transportation** - includes the transportation of students to and from school.
- **Local Capital** (included in Capital/Other) - includes the provision of funding to support the Technology Refresh program as well as allocations to maintain and replace capital equipment items such as vehicles, computers, tables, chairs, etc.
- **Capital Fund** - includes amortization of tangible capital assets and any value write down of buildings and sites.

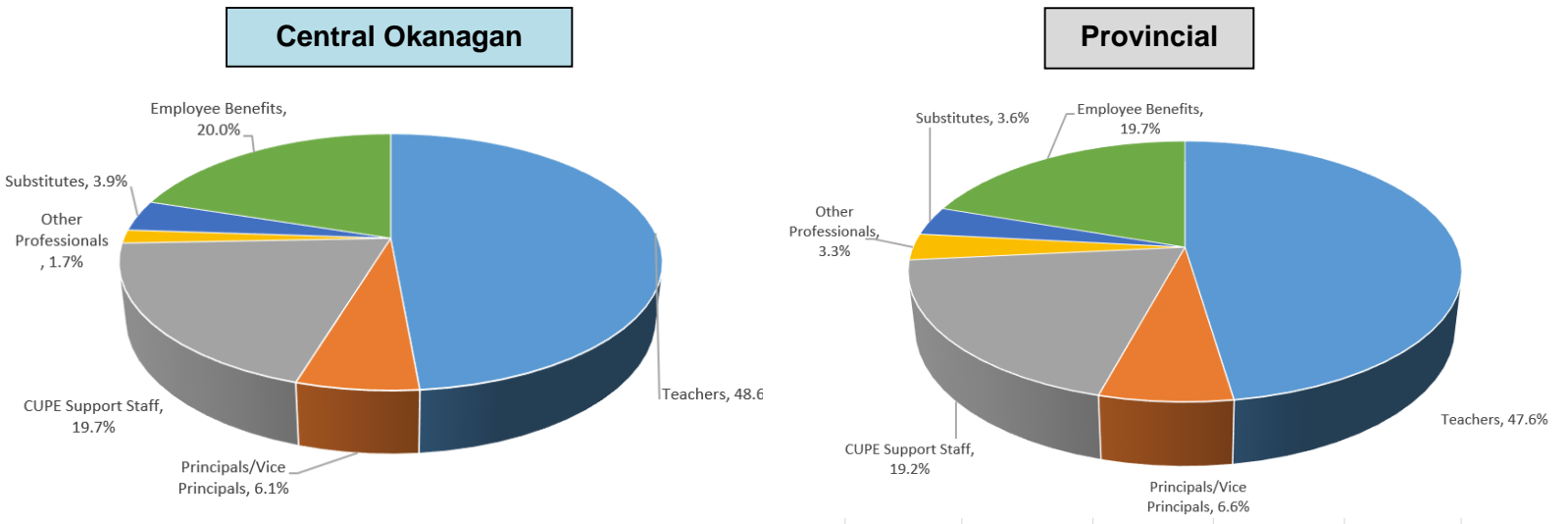
2022/2023 District's Budget by Program Compared to Provincial



When compared to the provincial average, Central Okanagan Public Schools dedicates more to instruction and capital and less to administration and operations. It also dedicates a larger percentage of its budget to capital replacement programs, which fund technology, portable costs, and equipment replacement. Technology replacement is coordinated through the District's Technology Refresh program, which replaces District technology on a four-year cycle.

An alternate representation of the expenses is by **object** including multiple employee groups, employee benefits, services & supplies, capital/other (which includes Local Capital and the Capital Fund).

2022/2023 District's Budget by Object Compared to Provincial



Most of the spending in these categories (88%) is dedicated to salaries and benefits. Staff salaries are primarily the result of negotiations between the province and the professional associations/unions, representing the various employee groups. When compared to the provincial average, the District spends more on teachers, less on principals and vice-principals and other professionals, and a similar amount on CUPE support staff.

II. OTHER SIGNIFICANT CHANGES

Provincial Food Program for Districts

The Ministry of Education and Child Care has announced funding for a new food program for the 2023/2024 school year. The food program will create new school food programs and expand existing ones to address food insecurity for students. This is expected to be a permanent program with fixed funding for the first three years.

Along with the operational funding, the Ministry of Education and Child Care has committed \$5M per year of capital funding to support districts in purchasing equipment and completing necessary renovations to support the food program.

Framework for Enhancing Student Learning

The Enhancing Student Learning Policy requires boards of education to set, create and maintain a Strategic Plan, annually report on student outcomes, and put systems in place to continuously improve the educational outcomes for all students and improve equity for Indigenous students, children and youth in care, and students with disabilities or diverse abilities.

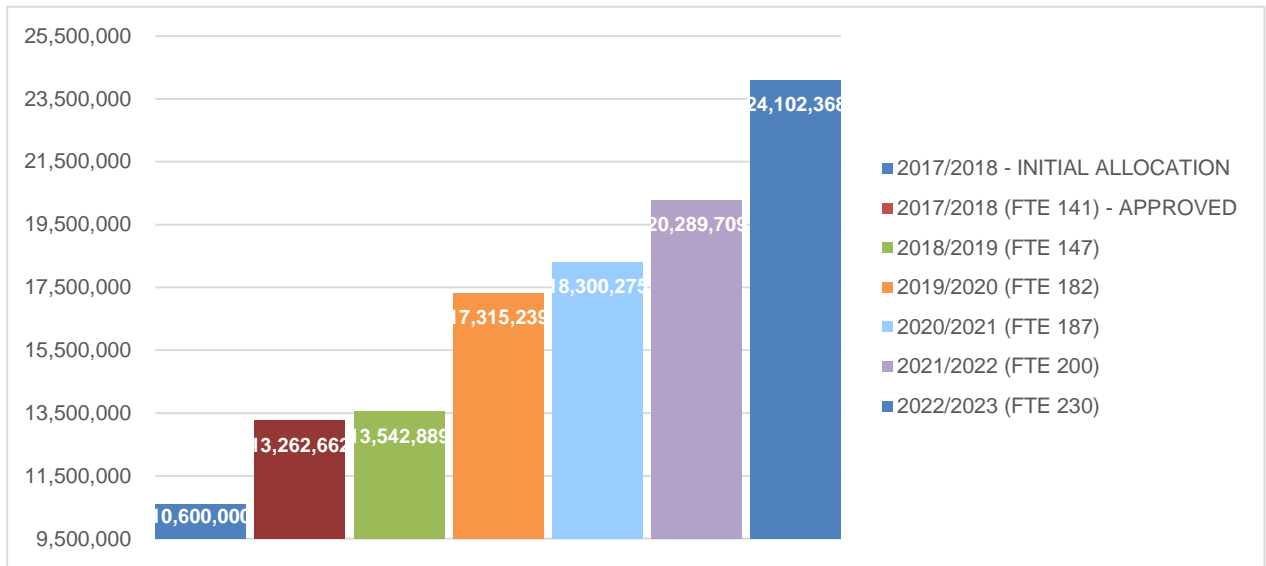
The Board of Education is expected to use the District's Strategic Plan to align all district annual operational plans, including but not limited to, the financial plans (budget) and human resources, with the educational objectives from the Strategic Plan. In accordance with the Enhancing Student Learning Policy, the Superintendent's Budget Proposal for 2023/2024 demonstrates a priority-focused budgeting process that is aligned with the goals and strategic directions outlined in the Central Okanagan Public School's Strategic Plan 2021 – 2026.

Classroom Enhancement Fund (CEF)

The final piece in the development of the 2023/2024 budget includes the ongoing implementation of the MoA:LoU#17, which resolved the matters arising from the implementation of the Supreme Court of Canada decision from the fall of 2016. This decision restored pre 2001 Teacher Collective Agreement language with respect to class size and composition.

The negotiated Classroom Enhancement Fund was established to implement MoA:LoU#17 and must be used to provide educationally sound classroom organization as well as meet the required District non-enrolling ratios as outlined in our local Teacher Collective Agreement. Costs to the fund will include teacher costs as well as ancillary costs related to professional development and resources.

In 2016, the Ministry of Education and Child Care's initial assessment of our District's CEF needs was \$10.6 million. Due to our unique Collective Agreement language and the needs of the students in our District, senior staff successfully negotiated with the Ministry of Education and Child Care to increase our 2017/2018 CEF funding to \$13.26 million and the District added 141 FTE enrolling and non-enrolling teachers. The following graph illustrates the District's CEF funding and the enrolling and non-enrolling teacher FTE over the last several years.



The District will continue to maximize the Classroom Enhancement Fund to add enrolling and non-enrolling teaching support to schools to address classroom complexity (both composition & class size) and the District's capacity challenges (currently 106% District wide capacity).

III. KEY ASSUMPTIONS FOR THE 2023/2024 SCHOOL YEAR

Inherent in this approach is the assumption that the base from which the budget is built appropriately allocates resources to the schools and departments to achieve their goals. The budget is not re-built from a 'zero base' each year as much of the District's costs are fixed and educational programs are complex and affect multiple schools and/or departments. An analysis of this magnitude would be unlikely to highlight potential reductions that are not already obvious. The Budget Development Process also requires an extremely tight timeline as Ministry of Education and Child Care funding announcements are made approximately six weeks prior to the District's deadline for establishing staffing levels.

Rather than completing a 'line-by-line' budget analysis each year, the District performs several processes on an ongoing basis to ensure that the base allocations are appropriate. These include:

- Review achievement relative to the goals.
- Review historical spending in the allocated budget areas to ensure budgets are adequate but not excessive.
- Provide schools with greater decision-making over the use of discretionary funds through collaborative and guided discussions. Schools, in turn, promote accountability and efficiency by setting clear goals and aligning them with District goals, as well as gathering data on student learning to support decisions regarding instructional staffing levels as well as resource allocation.
- Compare spending to comparative sized districts as well as to provincial averages.
- Complete program reviews on a cyclical basis to ensure programs, structures and strategies continue to meet the needs of the District.

The following items represent the significant operational adjustments required for the 2023/2024 fiscal year:

- Increased teaching full time equivalent (FTE) resulting from anticipated student growth.
- Expected incremental grid increases for teaching staff.
- Increased teacher illness costs.
- Increased CPP, EI, WCB and benefit costs.
- Additional bus route to support growth in West Kelowna.
- Anticipated diesel fuel costs because of the increase in the per liter gas prices.
- Anticipated salary adjustments for Principals, Vice-Principals, and exempt management staff.
- Increased costs for portable needs.
- Increased costs relating to the seven new childcare spaces (custodial, utility, maintenance etc.)

Additional adjustments are made to balance the 2023/2024 Annual Budget.

A summary of the 2023/2024 Estimated Operating Grants incorporating these increases and Ministry of Education and Child Care per pupil adjustments is included in "**Appendix B**".

Enrolment Assumptions Include:

- Increase in BC resident FTE of 200 to 24,434 FTE, however this enrolment increase may trend to as high as 300 FTE. See "**Appendix C**" for details.
 - Student FTE in the International Education Program will remain at 430 FTE.
 - Increase in Inclusive Education students (both Ministry of Education and Child Care and District funded).
 - Increase in English Language Learners, including newcomer refugee families.
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OVERVIEW OF THE PROJECTED 2023/2024 BUDGET

An overview of the projected 2023/2024 budget is illustrated here and begins with the 2022/2023 Amended Budget.

From the 2022/2023 Amended Budget, carryforward balances are removed and adjustments for growth and other required changes for the 2023/2024 year are added.

The estimated 9.4% per pupil increase in funding covers the negotiated increases for teachers, support staff and the 2022/2023 increases for principals, vice-principals, and exempt staff. Funding adjustments made to the Operating Grant are sufficient to cover most of the costs due to increasing enrolments and inflationary costs. Some costs incurred that are not funded through the Operating Grant include additional portable costs, CPP, EI, WCB and benefit rate increases. These unfunded costs are covered through enrolment growth and other efficiencies or cost reduction. Once all costs are covered, the budget is balanced.

REVENUE	Amended Bylaw 2022/2023	Adjust for Carryforwards	Net Amended Bylaw 2022/2023	Growth & Required Changes	2023/2024 Annual Budget
OPERATING GRANTS					
- Operating Grants	250,374,128		250,374,128	17,590,621	267,964,749
- Other Ministry Grants	2,635,786		2,635,786	1,721	2,637,507
- Federal Grants	793,536		793,536	219,607	1,013,143
- International Education	6,235,000		6,235,000	0	6,235,000
- Other Revenue	5,782,004		5,782,004	900,580	6,682,584
OPERATING SURPLUS CARRY FORWARD	4,221,323	(2,869,992)	1,351,331	1,175,000	2,526,331
SPECIAL PURPOSE GRANTS					
- Special Purpose Grants	31,483,736		31,483,736	152,536	31,636,272
- Other Revenue	6,000,000		6,000,000	0	6,000,000
- Investment Income	0		0	0	0
SPECIAL PURPOSE CARRY FORWARD	629,377		629,377	134,543	763,920
CAPITAL GRANTS	13,755,941		13,755,941	0	13,755,941
Total Revenue	\$ 321,910,831	\$ (2,869,992)	\$ 319,040,839	\$ 20,174,608	\$ 339,215,447
EXPENSES	Amended Bylaw 2022/2023	Adjust for Carryforwards	Net Amended Bylaw 2022/2023	Growth & Required Changes	2023/2024 Annual Budget
STAFFING & BENEFITS					
- Teachers	135,714,146	(454,234)	135,259,912	11,954,921	147,214,833
- Principals and Vice-Principals	14,639,239		14,639,239	572,096	15,211,335
- Educational Assistants	23,945,239	(110,721)	23,834,518	1,044,685	24,879,203
- Support Staff	23,994,976	164,869	24,159,845	1,964,747	26,124,592
- Other Professionals	3,950,840		3,950,840	444,187	4,395,027
- Substitutes	9,762,303	(8,772)	9,753,531	(3,478)	9,750,053
- Employee Benefits	53,206,611	(145,668)	53,060,943	4,317,342	57,378,285
SERVICES & SUPPLIES	37,314,824	(2,315,466)	34,999,358	(647,078)	34,352,280
CAPITAL	13,755,941	0	13,755,941	0	13,755,941
OTHER CAPITAL	5,626,712		5,626,712	527,186	6,153,898
Total Expenses	\$ 321,910,831	\$ (2,869,992)	\$ 319,040,839	\$ 20,174,608	\$ 339,215,447
Net Budget	\$ (0)	\$ (0)	\$ (0)	\$ 0	\$ (0)

Staffing	Amended Bylaw 2022/2023	Adjust for Carryforwards	Net Amended Bylaw 2022/2023	Growth & Required Changes	2023/2024 Annual Budget
Teachers	1,529.5222	(5.3529)	1,524.1693	21.1629	1,545.3322
Principals and Vice-Principals	105.0314		105.0314	3.0000	108.0314
Other Professionals	41.5416		41.5416	1.9584	43.5000
Support Staff (CUPE)	1,089.9536	(2.9000)	1,087.0536	40.6600	1,127.7136
Total	2,766.0488	(8.2529)	2,757.7959	66.7813	2,824.5772

IV. SIGNIFICANT BUDGET ADJUSTMENTS FOR THE 2023/2024 SCHOOL YEAR

The following outlines the specific details of the additional budget adjustments that are included in the 2023/2024 budget. Adjustments have been categorized by the associated employee group.

Central Okanagan Teachers' Association (COTA)

- 1) With the projected growth in the 2023/2024 school year, the District anticipates adding the following teacher FTE to the 2023/2024 budget. The Low column represents a 200 FTE student enrolment growth while the High column represents a 300 FTE student enrolment growth. The District anticipates absorbing some teacher FTE into the existing school organizational charts.

Description	Low	High
Enrolment Growth	8.0000	12.0000
Growth & Required Change	8.0000	12.0000

Strategic Direction – Equity and Excellence in Learning

Current Budget (2022/2023) - \$162,178,267 (COTA wages & benefit costs only)

Growth & Required Change – 8.000 FTE (\$1,069,261, wages, benefits & resources)

- 2) In the past, cost of sick leave was budgeted using historical patterns applied to current staffing levels; however, illness costs continue to trend higher since the COVID-19 pandemic occurred. As a result, the District has added to the teacher illness budget again for the 2023/2024 school year.

Description	2023-24	2022-2023	Change
Illness	6,507,455	5,876,363	631,092
Illness Change	\$6,507,455	\$5,876,363	\$631,092

Strategic Direction – System Wellness

Current Budget (2022/2023) - \$5,876,363 (COTA illness & replacement costs only)

Growth & Required Change - \$631,092 (COTA illness & replacement costs only)

Canadian Union of Public Employees CUPE Local 3523

- 3) With the overall anticipated student growth across the Central Okanagan, (i.e., students with unique needs, increase in refugee and immigrant student support, Ministry of Education and Child Care funded childcare spaces), the District anticipates a net change of approximately 40.6600 CUPE FTE to the 2023/2024 budget:

Description	Growth
CEA	29.4624
Clerical	6.1001
Operations	5.0975
Total FTE	40.6600

CEA	1,563,452
Clerical	386,050
Operations	340,515
Total FTE	\$2,290,017

Strategic Direction – Equity and Excellence in Learning

Current Budget (2022/2023) - \$61,787,385 (CUPE wages & benefit costs only)

Recommended Increase – 40.6600 FTE (\$2,290,017 wages & benefit costs)

V. BUDGET REQUESTS FOR THE 2023/2024 SCHOOL YEAR

The following outlines the specific details of the additional budget requests that were made, along with a proposal from the Superintendent of Schools/CEO. Requests have been categorized by the associated employee group.

Central Okanagan Teachers' Association (COTA)

1) COTA Budget Request

The District received a request from the COTA to maintain the existing professional development budget as outlined below.

Description	2023-24	2022-2023	Change
Inquiry Project	35,000	35,000	0
TTOC Fund	7,500	7,500	0
LSA Fund	25,000	25,000	0
Social Justice Grant	15,000	15,000	0
Total Professional Development	\$82,500	\$82,500	\$0

Rationale

The District continues to support expanded professional development opportunities that are coordinated through COTA.

Recommendation

Strategic Direction – Transformative Leadership

Current Budget (2022/2023) - \$82,500 (Resources)

Recommended Change - None

Canadian Union of Public Employees Local 3523 (CUPE)

2) CUPE Staffing Budget Request

The District received a request from CUPE Local 3523. A summary of items requested are below:

- Daytime custodial staff at all school sites to maintain cleanliness and health and safety of all staff and students.
- Increase staffing levels in the Operations Department to address workload.
- Coordinated training program for all staff.

Response

- i. The District currently employs 18 FTE daytime custodians supporting 36 school sites. The other school sites are supported by 11 FTE head custodians during the day. As well, as school sites open, additional custodial staff are added to the budget. For the 2023/2024 Annual Budget, 4 FTE custodial staff were added to address the seven new childcare spaces currently under construction throughout the District.

- ii. In the 2023/2024 Annual Budget, 1 FTE grounds position and 1 FTE bus driver was added to help address workload and growth.
- iii. The District provides two professional development opportunities for CUPE staff to attend, one day in the fall and one day in the spring. As well, \$100,000 is set aside each year in the budget to support the CUPE Inservice and Professional Development Fund and each department sets aside budget to support professional development opportunities for CUPE staff.

Recommendation

Strategic Direction – System Wellness

Current Budget (2022/2023) - \$61,887,385 (CUPE wages, benefits, and resources)

Recommended Increase – 6.0000 FTE (\$451,909 wages and benefits costs only)

The following items would need to be part of the bargaining process and any changes would impact the current collective agreement. As well, the childcare items would negatively affect current service agreements with community partners and would require additional District staff to manage. Currently the demand for the expansion of the Seamless Day program has not been demonstrated by the public.

- Increase CEA hours of work by $\frac{3}{4}$ hour a week across the District.
 - Increase hours for clerical staff to reduce overtime hours and aid in retention of relief staff.
 - Childcare services offered on District property should be staffed by District employees.
 - Expansion of the Seamless Day Pilot program into other school sites.
-

School Staff Survey Results

3) School Staff Budget Request

The District received a request from the Central Okanagan Principals' & Vice-Principals' Association (COPVPA). COPVPA supports having additional vice principals in each high need elementary school where there are single administrators.

4) School Staff Budget Request

The District received a list of requests from school Principals and Vice-Principals. A summary of the items requested are below:

- Additional teaching staff (classroom support, counselling, social emotional, literacy and numeracy).
- Increased mental health support.
- Increase to behavioural and classroom CEAs.
- Various services, supplies, and capital items.

Response

To support students with mental health and well-being at the elementary level, the District currently provides social emotional learning teaching support at several elementary schools. Within the 2023/2024 Annual Budget, two additional social emotional teaching staff have been added to increase this support.

Strategic Direction – Equity and Excellence in Learning

Current Budget (2022/2023) - \$265,179,811 (Total Operating Budget only)

Budget Request (2023/2024) - \$2,301,405 (wages, benefits, resources)

Recommended Increase – 2.000 FTE (\$244,170 wages, benefits resources)

District Senior Staff

5) District Senior Staff Budget Request

The District received a list of requests from District senior staff which included additional administrative, teaching and CUPE staff and various services and supplies.

Response

In the 2023/2024 Annual Budget, the District will support the following requests from District Senior Staff.

- a) **International Education Program** – With the rapid expansion of settlement services, a shift of International Education administration was needed to support an unprecedented increase in refugee and immigrant students and families. With this shift, a business manager of International Education is required to maintain the current administrative support for the International Education Program.

- b) **Manager of Privacy & Cyber Security** – As of February 1, 2023, new requirements under the Freedom of Information and Protection of Privacy Act (FOIPPA) are in effect which includes mandatory breach reporting and privacy management program requirements. In order to comply with these requirements, the District is in the process of hiring a Manager of Privacy & Cyber Security with the industry knowledge & qualifications to ensure compliance. This role will also manage the District's risk of privacy breaches, unauthorized access to information and ensure data is secure.
- c) **Sexual Health Education Program (SHEP)** – Due to the Ministry Education and Child Care requiring the delivery of consent education prior to graduation, and increased student enrolment, an additional of 1 FTE is required. This is also a recommendation that will be included in the Level 1 Program Review.
- d) **Inclusive Education Services** – With the anticipated growth in students with unique needs, the District anticipates adding additional resource teaching and CEA FTE to schools to better manage current student caseloads and to support designated students.
- e) **English as Second Language (ELL) Department** – With the unprecedented increase in non-English speaking students in classrooms, the District expects a significant increase to the ELL non-enrolling teaching staff to support students. The District continues to exceed the ELL non-enrolling ratio requirement.
- f) **Transportation Department** – The continued increase of diesel fuel rates requires additional budget be set aside for increased costs. The Board of Education has approved an increase to the 2023/2024 transportation fees to offset these increased costs.

Strategic Direction – Equity and Excellence in Learning and System Wellness

Current Budget (2022/2023) - \$265,179,811 (Total Operating Budget only)

Budget Request (2023/2024) - \$5,396,047 (wages, benefits, resources)

Recommended Increase – 51.9514 FTE (\$3,604,092 wages, benefits resources)

APPENDIX A

2023/2024 Budget Adjustments and Proposed Request Summary

The following summary outlines the changes to staffing and resources (net of fully funded negotiated increases for teachers and support staff) the District plans to implement, directly and indirectly, to the classroom during the 2023/2024 school year. The summary is broken down into two sections – significant budget adjustments and proposed budget request.

	FTE	Wage & Benefits	Resources	Capital	Total
SIGNIFICANT BUDGET ADJUSTMENTS					
Teaching Staff					
- Teachers & Resources (Growth)	8.0000	936,240	133,021	0	1,069,261
- Teacher Grid Costs	0.0000	1,250,000	0	0	1,250,000
- Teacher Illness	0.0000	631,182	0	0	631,182
- Additional ELL FTE	4.5000	526,635	0	0	526,635
- Increase to Teacher Prep Time	4.3200	505,570	0	0	505,570
- Other	4.3429	508,250	15,165	0	523,415
	21.1629	4,357,876	148,186	0	4,506,062
School Administration					
- District Vice-Principal of Indigenous Education	1.0000	169,122	0	0	169,122
- District Principal of Food Program	1.0000	187,492	0	0	187,492
- District Vice-Principal for Anti-Gang Initiative	1.0000	160,285	0	0	160,285
- School Administrator Grid Costs	0.0000	361,330	0	0	361,330
	3.0000	878,229	0	0	878,229
Management Administration					
- Business Manager of International Education	1.0000	151,270	0	0	151,270
- Manager of Privacy & Cyber Security	1.0000	151,270	0	0	151,270
- Other	(0.0416)	(6,293)	0	0	(6,293)
- Management Grid Costs	0.0000	158,882	0	0	158,882
	1.9584	455,129	0	0	455,129
CUPE Staff (Net Change)					
- CEA	29.4624	1,563,452	0	0	1,563,452
- Clerical Staff	6.1001	386,050	0	0	386,050
- Operations	5.0975	340,515	0	0	340,515
	40.6600	2,290,017	0	0	2,290,017
Other Wage & Benefit Costs					
- CUPE Illness	0.0000	175,000	0	0	175,000
- Additional Benefit Costs	0.0000	1,304,025	0	0	1,304,025
	0.0000	1,479,025	0	0	1,479,025
Services & Supplies					
- Costs for Childcare Spaces	0.0000	0	212,896	0	212,896
- Increased Fuel Costs	0.0000	0	145,000	0	145,000
- Net Portable Needs	0.0000	0	0	(232,700)	(232,700)
- Increased Utility Costs	0.0000	0	367,813	0	367,813
- Other Miscellaneous Resources	0.0000	0	404,631	0	404,631
	0.0000	0	1,130,340	(232,700)	897,640
Net Significant Budget Adjustments	66.7813	9,460,277	1,278,526	(232,700)	10,506,103
PROPOSED BUDGET REQUEST					
Status Quo					
- COTA Professional Development	0.0000	0	82,500	0	82,500
	0.0000	0	82,500	0	82,500

APPENDIX B

2023/2024 Ministry of Education and Child Care Estimated Operating Grant Summary

Estimated Operating Grants Overview - 2023/24 School Year

September 2023 Enrolment Count				
	School-Age Enrolment	Funding Level	Funding	Total Supplement
Standard (Regular) Schools	23,971.9375	\$8,625	\$206,757,961	
Continuing Education	3.0000	\$8,625	\$25,875	
Alternate Schools	275.0000	\$8,625	\$2,371,875	
Online Learning	175.0000	\$6,960	\$1,218,000	
Home Schooling	63	\$250	\$15,750	
Course Challenges	10	\$270	\$2,700	
Total Enrolment-Based Funding (September)	24,424.9375			\$210,392,161
	Total Enrol. Change	Funding Level	Funding	Total Supplement
1% to 4% Enrolment Decline	204.4375	\$4,313	\$0	
4%+ Enrolment Decline		\$6,469	\$0	
Significant Cumulative Decline (7%+)	1,080.8750	\$4,313	\$0	
Supplement for Enrolment Decline				\$0
	Enrolment	Funding Level	Funding	Total Supplement
Level 1 Special Needs	18	\$49,070	\$883,260	
Level 2 Special Needs	1,374	\$23,280	\$31,986,720	
Level 3 Special Needs	240	\$11,760	\$2,822,400	
English Language Learning	1,466	\$1,735	\$2,543,510	
Indigenous Education	3,169	\$1,710	\$5,418,990	
Adult Education	8.0000	\$5,505	\$44,040	
Equity of Opportunity Supplement			\$957,429	
Supplement for Unique Student Needs				\$44,656,349
			Funding	
Variance from Provincial Average	-	\$221		
Estimated Number of Educators	1,357.385		-\$299,982	
	Enrolment	Funding Level	Funding	Total Supplement
FTE Distribution	24,432.9375	\$180.33	\$4,405,992	
Supplement for Salary Differential				\$4,106,010
Supplement for Unique Geographic Factors				\$8,024,161
Funding Protection				\$0
Curriculum and Learning Support Fund				\$217,985
September 2023 Enrolment Count, Total				\$267,396,666

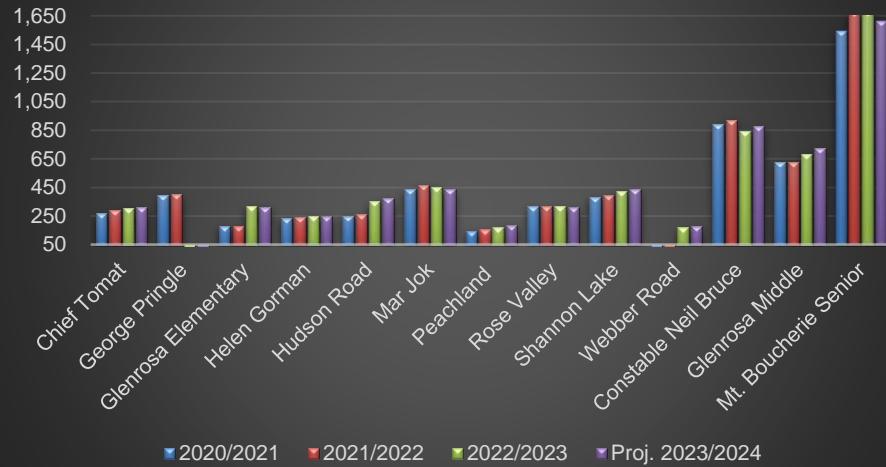
School District 23 (Central Okanagan)

July 2023 Enrolment Count				
	Enrolment	Funding Level	Funding	Total Supplement
Summer Learning Grade 1-7	200	\$245	\$49,000	
Summer Learning Grade 8-9	0	\$245	\$0	
Summer Learning Grade 10-12	0	\$490	\$0	
Supplemental Summer Learning Funding			\$13,852	
Cross-Enrolment, Grade 8 and 9	0	\$490	\$0	
Summer Learning, Total				\$62,852
February 2024 Enrolment Count				
	Enrolment	Funding Level	Funding	Total Supplement
School-Age FTE - Continuing Education	10.0000	\$8,625	\$86,250	
Adult FTE - Continuing Education	2.0000	\$5,505	\$11,010	
K-Gr 9 School-Age FTE - Online Learning	5.0000	\$3,480	\$17,400	
Gr 10-12 School-Age FTE - Online Learning	50.0000	\$6,960	\$348,000	
Adult FTE - Online Learning	10.0000	\$5,505	\$55,050	
Level 1 Special Needs Enrolment Growth	0	\$24,535	\$0	
Level 2 Special Needs Enrolment Growth	35	\$11,640	\$407,400	
Level 3 Special Needs Enrolment Growth	0	\$5,880	\$0	
Newcomer Refugees	125.0000	\$4,313	\$539,125	
ELL Supplement - Newcomer Refugees	25	\$868	\$21,700	
February 2024 Enrolment Count, Total				\$1,485,935
May 2024 Enrolment Count				
	Enrolment	Funding Level	Funding	Total Supplement
School-Age FTE - Continuing Education	5.0000	\$8,625	\$43,125	
Adult FTE - Continuing Education	0.0000	\$5,505	\$0	
K-Gr 9 School-Age FTE - Online Learning	0.0000	\$2,320	\$0	
Gr 10-12 School-Age FTE - Online Learning	40.0000	\$6,960	\$278,400	
Adult FTE - Online Learning	5.0000	\$5,505	\$27,525	
May 2024 Enrolment Count, Total				\$349,050
2023/24 Full-Year Estimated Total				\$269,294,503
Estimated 2023/24 Operating Grant from Indigenous Services Canada				\$1,329,754
Estimated 2023/24 Operating Grant from Ministry of Education				\$267,964,749

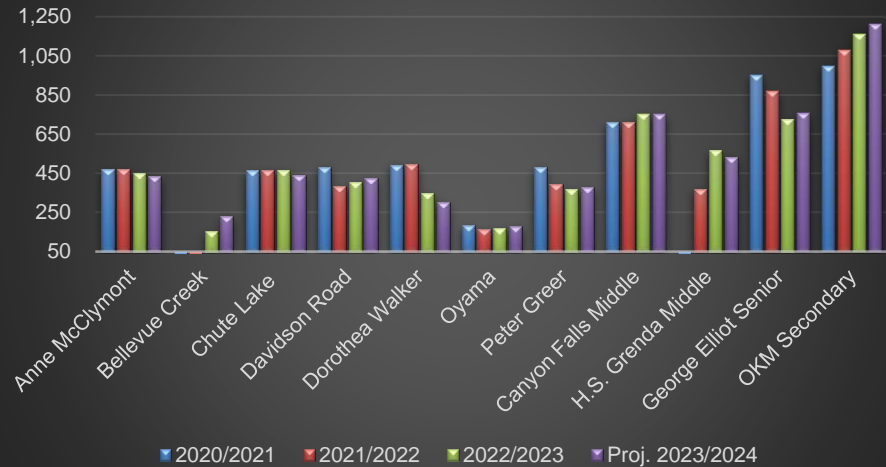
APPENDIX C

Student Enrolment Levels by Family of Schools

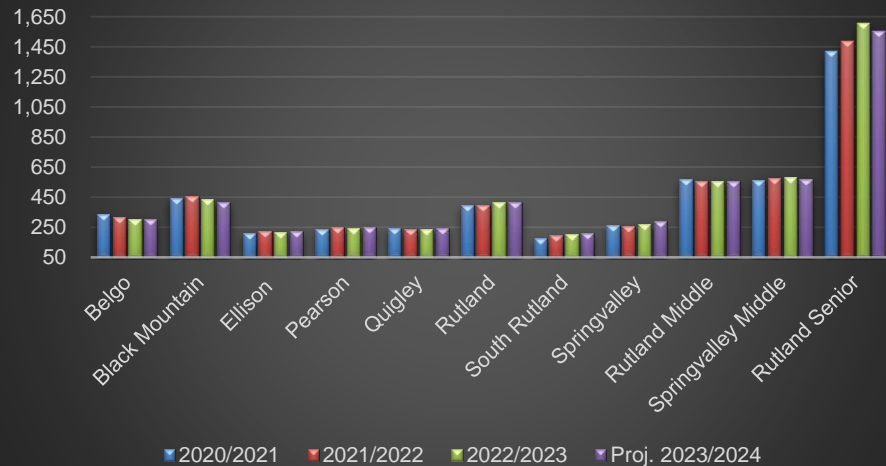
Student Enrolment (Westside)



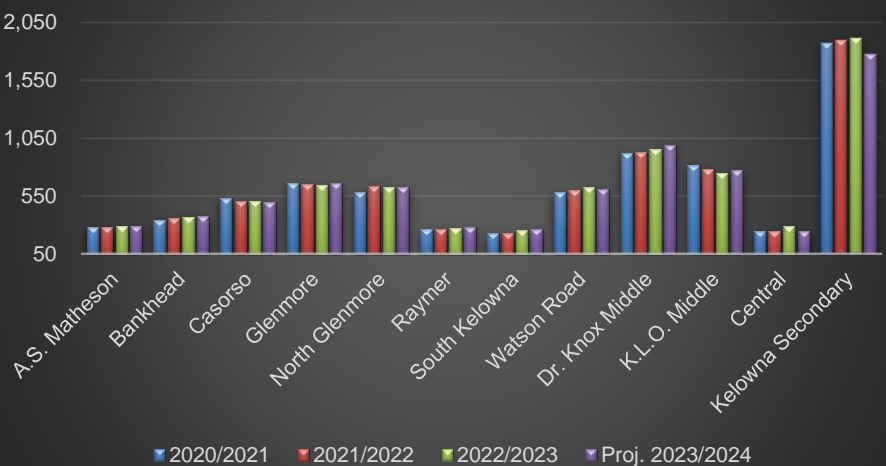
Student Enrolment (Mission & Lake Country)



School Enrolment (Rutland)



Student Enrolment (Central)



APPENDIX C (Continued)

Student Enrolment Levels by Family of Schools

School	2019/2020	2020/2021	2021/2022	2022/2023	Proj. 2023/2024
Chief Tomat	257	267	289	305	311
George Pringle	428	397	406	0	0
Glenrosa Elementary	178	182	179	319	312
Helen Gorman	225	236	241	250	247
Hudson Road	235	252	262	352	373
Mar Jok	437	440	468	453	436
Peachland	159	146	154	168	187
Rose Valley	324	315	317	315	311
Shannon Lake	390	384	397	422	438
Webber Road	0	0	0	169	181
Constable Neil Bruce	888	889	923	841	878
Glenrosa Middle	603	629	625	681	722
Mt. Boucherie Senior	1,503	1,543	1,673	1,679	1,611
Westside Family	5,627	5,680	5,934	5,954	6,007

School	2019/2020	2020/2021	2021/2022	2022/2023	Proj. 2023/2024
Belgo	335	335	317	299	307
Black Mountain	428	442	455	439	416
Ellison	200	208	225	216	221
Pearson	233	234	246	242	253
Quigley	260	242	239	236	244
Rutland	410	393	397	414	415
South Rutland	184	175	194	202	211
Springvalley	255	261	258	272	287
Rutland Middle	563	569	553	557	554
Springvalley Middle	499	564	578	583	567
Rutland Senior	1,426	1,419	1,491	1,605	1,553
Rutland Family	4,793	4,842	4,953	5,065	5,028

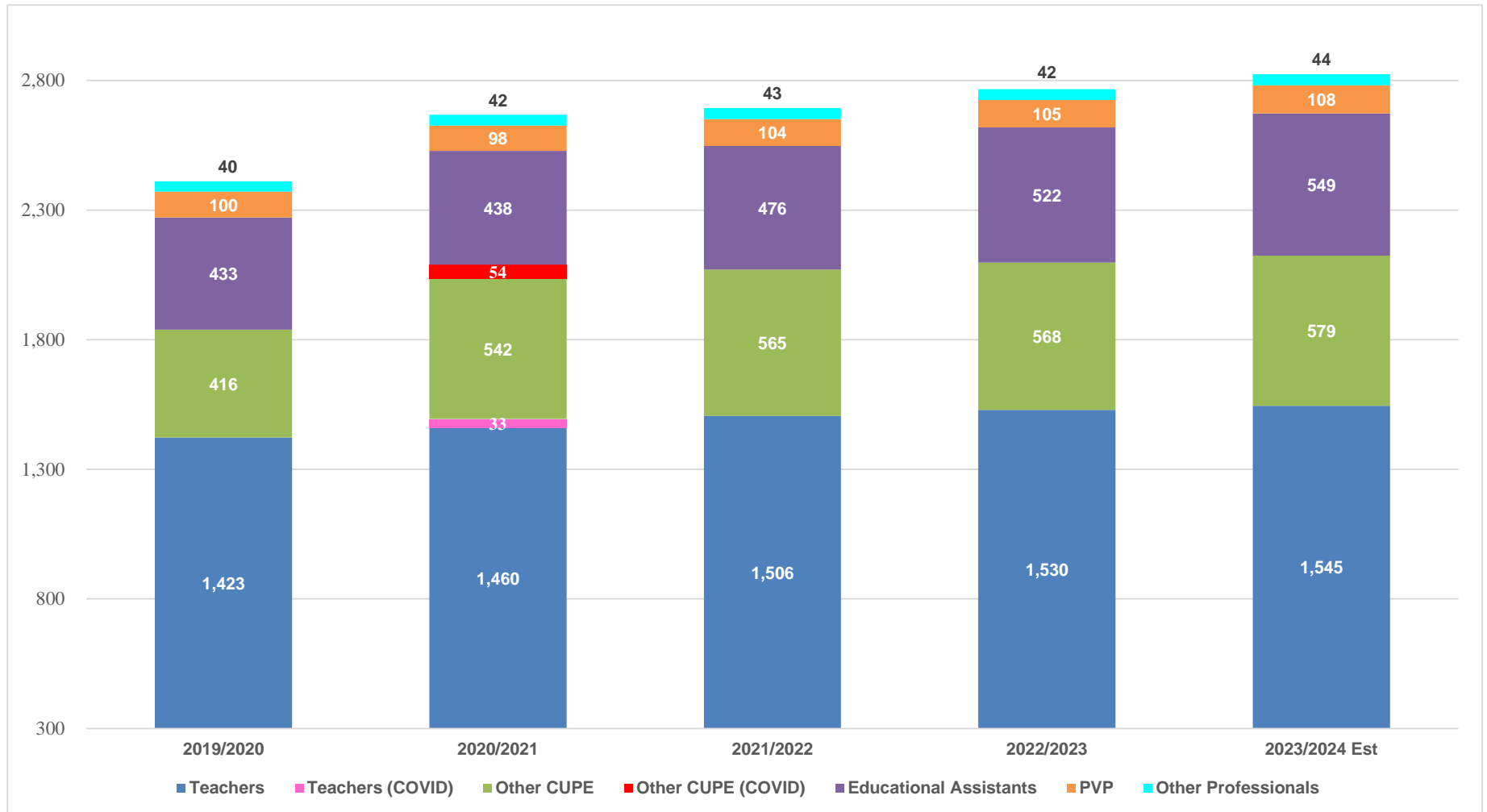
School	2019/2020	2020/2021	2021/2022	2022/2023	Proj. 2023/2024
Anne McClymont	472	470	471	450	433
Bellevue Creek	0	0	0	155	232
Chute Lake	433	463	466	465	440
Davidson Road	480	481	381	403	423
Dorothea Walker	469	491	493	349	299
Oyama	173	184	165	168	179
Peter Greer	464	479	393	370	375
Canyon Falls Middle	453	709	711	751	750
H.S. Grenda Middle	0	0	370	567	532
George Elliot Senior	899	951	868	724	756
OKM Secondary	1,250	999	1,080	1,162	1,214
Mission & Lake Country	5,093	5,228	5,398	5,563	5,633

School	2019/2020	2020/2021	2021/2022	2022/2023	Proj. 2023/2024
A.S. Matheson	290	283	281	290	292
Bankhead	337	342	361	371	376
Casorso	525	528	504	506	498
Glenmore	672	660	656	643	659
North Glenmore	570	587	635	626	629
Raymer	258	265	264	273	276
South Kelowna	232	230	228	252	266
Watson Road	579	587	596	628	610
Dr. Knox Middle	871	921	928	950	988
K.L.O. Middle	814	818	781	745	777
Central	272	247	246	288	243
Kelowna Secondary	1,880	1,868	1,898	1,910	1,776
Central Family	7,299	7,336	7,378	7,482	7,390

APPENDIX D

Multi-Year District Staffing FTE Graph

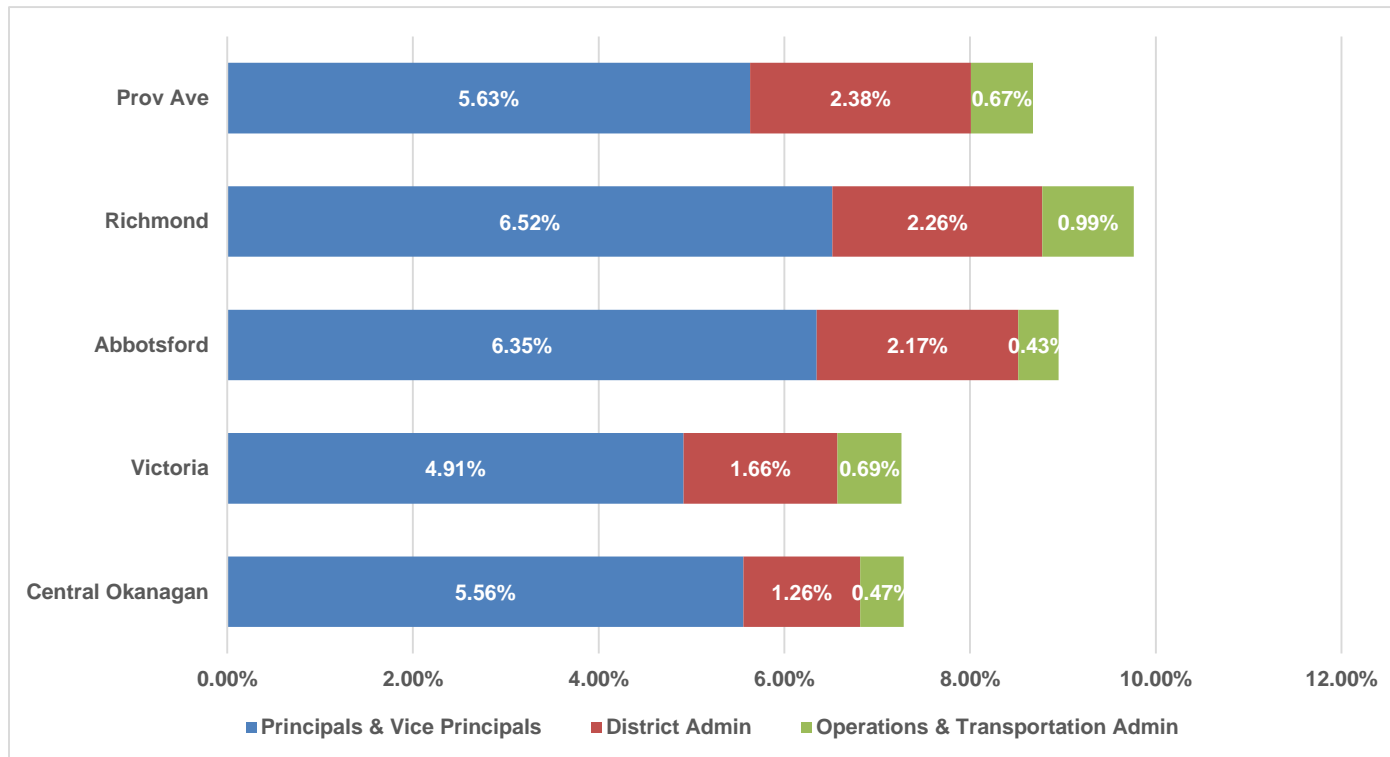
This graph illustrates the full time equivalent (FTE) of the District's staffing by category for the last 5 years + the estimated staffing FTE for the 2023/2024 school year. The 2023/2024 staffing FTE is preliminary and may change.



APPENDIX E

District Administration Comparison Graph

This graph shows both school and District administration as a % of total operating salaries (2021/2022 fiscal year) compared to other comparable size districts and the provincial average. School administration is below two of the comparable size districts and the provincial average and total District administration is below all the comparable size districts and the provincial average. This illustrates the administration efficiency of the District and the District's objective to invest as much funding into schools and classrooms as possible.



APPENDIX F

Do you have any other comments or questions you would like answered regarding the Budget Development for 2023/2024?

[illegible]