

# public agenda

## Regular Board Meeting

June 13, 2017  
12:00 p.m.

Multipurpose Room,  
Education Centre  
1221 8 Street SW,  
Calgary, AB

### R-1: Mission |

Each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

**Conflict of Interest reminder: Trustees must disclose any potential pecuniary interest in any matter before the Board of Trustees, as set forth in the agenda as well as any pecuniary interest in any contract before the Board requiring the Board's approval and/or ratification.**

| Time        | Topic  | Who                        | Policy Ref       | Attachment |
|-------------|--|----------------------------|------------------|------------|
| 12:00 p.m.  | <b>1   Call to Order, National Anthem and Welcome</b>          |                            |                  |            |
|             | <b>2   Consideration/Approval of Agenda</b>                    |                            | GC-2             |            |
|             | <b>3   Awards and Recognitions</b>                             |                            |                  |            |
| 15 mins     | 3.1 Legacy Award   | Board Chair                | GC-3             |            |
|             | <b>4   Results Focus</b>                                       |                            |                  |            |
| 40 mins     | 4.1 R-2: Academic Success – Annual Monitoring                  | D. Stevenson               | R-2; OE-8        | Page 4-1   |
|             | <b>5   Operational Expectations</b>                            |                            |                  |            |
| 20 mins     | 5.1 OE-1: Global Operational Expectation – Annual Monitoring   | D. Stevenson               | OE-1, 8, B/CSR-5 | Page 5-1   |
| 60 mins     | 5.2 Students come first   Budget Report for 2017-18 and beyond | D. Stevenson/<br>B. Grundy | OE-5,6,7,8       | Page 5-13  |
|             | <b>6   Public Comment [ <a href="#">PDF</a> ]</b>              |                            | GC-3.2           |            |
| Max 20 mins | Requirements as outlined in Board Meeting Procedures           |                            |                  |            |

| Time      | Topic  | Who      | Policy Ref | Attachment                                    |
|-----------|--|----------|------------|---|
|           | <b>7   Matters Reserved for Board Action</b>   | Board    | GC-3       |   |
|           | <b>8   Consent Agenda</b>  | Board    | GC-2.6     |   |
|           | 8.1 Approval of Minutes  |          |            |   |
|           | <ul style="list-style-type: none"> <li>▪ Regular Meeting held April 25, 2017</li> <li>▪ Regular Meeting held May 16, 2017</li> <li>▪ Regular Meeting held May 23, 2017</li> <li>▪ Regular Meeting held May 30, 2017</li> </ul> (THAT the Board approves the minutes of the Regular Meetings held April 25, May 16, May 23, and May 30, 2017 as submitted.) |          |            | Page 8-5<br>Page 8-9<br>Page 8-1<br>Page 8-14 |
|           | 8.2 Revision to Schedule of Regular Meetings<br>(THAT the Board approves revisions to the Schedule of Regular Meetings as recommended in the report.)  |          | GC-2, 6    | Page 8-62                                     |
|           | 8.3 Items Provided for Board Information   |          | OE-8       |   |
|           | 8.3.1 Correspondence   |          |            | Page 8-50                                     |
|           | 8.3.2 Chief Superintendent's Update  |          | OE-8       | Page 8-17                                     |
|           | 8.3.3 Third Quarter Budget Variance Report for the 2016-17 Budget  |          | OE-5, 6    | Page 8-40                                     |
|           | 8.3.4 Construction Projects Status Report  |          | OE-8, 12   | Page 8-23                                     |
|           | <b>9   In-Camera Session</b>   |          |            |   |
| 3:00 p.m. | <b>10   Adjournment</b>  |          |            |   |
|           | <b>Debrief</b>   | Trustees | GC-2.3     |   |

**Notice |**

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Media may also attend these meetings.

You may appear in media coverage.

Archives will be available for a period of two years.

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For questions or concerns, please contact:

Office of the Corporate Secretary at [corpsec@cbe.ab.ca](mailto:corpsec@cbe.ab.ca)

## Results 2: Academic Success

### CHIEF SUPERINTENDENT CERTIFICATION

With respect to Results 2: Academic Success, the Chief Superintendent certifies that the following information is accurate and complete, and that the organization is:

- Making reasonable progress toward achieving the desired results.
- Making reasonable progress with exception.
- Not making reasonable progress.

Signed: D. Stevenson

Date: May 30/17

David Stevenson, Chief Superintendent

### BOARD OF TRUSTEES ACTION

With respect to Results 2: Academic Success, the Board of Trustees:

- Finds the organization to be making reasonable progress.
- Finds the organization to be making reasonable progress with exception.
- Finds the organization not to be making reasonable progress.

Summary statement/motion of the Board of Trustees:

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Chair, Board of Trustee

Results 2: Each student will be literate and numerate, able to integrate and apply the knowledge, skills, attitudes and competencies acquired across all academic disciplines.

## Introduction |

Results 2: Academic Success establishes the Board of Trustees' values and expectations for the Calgary Board of Education's work in ensuring that students experience success with the subject matter of their learning program and use language, images, symbols and text in a variety of contexts.

The Chief Superintendent's *Reasonable Interpretation Results 2: Academic Success* was approved on June 9, 2015. The Board of Trustees last monitored Results 2: Academic Success on June 14, 2016.

The report presented today represents organizational data available since the last monitoring report, primarily representing the 2015-16 school year<sup>1</sup>. This report provides the Board of Trustees with several types of information.

1. It provides the most recent data for the indicators of the Chief Superintendent's Reasonable Interpretation as approved by the Board of Trustees. This information is presented as part of multi-year data sets where possible and in relation to organizational targets previously approved by the Board of Trustees.

**Note |** Provincial testing and report card data is presented in summary form, having previously been presented to the Board of Trustees in greater detail through subject-specific information reports between November 2016 and April 2017.

2. It identifies whether performance targets for 2015-16 were met and establishes organizational performance targets for 2016-17.
3. In addition to monitoring data there are two attachments and they are:
  - capacity building actions the organization will use to address specific improvement goals within the Results 2 policy; and
  - examples of ways in which individual students have experienced academic success. These examples are provided in the students' own words.

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<sup>1</sup> Alberta Education provides information on the High School Completion Rate, the Diploma Examination Participation Rate and the Rutherford Scholarship Eligibility Rate one year behind other data sets. For those measures the most current information represents the 2014-15 school year.

Performance targets are based on a number of factors, including the extent of data available, patterns within that data, the level of results already attained, and for measures with provincial comparisons, the assessment of performance provided by Alberta Education. For CBE-specific indicators, the level of achievement and level of stability within the individual results has been factored into determining where continued success and/or improvement become the priority for that indicator within the overall Results policy.

## Monitoring Information |

### Executive Summary |

Monitoring information within this report informs the Board of Trustees of the success of Calgary Board of Education students with the knowledge, skills, processes and application of learning across the subject areas of their instructional programs.

Data from the 2015-16 school year continues to show strong levels of performance within the Calgary Board of Education across the sub-section of Results 2: Academic Success.

The Calgary Board of Education strives to be a high achieving and leading jurisdiction. Over a number of years it has established patterns of achievement and an organizational expectation that CBE student learning results will be at or above provincial rates of achievement and consistent or improving across time.

Some complexities in interpreting the data for both the CBE and the province carry forward from 2012-13 when flooding in Southern Alberta led to the cancellation of a number of Provincial Achievement Tests (PAT) and Diploma Examinations in June 2013. This particularly impacts the interpretation of multi-year data and the "improvement" component of Alberta Education's assessment of PAT and Diploma Examination information. The full value of comparisons to previous 3-year averages will be regained at the completion of the 2016-17 school year when there are once again three years of continuous data against which to make that comparison.

The Chief Superintendent's certification of reasonable progress is offered in relation to the overall Results policy. Student learning in the Calgary Board of Education is strong and progressing across grade levels, disciplines and course content of the Alberta programs of study.

Reasonable progress in the area of Academic Success is led by *High* level of achievement in High School Completion Rates, *Intermediate to Very High* levels of student achievement on provincial tests and by high levels of achievement in school-based assessments of student learning. Improvement was demonstrated in six of the subjects for which student report card results are collected including the two key areas of Language Arts and Mathematics. The collective advancement towards achieving the desired results is also evident in the accomplishment of nine of targets for the 2015-16 school year, including those based on student-provided evidence.

The following summary of the sub-section of Results 2: Academic Success provides an overview of the results for each indicator. For each specific target for 2015-16, it is noted if the previously set target has been met or not met. More specific information for each section of the Results policy and each indicator are included within the section of this report labeled "Evidence of Reasonable Progress" (see pages 5 to 26).

2.1 Students will achieve at individually and appropriately challenging levels of complexity, demonstrating the higher order thinking skills of knowledge, comprehension, application, analysis, synthesis, evaluation and creativity, based on the following disciplines:

- English Language Arts
- Mathematics
- Science
- Social Studies
- Physical Education
- Arts
- Languages

|                                   |                          |
|-----------------------------------|--------------------------|
| Indicator 1: Target met           | Indicator 6: Target met  |
| Indicator 2: Target met           | Indicator 7: Target met  |
| Indicator 3: Target met           | Indicator 8: Target met  |
| Indicator 4: Target met           | Indicator 9: Target met  |
| Indicator 5: Target partially met | Indicator 10: Target met |

## Evidence of Reasonable Progress |

### Students will:

2.1 Achieve at individually and appropriately challenging levels of complexity, demonstrating the higher order thinking skills of knowledge, comprehension, application, analysis, synthesis, evaluation and creativity, based on the following disciplines:

- English Language Arts
- Mathematics
- Science
- Social Studies
- Physical Education
- Arts
- Languages

### Board-approved Interpretation |

The Chief Superintendent interprets *achieve at individually and appropriately challenging levels of complexity* to mean that student learning is directed toward high standards and to the greatest level of achievement possible for each student.

The Chief Superintendent interprets *knowledge, comprehension, application, analysis, synthesis, evaluation and creativity* to mean the multiple forms of thought required for students to achieve their learning objectives.

The Chief Superintendent interprets *higher order thinking skills* to emphasize the most complex forms of thought within each subject area.

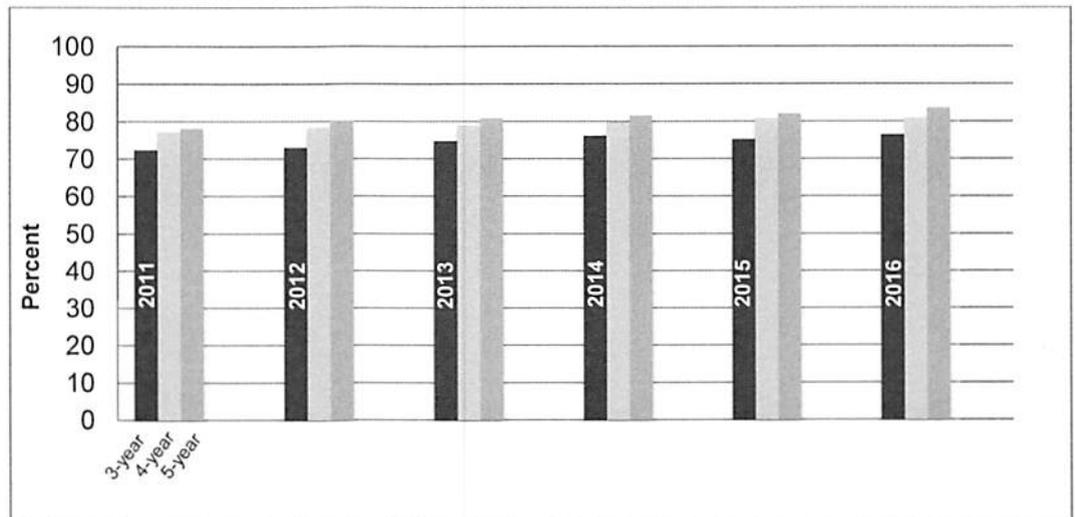
**Board-approved Indicators and 2015-16 results |**

1. Percentage of students completing high school.

Alberta Education’s Accountability Pillar includes an evaluation of an organization’s three-year school completion rate. This rate is based on a cohort of students, adjusted for attrition, between the ages of 14 and 16 entering grade 10 in a given year and completing high school three years later. High school completion rates include students who receive a credential (e.g., a High School Diploma or Certificate of Achievement) and students who do not receive a credential but who transition to a post-secondary institution, an apprenticeship program or who have achieved “academic standing<sup>2</sup>.”

High school completion rates are also calculated at the four-year and five-year point for each cohort group.

| High School Completion Rate |      |      |      |      |      |      |
|-----------------------------|------|------|------|------|------|------|
|                             | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
| 3-year                      | 72.5 | 73.1 | 74.8 | 76.2 | 75.2 | 76.4 |
| 4-year                      | 77.3 | 78.4 | 78.9 | 79.7 | 80.9 | 80.9 |
| 5-year                      | 78.2 | 80.1 | 80.9 | 81.6 | 82.1 | 83.6 |



Alberta Education’s Accountability Pillar Report contextualizes CBE results within those achieved by students across the province.

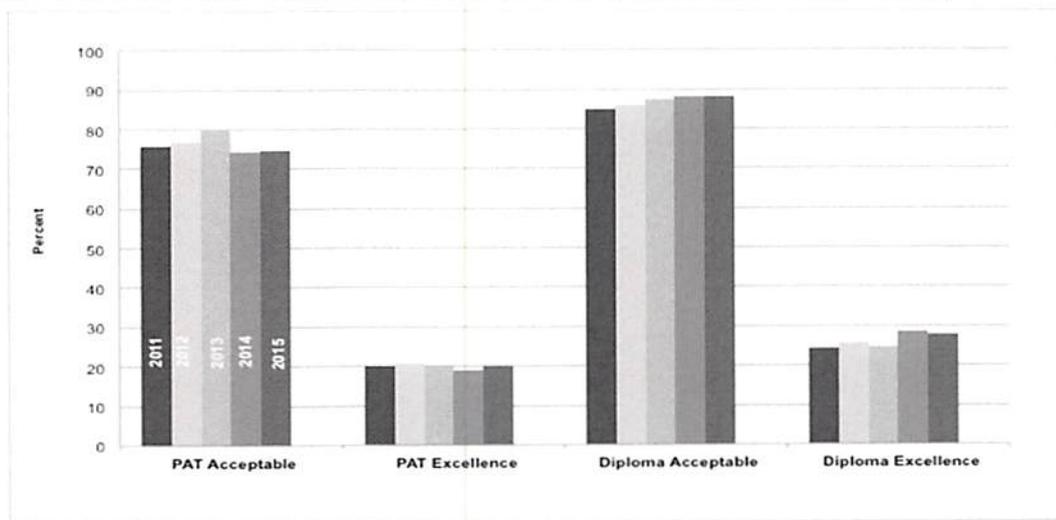
In the “Combined 2017 Accountability Pillar Overall Summary”, the CBE’s three-year High School Completion Rate Achievement Measure Evaluation was *High* and the Improvement Measure Evaluation was *Improved* as compared to the previous 3-year average.

- Target for 2016: continued improvement  
This target was met

<sup>2</sup> Students who have not achieved completion status through any of the other means who have passed a minimum of five grade 12 courses including a Language Arts diploma examination course and three other diploma examination courses.

- Percentage of students who achieve the Acceptable Standard and the Standard of Excellence on Provincial Achievement Tests (PAT) and Diploma Examinations.

| Percentage of CBE students achieving standards on provincial tests |                   |      |                   |                   |      |      |
|--|-------------------|------|-------------------|-------------------|------|------|
|  | 2011 <sup>3</sup> | 2012 | 2013 <sup>4</sup> | 2014 <sup>5</sup> | 2015 | 2016 |
| PAT Acceptable   | 75.7              | 76.8 | 80.2              | 74.4              | 74.8 | 75.5 |
| PAT Excellence   | 19.9              | 20.7 | 20.5              | 19.0              | 19.9 | 20.4 |
| Diploma Acceptable   | 84.8              | 86.2 | 87.3              | 88.3              | 88.0 | 87.2 |
| Diploma Excellence   | 24.4              | 25.6 | 24.7              | 28.6              | 27.7 | 27.3 |



Alberta Education sets two standards against which results are measured on the PAT and Diploma Examinations. To reach the Acceptable Standard on a Diploma Examination, a student must achieve 50% or more. To reach the Standard of Excellence, a student must achieve 80% or more. The specific scores for the Acceptable Standard and Standard of Excellence on Provincial Achievement Tests vary slightly from year to year but are approximately equivalent to the percentage standards used in Diploma Examinations. The percentage of students achieving the Acceptable Standard includes those achieving the Standard of Excellence.

Alberta Education requires that results reported for Provincial Achievement Tests be cohort results. This means that reported results include all students enrolled in the grade, whether they wrote the test or not. Students who were excused from writing or who were absent are included and are considered to not have met the Acceptable Standard. Reporting for Diploma Examination results includes only the students who wrote the examination.

<sup>3</sup> The gathering of information for CBE Results monitoring reports is typically done during the last few months of a school year. Throughout this report, information labeled as 2011 represents the 2010-11 school year, information labeled as 2012 represents the 2011-12 school year, etc.

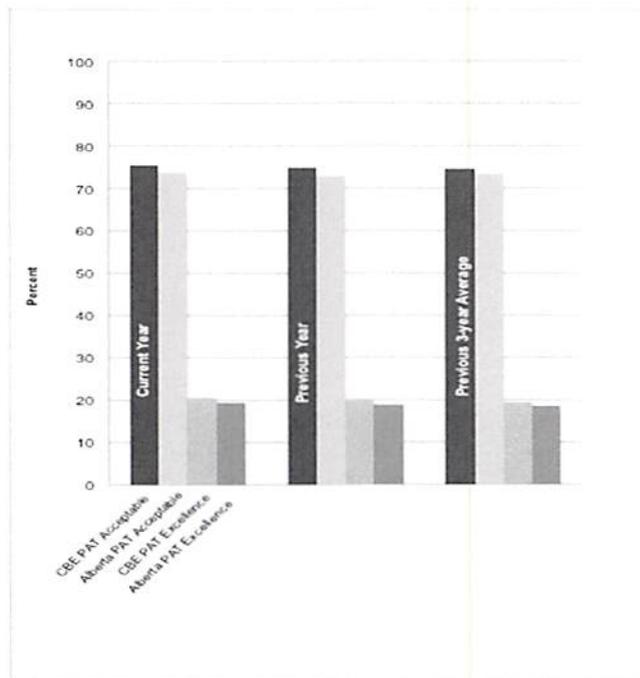
<sup>4</sup> The administration of Provincial Achievement Tests and Diploma Examinations in the Calgary Board of Education was significantly impacted by flooding and a local state of emergency in June 2013. PAT and Diploma Examination results from 2012-13 are to be interpreted with caution.

<sup>5</sup> Grade 3 Provincial Achievement Tests are no longer administered in Alberta. The calculation for PAT results from 2013-14 onward is not directly comparable to results from prior years.

The previous table and graph represents the combined measure of CBE results across the grades and subject areas in which students write PATs and Diploma Examinations.

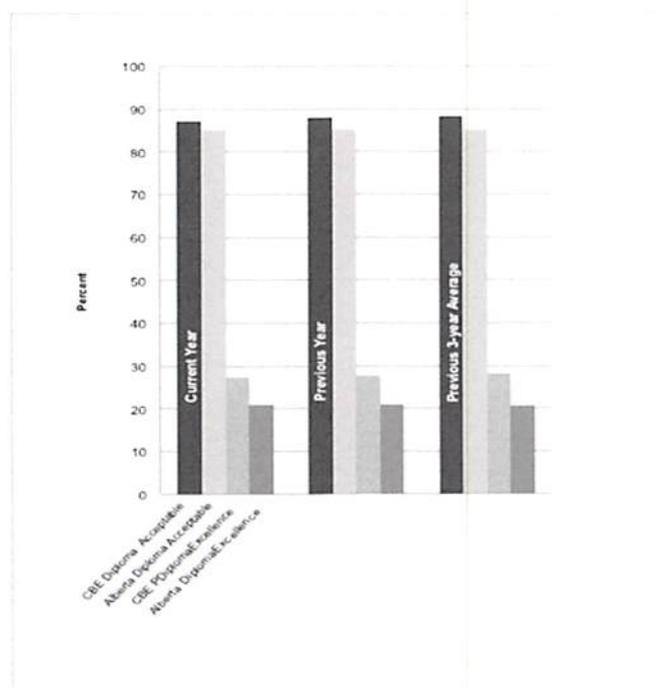
Alberta Education's standard practice in determining the level of improvement demonstrated by a jurisdiction is to compare the current year's results to the previous 3-year average of results. For 2015-16, the Calgary Board of Education's "previous 3-year average" for both Provincial Achievement Tests and Diploma Examinations is a modified two-year average as it includes data from the 2013-14 and 2014-15 but does not include data from 2012-13 due to the June 2013 flood.

| Percentage of students achieving standards<br>Provincial Achievement Tests |                         |                          |  |
|--|-------------------------|--------------------------|--|
|  | 2015-16<br>Current Year | 2014-15<br>Previous Year | 2013-15<br>Previous 3-year<br>Average <sup>6</sup> |
| CBE PAT Acceptable   | 75.5                    | 74.8                     | 74.6   |
| Alberta PAT Acceptable   | 73.6                    | 72.9                     | 73.4   |
| CBE PAT Excellence   | 20.4                    | 19.9                     | 19.5   |
| Alberta PAT Excellence   | 19.4                    | 18.8                     | 18.6   |



<sup>6</sup> In the CBE this is a previous 2-year average due to the flood in June 2013.

| Percentage of students achieving standards<br>Diploma Examinations |                         |                          |  |
|--|-------------------------|--------------------------|--|
|  | 2015-16<br>Current Year | 2014-15<br>Previous Year | 2013-15<br>Previous 3-year<br>Average <sup>7</sup> |
| CBE Diploma Acceptable   | 87.2                    | 88.0                     | 88.2   |
| Alberta Diploma Acceptable   | 85.0                    | 85.2                     | 85.1   |
| CBE Diploma Excellence   | 27.3                    | 27.7                     | 28.1   |
| Alberta Diploma Excellence   | 21.0                    | 21.0                     | 20.5   |



### Overall

Calgary Board of Education results for both Provincial Achievement Tests and Diploma Examinations for 2015-16 exceed provincial results at the Acceptable Standard and at the Standard of Excellence.

The Accountability Pillar Report evaluates CBE Achievement Measure Evaluation on Provincial Achievement Tests as *Intermediate* at the Acceptable Standard and *High* at the Standard of Excellence. It evaluates CBE Achievement Measure Evaluation results on Diploma Examinations as *High* at the Acceptable Standard and *Very High* at the Standard of Excellence.

The Accountability Pillar Report Improvement Measure Evaluation shows CBE results for 2015-16 Provincial Achievement Tests as *Improved* over the “previous 3-year average” results at both the Acceptable Standard and the Standard of Excellence.

<sup>7</sup> In the CBE this is a previous 2-year average due to the flood in June 2013.

CBE Diploma Examinations Improvement Measure Evaluation results are *Declined Significantly* in relation to the “previous 3-year average” at the Acceptable Standard and *Declined* at the Standard of Excellence.

Effective September 2015, weighting on the diploma examinations was reduced to 30% from 50%, impacting the interpretation of the results with previous years. We are seeking to better understand the impact of this change on results.

|                    | At or above provincial results | Consistent or improving across time compared to the Previous 3-year average <sup>8</sup> |
|--------------------|--------------------------------|--|
| PAT acceptable     | above                          | <i>Improved</i>  |
| PAT excellence     | above                          | <i>Improved</i>  |
| Diploma acceptable | above                          | <i>Declined Significantly</i>  |
| Diploma excellence | above                          | <i>Declined</i>  |

- Target for 2016: Achievement rates on provincial tests<sup>9</sup> to be at or above the provincial achievement rates and consistent or improving across time.

Given that six of the eight results are in line with the target and that the change in weighting of the diploma examination mark may have an effect on the results, and that the “previous 3-year average” is a previous 2-year average for the CBE because of the flood of 2013, this target has effectively been met.

On June 14, 2016 the Board was presented with the 2014-15 Results 2: Academic Success Monitoring Report. On June 21, 2016 the Board determined that reasonable progress had been made and directed the Chief Superintendent to provide improvement targets to address areas of concern within Results 2. A Results 2 Monitoring Follow-up Report was presented to the Board on November 29, 2016. The 2016-17 revised targets from that report are included below.

- Overall percentage of self-identified Indigenous students in Grade 6 and 9 who achieved the Acceptable Standard on Provincial Achievement Tests (overall cohort results)  
Target for 2017: 44.2%
- Overall percentage of self-identified Indigenous students in Grade 6 and 9 who achieved the Standard of Excellence on Provincial Achievement Tests (overall cohort results)  
Target for 2017: 4.9%
- Overall percentage of self-identified Indigenous students who achieved the Acceptable Standard on Diploma Examinations (overall cohort results)  
Target for 2017: 88.6%
- Overall percentage of self-identified Indigenous students who achieved the Standard of Excellence on Diploma Examinations (overall cohort results)  
Target for 2017: 20.5%

<sup>8</sup> In the CBE this is a previous 2-year average due to the flood in June 2013.

<sup>9</sup> This goal is specific to Provincial Achievement Tests and Diploma Examinations that are considered to be stable and statistically reliable by Alberta Education.

These targets are based on CBE calculations of results that could be statistically considered to be improved in relation to the average of the previous three years' results. The comparison of a single year's result in relation to its previous three-year average is consistent with Alberta Education's evaluation of overall PAT or Diploma Examination results.

The following test-specific information is provided as additional context for the monitoring information listed above. It has previously been provided in the October 11, 2016 Summary of the 2015-16 Provincial Achievement Test and Diploma Examination Results Report and the individual subject-specific Information Reports provided to the board between November 2016 and April 2017.

### **English Language Arts (ELA)**

- CBE student results on the Grade 6 English Language Arts Provincial Achievement Test were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Grade 9 English Language Arts Provincial Achievement Test were within 0.3 and 0.2 percentage points of the provincial results at both the Acceptable Standard and Standard of Excellence respectively.
- CBE student results on the Grade 9 English Language Arts Knowledge and Employability Provincial Achievement Test were within 1.9 and 1.7 percentage points of the provincial results at the Acceptable Standard and Standard of Excellence respectively.
- CBE student results on the English Language Arts 30-1 and 30-2 Diploma Examinations were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- In the 2014-15 Results 2 Monitoring Report, student results in Grade 9 English Language Arts at the Acceptable Standard were targeted to show no further decline in 2016 and to be showing improvement in relation to the previous 3-year average by 2018. The results in 2015-16 showed an increase over the 2014-15 results of 0.6 percentage points. The target has been met.

### **French Language Arts (FLA)**

- CBE student results on the Grade 6 French Language Arts Provincial Achievement Tests were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Grade 9 French Language Arts Provincial Achievement Tests were above the provincial results at the Acceptable Standard and below at the Standard of Excellence.
- CBE student results on the French Language Arts 30-1 Diploma Examinations were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- In the 2014-15 Results 2 Monitoring Report, student results on Grade 9 French Language Arts at the Standard of Excellence were targeted to show no further decline in 2016 and to be showing improvement in relation to the previous 3-year average by 2018. The results in 2015-16 showed a decrease from the 2014-15 results of 0.5 percentage points. This target has not been met. Student results in French Language Arts 30-1 at the Standard of Excellence were targeted to increase by at least 1.0 percentage points for 2016. The results in 2014-15 were 10.8% and the results in 2015-16 were 12.1% which is an increase of 1.3 percentage points so this target has been met.

## Mathematics

- CBE student results on the Grade 6 and 9 Mathematics Provincial Achievement Tests were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Grade 9 Mathematics Knowledge and Employability Provincial Achievement Test was below the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Mathematics 30-1 and 30-2 Diploma Examinations were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- In the 2014-15 Results 2 Monitoring Report, student results on the Grade 6 Mathematics Provincial Achievement Test at the Standard of Excellence were targeted to show no further decline in 2016, to be above provincial results and to be showing improvement in relation to the previous 3-year average by 2018. The results in 2015-16 showed an increase from the 2014-15 results of 0.5 percentage points and are above the provincial results by 2.0 percentage points. This target has been met. Grade 9 Mathematics Knowledge and Employability Provincial Achievement Test participation rates were to be equal to the provincial participation rate and the achievement of writers at the Acceptable Standard would be at or above the provincial results by 2016. The 2015-16 participation rates were 1.3 percentage points below the provincial rates and the achievement of writers was below the provincial results by 7.9 percentage points. This target was not met.

On June 14, 2016 the Board was presented with the 2014-15 Results 2: Academic Success Monitoring Report. On June 21, 2016 the Board determined that reasonable progress had been made and directed the Chief Superintendent to provide improvement targets to address areas of concern within Results 2. A Results 2 Monitoring Follow-up Report was presented to the Board on November 29, 2016. The 2016-17 revised targets from that report are included below.

In response to the Board of Trustees request for updated targets for Math PAT results, the Results 2 Monitoring: Follow-up Report of November 29, 2016, set the following targets for 2016-17: the percentage of CBE students achieving at the Standard of Excellence on the Grade 6 Mathematics Provincial Achievement Test will be 16.7%; the percentage of CBE students achieving at the Acceptable Standard on the Grade 9 Mathematics Provincial Achievement Test will be 68.0%; and the percentage of CBE students achieving at the Acceptable Standard on the Grade 9 Mathematics Knowledge and Employability Provincial Achievement Test will be 60.2%

These targets are based on CBE calculations of results that could be statistically considered to be improved in relation to the average of the previous three years' results. The comparison of a single year's result in relation to its previous three-year average is consistent with Alberta Education's evaluation of overall PAT or Diploma Examination results.

### **Science**

- CBE student results on the Grade 6 and 9 Science Provincial Achievement Tests were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Biology 30, Chemistry 30, and Physics 30 Diploma Examinations were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Science 30 Diploma Examinations were within 0.2 and 0.8 percentage points respectively at the Acceptable Standard and the Standard of Excellence.
- In the 2014-15 Results 2 Monitoring Report, student results on the Science 30 Diploma Examination on each standard were to be at or above provincial results and improving. This target was not met.

### **Social Studies**

- CBE student results on the Grade 6 and 9 Social Studies Provincial Achievement Tests were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- CBE student results on the Social Studies 30-1 and 30-2 Diploma Examinations were above the provincial results at both the Acceptable Standard and the Standard of Excellence.
- In the 2014-15 Results 2 Monitoring Report, student results on the Grade 9 Social Studies Knowledge and Employability Provincial Achievement Test at the Acceptable Standard were to be at or above the provincial results. The 2015-16 results were 3.2 percentage points below the provincial results. This target has not been met.

3. Percentage of students meeting learning expectations within each discipline; as measured by student report cards.

| Percentage of students successful <sup>10</sup> with learning outcomes for report card indicators |             |             |             |                    |             |
|---|-------------|-------------|-------------|--------------------|-------------|
| Subject Area  | 2012        | 2013        | 2014        | 2015               | 2016        |
| Arts  | 97.8        | 99.3        | 97.3        | 97.8               | 97.5        |
| CTS/CTF   | 94.3        | 95.1        | 95.9        | 95.8 <sup>11</sup> | 96.0        |
| English Language Arts   | 87.7        | 88.9        | 91.0        | 92.1               | 92.9        |
| French Language Arts  | 92.8        | 94.8        | 95.3        | 96.1               | 96.4        |
| Languages   | 90.0        | 96.5        | 96.9        | 97.5               | 97.5        |
| Mathematics   | 86.6        | 88.5        | 90.1        | 90.6               | 91.1        |
| Physical Education  | 97.9        | 97.5        | 97.4        | 98.1               | 98.0        |
| Science   | 92.8        | 93.3        | 93.1        | 94.3               | 94.7        |
| Social Studies  | 92.4        | 94.2        | 93.0        | 94.4               | 95.1        |
| <b>Overall</b>  | <b>93.3</b> | <b>94.1</b> | <b>94.0</b> | <b>95.3</b>        | <b>95.4</b> |

- Target for 2016: Continued results at or above 95%. This target was met.

The following information is provided as additional context for the monitoring information listed above. It has previously been provided in the Language Arts Information Report of February 14, 2017.

On June 21, 2016 the Board of Trustees identified Grade 1 to 9 report card results with respect to the English Language Arts stem “reads to explore, construct and extend understanding” as an area of concern. In the Results 2 Monitoring: Follow-up Report on November 29, 2016, the targeted result for 2017-18 was set at 93.0%.

The result from 2015-16 for this stem is 92.7%. No specific target was set for 2016-17.

| 2014-15 | 2015-16 | 2016-17 | 2017-18 |
|---------|---------|---------|---------|
| 89.1    | 92.7    |         | 93.0    |

Based on the 2014-15 and 2015-16 results, a target of 91.1% in 2017-18 would be statistically consistent with the calculations that would lead to the result being considered Improved when compared to the previous 2-year average using a chi-square statistical test. [Note](#) | Using the same criteria a result of 91.3% would position our results in the Improved Significantly category. The 2017-18 target of 93.0% would also situate our results in the Improved Significantly category.

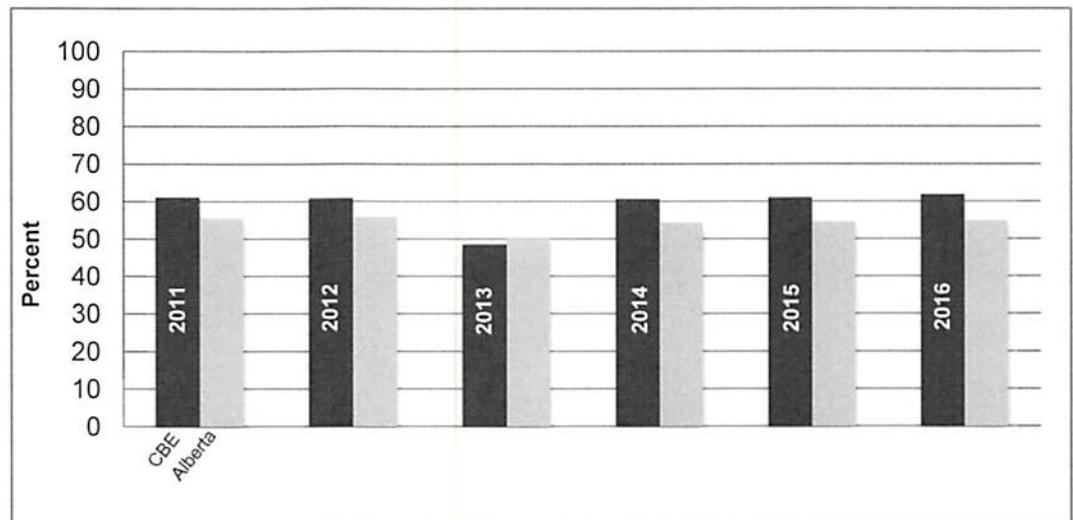
<sup>10</sup> Students are considered successful with the learning outcomes of the Programs of Study if they receive: a 2, 3, or 4 on the report card using a 1-4 scale; a 3, 4, or 5 on a report card using a 1-5 scale; an A, B, or C on a report card using an ABCD scale; or 50% or above on a report card using a percentage scale.

<sup>11</sup> CTF (Career and Technology Foundations) data were included in this subject area beginning with the 2014 results. Prior years refer only to CTS (Career and Technology Studies)

4. Percentage of students participating in 4 or more Diploma Examinations within three years of starting high school.

The Diploma Examination Participation Rate is the percentage, adjusted for attrition, of students in the Grade 10 cohort who have written four or more diploma examinations by the end of their third year in high school. It is a measure used by Alberta Education as an indicator of Student Learning Achievement in the Accountability Pillar.

| Diploma Examination Participation Rate |      |      |      |      |      |      |
|--|------|------|------|------|------|------|
|  | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
| CBE                                    | 61.1 | 60.8 | 48.5 | 60.7 | 61.0 | 61.9 |
| Alberta                                | 55.6 | 55.9 | 50.1 | 54.4 | 54.6 | 54.9 |



CBE's rate is 7.0 percentage points above the provincial rate. In the "Combined 2017 Accountability Pillar Overall Summary", the CBE's Diploma Exam Participation Rate (4+ Exams) was *High* and the Improvement Measure Evaluation was *Improved* as compared to the previous 3-year average.

- Target for 2016: CBE's Diploma Examination Participation Rate is at or above the provincial rate and consistent or improving across time. This target was met

5. Percentage of students eligible for the Rutherford Scholarship.

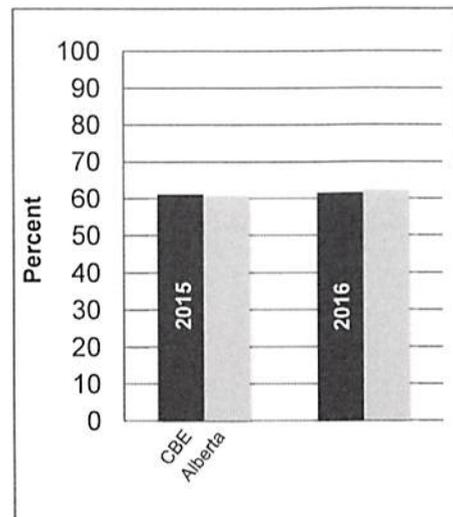
Rutherford Scholarships recognize and reward student achievement in grades 10, 11 and 12. The scholarships are awarded to students who achieve at least 75% in specific groupings of courses at the 10, 20 and/or 30 course level.

The following tables show the historical Rutherford Scholarship Eligibility Rate and then the new table created due to the change from previous data source systems to Provincial Approach to Student Information (PASI).

Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), Rutherford Scholarship Eligibility Rate results established a new baseline for jurisdictional and provincial data. As a result, Alberta Education has not rated this measure in the May 2017 Accountability Pillar update.

| Historical Rutherford Scholarship Eligibility Rate |      |      |      |      |      |
|--|------|------|------|------|------|
|  | 2010 | 2011 | 2012 | 2013 | 2014 |
| CBE  | 58.6 | 60.4 | 59.0 | 59.5 | 61.0 |
| Alberta  | 59.6 | 61.3 | 61.5 | 60.9 | 61.2 |

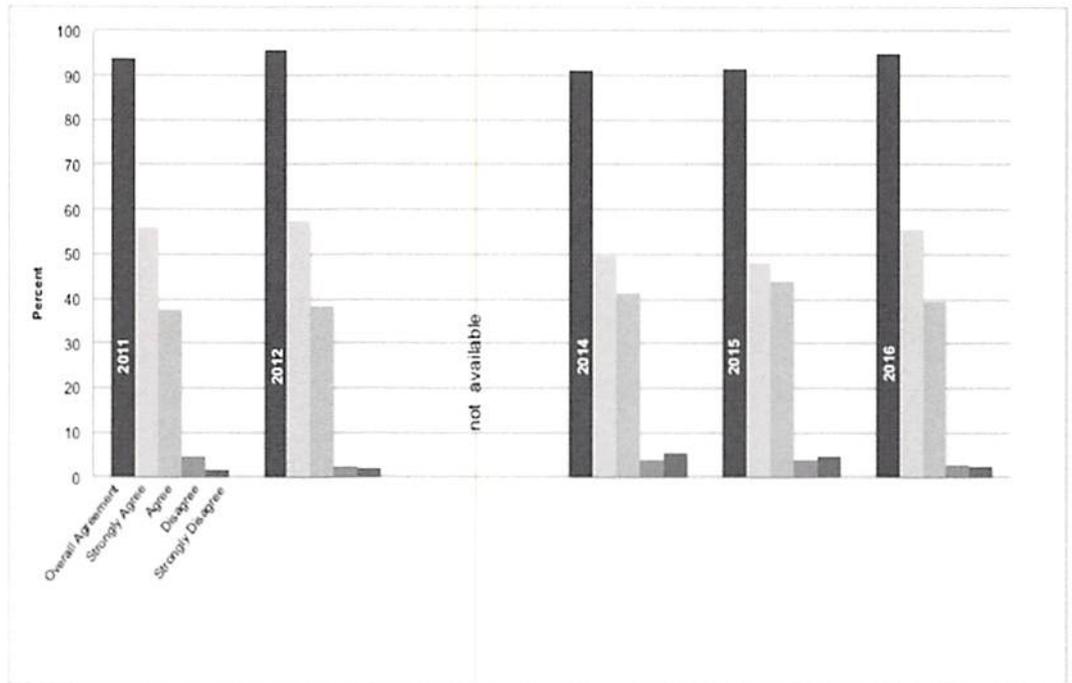
| Rutherford Scholarship Eligibility Rate |      |      |
|---|------|------|
|   | 2015 | 2016 |
| CBE                                     | 61.1 | 61.6 |
| Alberta                                 | 60.8 | 62.3 |



- Target for 2016: CBE's Rutherford Scholarship Eligibility Rate to be at or above the provincial rate and consistent or improving across time. This target was partially met. The CBE's 2016 rate was below the provincial rate by 0.7 percentage points; however, CBE's 2016 rate improved by 0.5 percentage points from the 2015 rate.

6. Percentage of students who report they can use their reading skills in a variety of contexts, both in and out of school; as measured by the Calgary Board of Education student survey.

| Able to use reading skills in a variety of contexts, both in and out of school |      |      |               |      |      |      |
|--|------|------|---------------|------|------|------|
|  | 2011 | 2012 | 2013          | 2014 | 2015 | 2016 |
| Strongly Agree   | 56.1 | 57.3 | not available | 49.6 | 47.9 | 55.4 |
| Agree  | 37.5 | 38.4 |               | 41.4 | 43.8 | 39.5 |
| Disagree   | 4.8  | 2.4  |               | 3.7  | 3.8  | 2.7  |
| Strongly Disagree  | 1.5  | 1.9  |               | 5.3  | 4.5  | 2.4  |
| Overall agreement  | 93.6 | 95.7 |               | 91.0 | 91.7 | 94.9 |

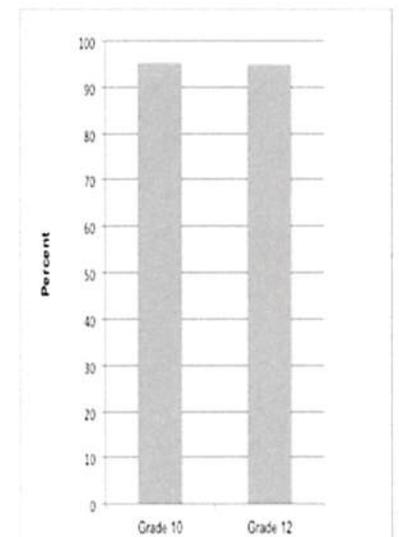
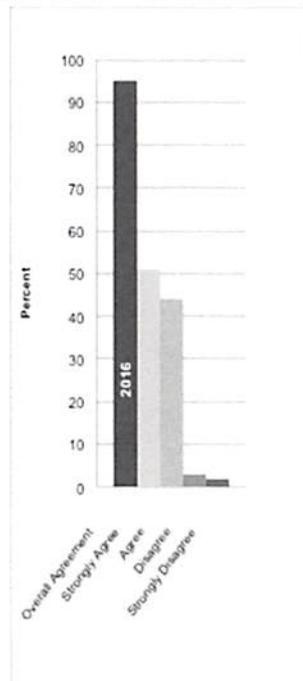


- Target for 2016: 93%  
This target was met.

The previous table, graph and target refer to data gathered from grade 12 students. In 2015-16, the data set for this indicator was expanded to include grade 10 as well as grade 12 students, establishing a new baseline result.

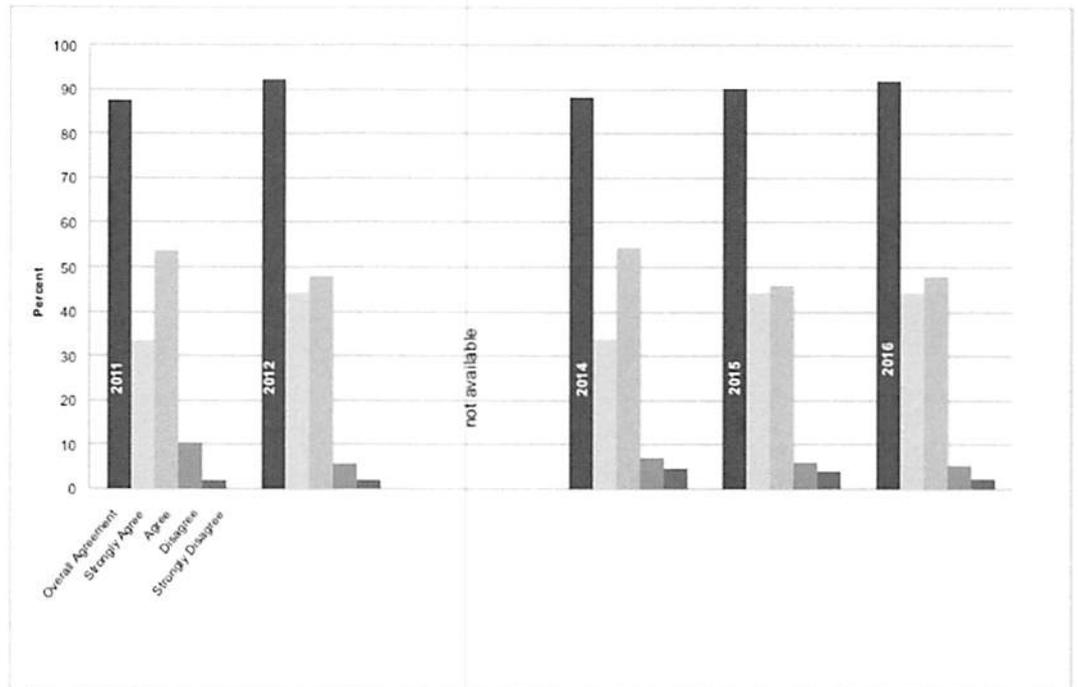
| Able to use reading skills in a variety of contexts, both in and out of school |      |
|--|------|
|  | 2016 |
| Strongly Agree   | 50.9 |
| Agree  | 44.2 |
| Disagree   | 3.0  |
| Strongly Disagree  | 2.0  |
| Overall agreement  | 95.1 |

| Overall Agreement | 2016 |
|-------------------|------|
| Grade 10          | 95.2 |
| Grade 12          | 94.9 |



7. Percentage of students who report they can use their writing skills in a variety of contexts, both in and out of school; as measured by the Calgary Board of Education student survey.

| Able to use writing skills in a variety of contexts, both in and out of school |      |      |               |      |      |      |
|--|------|------|---------------|------|------|------|
|  | 2011 | 2012 | 2013          | 2014 | 2015 | 2016 |
| Strongly Agree   | 33.6 | 44.4 | not available | 33.7 | 44.3 | 44.1 |
| Agree  | 53.9 | 47.9 |               | 54.4 | 45.9 | 48.0 |
| Disagree   | 10.5 | 5.7  |               | 7.1  | 5.9  | 5.4  |
| Strongly Disagree  | 1.9  | 2.0  |               | 4.7  | 3.9  | 2.5  |
| Overall agreement  | 87.5 | 92.3 |               | 88.1 | 90.2 | 92.1 |

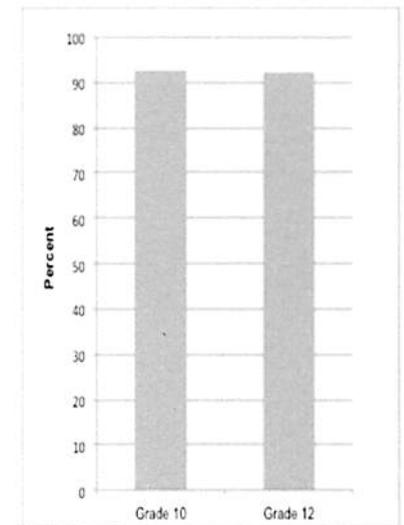
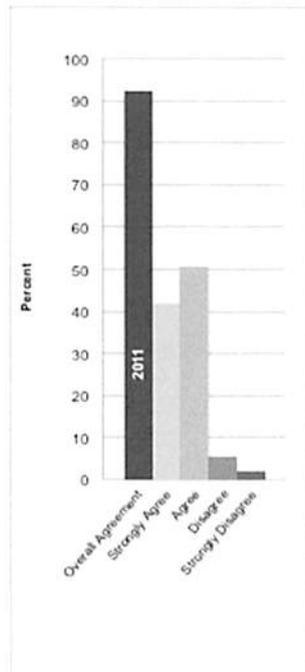


- Target for 2016: Continued results at or above 90%. This target was met.

The previous table, graph and target refer to data gathered from grade 12 students. In 2015-16, the data set for this indicator was expanded to include grade 10 as well as grade 12 students, establishing a new baseline result.

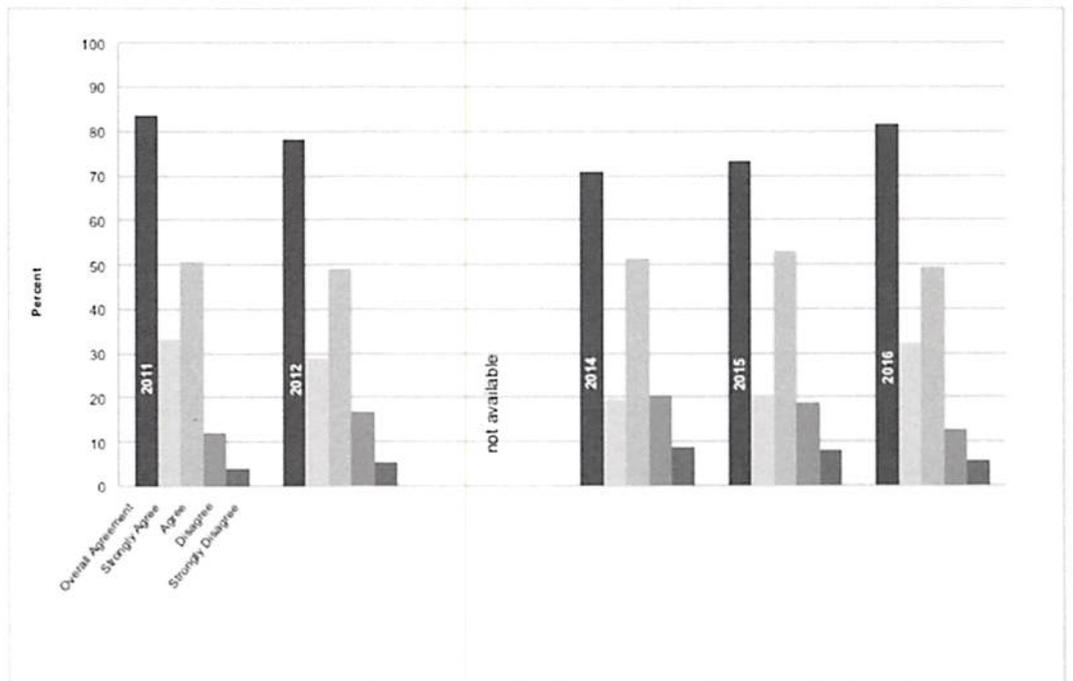
| Able to use writing skills in a variety of contexts, both in and out of school |      |
|--|------|
|  | 2016 |
| Strongly Agree   | 41.8 |
| Agree  | 50.6 |
| Disagree   | 5.5  |
| Strongly Disagree  | 2.1  |
| Overall agreement  | 92.4 |

| Overall Agreement | 2016 |
|-------------------|------|
| Grade 10          | 92.6 |
| Grade 12          | 92.1 |



8. Percentage of students who report they use their mathematics skills in a variety of contexts, both in and out of school; as measured by the Calgary Board of Education student survey.

| Able to use mathematics skills in a variety of contexts, both in and out of school |      |      |               |      |      |      |
|--|------|------|---------------|------|------|------|
|  | 2011 | 2012 | 2013          | 2014 | 2015 | 2016 |
| Strongly Agree   | 33.1 | 29.0 | not available | 19.4 | 20.3 | 32.3 |
| Agree  | 50.6 | 49.1 |               | 51.4 | 52.9 | 49.4 |
| Disagree   | 12.2 | 16.6 |               | 20.5 | 18.7 | 12.7 |
| Strongly Disagree  | 4.1  | 5.4  |               | 8.8  | 8.1  | 5.6  |
| Overall agreement  | 83.7 | 78.1 |               | 70.8 | 73.2 | 81.7 |

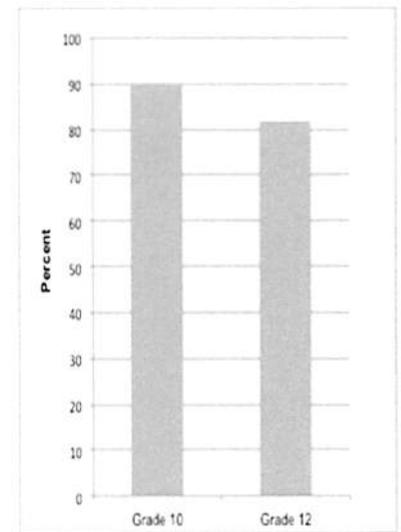
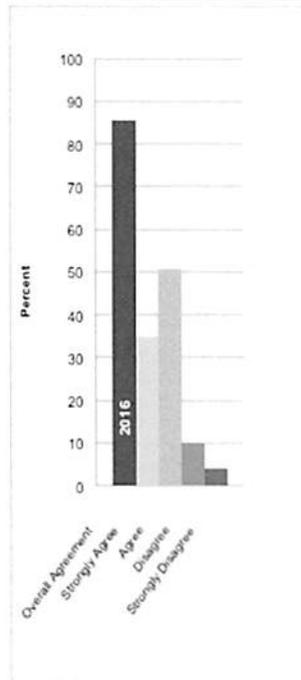


- Target for 2016: 75%  
This target was met.

The previous table, graph and target refer to data gathered from grade 12 students. In 2015-16, this data set for this indicator was expanded to include grade 10 as well as grade 12 students, establishing a new baseline result.

| Able to use mathematics skills in a variety of contexts, both in and out of school |      |
|--|------|
|  | 2016 |
| Strongly Agree   | 35.0 |
| Agree  | 50.7 |
| Disagree   | 10.1 |
| Strongly Disagree  | 4.2  |
| Overall agreement  | 85.7 |

| Overall Agreement | 2016 |
|-------------------|------|
| Grade 10          | 89.7 |
| Grade 12          | 81.7 |



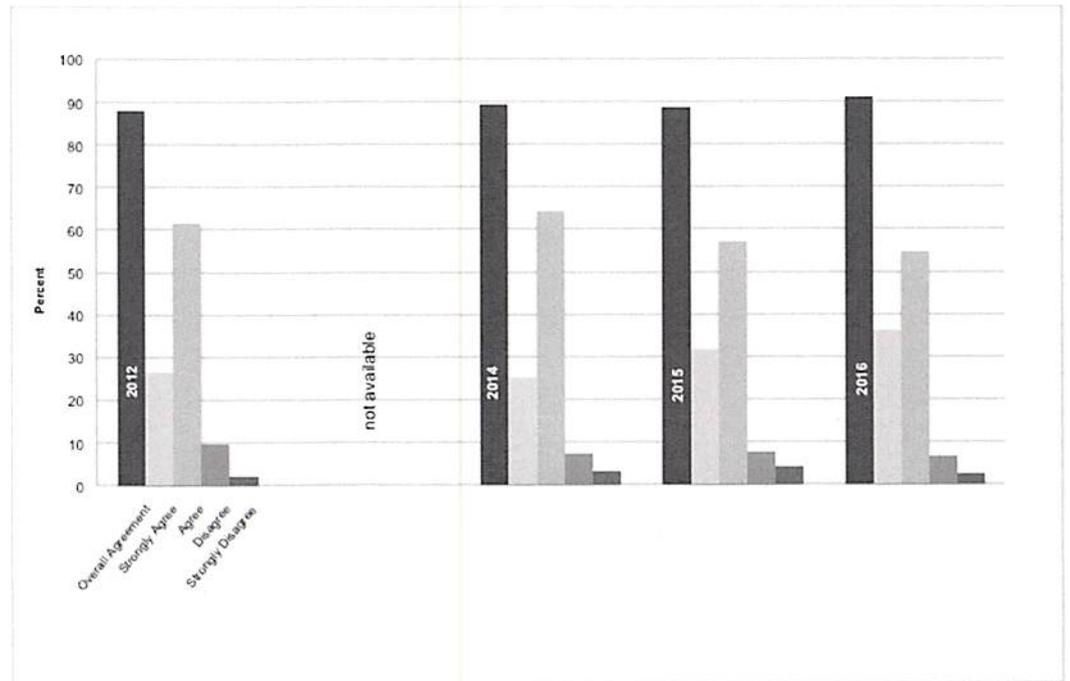
- Target for 2017: The combined results at or above 85% with Grade 12 results at or above 83%.

For the Grade 12 results, a target of 76.5% would keep us within the *Improved* category when compared to the previous 3-year average using a chi-square statistical test. While this would be reasonable progress we set a target based on maintaining or improving the current year result.

Since this is the first year of data including grade 10s, there is no a previous 3-year average to which to compare.

9. Percentage of students who report they can evaluate critically complex information and ideas; as measured by the Calgary Board of Education student survey.

| I can evaluate critically complex information and ideas |      |               |      |      |      |
|---|------|---------------|------|------|------|
|   | 2012 | 2013          | 2014 | 2015 | 2016 |
| Strongly Agree  | 26.5 | not available | 25.1 | 31.6 | 36.1 |
| Agree   | 61.6 |               | 64.2 | 56.9 | 54.8 |
| Disagree  | 9.6  |               | 7.4  | 7.5  | 6.4  |
| Strongly Disagree                                       | 2.3  |               | 3.3  | 4.1  | 2.6  |
| Overall agreement                                       | 88.1 |               | 89.3 | 88.5 | 90.9 |

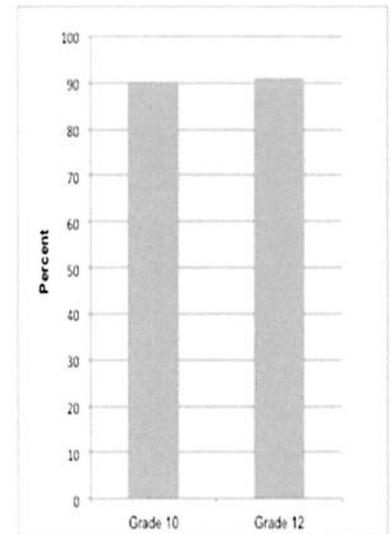
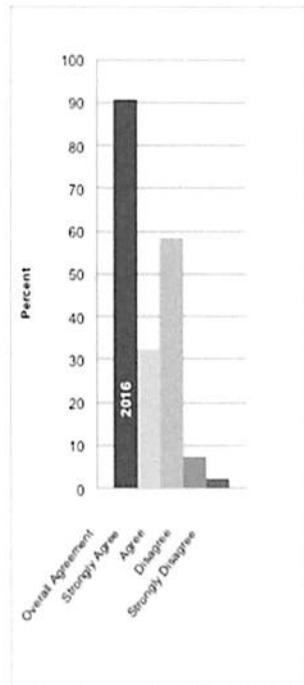


- Target for 2016: 89%  
Target was met.

The previous table, graph and target refer to data gathered from grade 12 students. In 2015-16, the data set for this indicator was expanded to include grade 10 as well as grade 12 students, establishing a new baseline result.

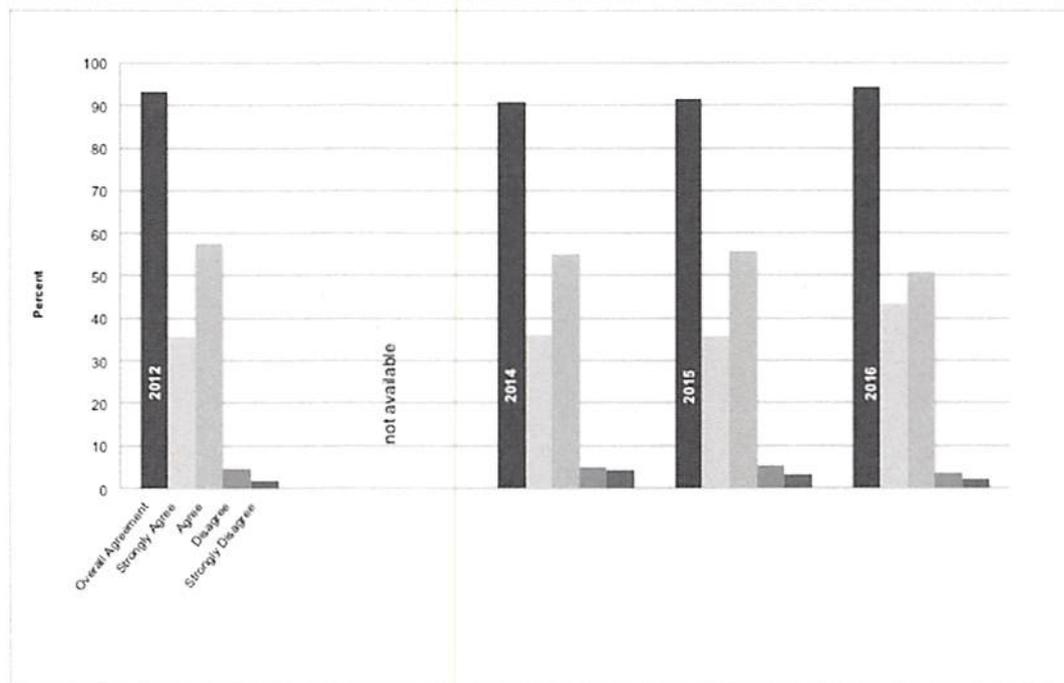
| Able to evaluate critically complex information and ideas |      |
|---|------|
|   | 2016 |
| Strongly Agree  | 32.3 |
| Agree   | 58.3 |
| Disagree  | 7.2  |
| Strongly Disagree   | 2.2  |
| Overall agreement   | 90.6 |

| Overall Agreement | 2016 |
|-------------------|------|
| Grade 10          | 90.4 |
| Grade 12          | 90.9 |



10. Percentage of students who report they can gather information, make connections and use reason to solve problems; as measured by student surveys.

| I can gather information, make connections and use reason to solve problems |      |               |      |      |      |
|---|------|---------------|------|------|------|
|   | 2012 | 2013          | 2014 | 2015 | 2016 |
| Strongly Agree  | 35.8 | not available | 35.9 | 35.7 | 43.5 |
| Agree   | 57.5 |               | 55.0 | 55.8 | 50.8 |
| Disagree  | 4.7  |               | 4.9  | 5.3  | 3.5  |
| Strongly Disagree   | 1.9  |               | 4.3  | 3.2  | 2.3  |
| Overall agreement   | 93.3 |               | 90.9 | 91.5 | 94.3 |

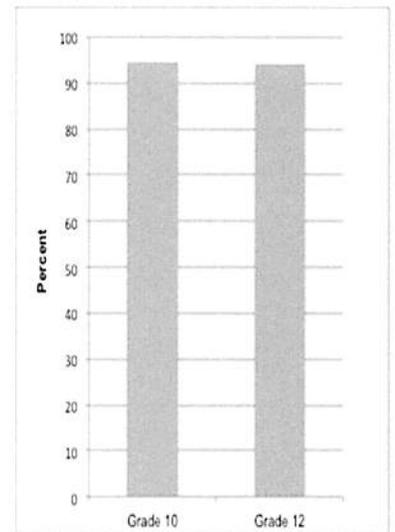
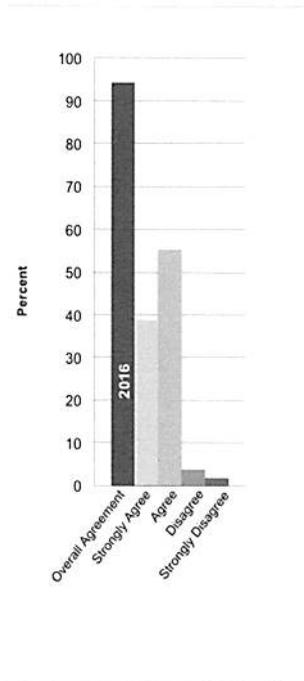


- Target for 2016: 92%  
This target was met.

The previous table, graph and target refer to data gathered from grade 12 students. In 2015-16, this data set for this indicator was expanded to include grade 10 as well as grade 12 students, establishing a new baseline result.

| <b>I can gather information, make connections and use reason to solve problems.</b> |      |
|---|------|
|   | 2016 |
| Strongly Agree  | 38.9 |
| Agree   | 55.4 |
| Disagree  | 3.7  |
| Strongly Disagree   | 1.9  |
| Overall agreement   | 94.4 |

| <b>Overall Agreement</b> | 2016 |
|--------------------------|------|
| Grade 10                 | 94.5 |
| Grade 12                 | 94.3 |



## **ATTACHMENTS**

**Attachment I: Capacity Building Information**

**Attachment II: Student-Contributed Examples of Academic Success in Action**

## **GLOSSARY – Developed by the Board of Trustees**

**Board:** Board of Trustees

**Monitoring Report:** The Board wants to know that its values have driven organizational performance. The Chief Superintendent will present to the Board, for its evaluation, a report that summarized how either compliance has been achieved on Operational Expectations or how reasonable progress has been made in Results. Each monitoring report requires: a re-statement of the full policy, by section; a reasonable interpretation of each section; data sufficient to prove compliance or reasonable progress; and a signed certification from the Chief Superintendent of the status.

**Reasonable Interpretation:** Once the Board has stated its values in policy, the Chief Superintendent is required to “interpret” policy values, saying back to the Board, “here is what the Board’s value means to me.” The Board then judges whether this interpretation is reasonable. In other words, does the Chief Superintendent “get it?” This reasonable interpretation is the first step required in monitoring compliance on Operational Expectations and monitoring reasonable progress on Results.

**Results:** These are our statements of outcomes for each student in our district. The Results policies become the Chief Superintendent’s and the organization’s performance targets and form the basis for judging organization and Chief Superintendent performance.



## attachment | Capacity Building Information

2.1 Achieve at individually and appropriately challenging levels of complexity, demonstrating the higher order thinking skills of knowledge, comprehension, application, analysis, synthesis, evaluation and creativity, based on the following disciplines:

- English Language Arts
- Mathematics
- Science
- Social Studies
- Physical Education
- Arts
- Languages

### Indicator 2

Percentage of students who achieve the Acceptable Standard and the Standard of Excellence on Provincial Achievement Tests (PAT) and Diploma Examinations.

*Factors contributing to success in this area:*

- Data informed decision making at the school level.
- Learning tasks designed for student interest and learning needs.
- Assessment that informs teaching and learning.

### Forward Looking Actions |

- Indigenous Education Strategy
- High School Success Strategy
- Literacy Strategy
- Mathematics Strategy
- Specific support to build success for students in Knowledge and Employability (K&E) courses will be provided through a:
  - focused cross-curricular action plan for this year to improve student success.
  - Professional Learning Network focusing on task design within discipline groups and the sharing of best practices
  - Community of Practice for teachers of K&E Mathematics courses to examine achievement data. A community of practice provides teachers a collaborative opportunity to develop the resources to personalize students' needs to positively impact achievement in K&E Mathematics.
- In Science 30 leveraging existing networks and building new networks to support teacher practice.
- Teacher Leader Task Design sessions.



### Indicator 8

Percentage of students who report they use their mathematics skills in a variety of contexts, both in and out of school; as measured by the Calgary Board of Education student survey.

*Factors contributing to success in this area:*

- Data informed decision making at the school level.
- Learning tasks designed for student interest and learning needs.
- Assessment that informs teaching and learning.

### Forward Looking Actions |

- Improving clarity and coherence in mathematics teaching and learning practices through a unified mathematics strategy including professional learning on analyzing and assessing students' math work, building students' number sense and fluency, learning through problem-solving, high impact instructional strategies and building connections across the different strands of the Mathematics Program of Studies.
- Identify and build assessment resources for key disciplinary literacy outcomes for Mathematics.
- Engage partners in support of mathematics goals.



## Student-Contributed Examples of Academic Success in Action

- This year I've challenged myself to look for not just the achievement and good mark, but also the process of receiving it. According to my math teacher I've been focused more on understanding the concept rather than relying on my memory and algorithms to figure out the answer, which is definitely going to benefit me in the long run. Another example of my academic success would be science class. The subject isn't my strongest but I've learned to enjoy it. For the longest time I would remember dreading the class, because I didn't understand what we were learning and, due to that, my grades weren't too great. Except this year was different, I decided to give science a chance. I tried my very best to participate in class and to listen to what the teacher said. By actively participating, I slowly began to comprehend the subject. I felt much better after receiving the result I wanted. But the process to getting that wasn't easy but worth the effort for academic success.
- One of the skills I am most proud of is my writing ability – a skill that I wholly attribute the development of to my experiences in the CBE. Throughout my high school English courses, I have been able to take what was once a weak point in my academic arsenal and transform it into what I would now consider my greatest strength. This process has been enabled by a fantastically open-ended and exploratory work environment that has encouraged me to become more adventurous and well-rounded in my writing.

I was lucky enough to have the same English teacher in each of my three years of high school English. Even luckier, however, was the degree of creative freedom his teaching environment afforded me. By eschewing traditional English staples such as book reports and grammar and punctuation lessons – we were always told to “Look to the classics” to hone such skills” – in favour of open-ended writing assignments and an unorthodox, but compelling text list from which to work, my teacher was able to foster an excitement for writing. As such, I found myself working harder than ever before, achieving a level of pride in my writing that I had not previously thought possible. Today, I am at a point where I have absolute confidence in my writing ability, and I owe it entirely to my high school Language Arts experience.

- When transitioning between schools it's hard for one to adjust, especially when the move is across the country. Having to embrace a new curriculum, new social settings and cultures, and an entirely new province; change becomes a radicalized concept. When moving a different education system, everyday tasks become more strenuous. Before long I was having a hard time getting above 70% in ELA. However, it was due to my perseverance and work ethic that allowed me to overcome some of these challenges. What had seemed to be the hardest challenge in Grade 10 had become a stepping stool for academic achievement in Grade 11. As a result of my shortcomings in ELA 10-1 AP, I was able to get a 90% in ELA 20-1 AP. This academic success has translated well into my other subjects and has become an outlet for me as a writer. Due to my circumstances and failure, I was able to learn and develop as a writer. I was able to use my now refined writing skills and talents to communicate my thoughts and ideas eloquently in many extracurricular activities. I was able to make my first ever speech in Speech and Debate Club, which my teacher had commented on saying it was “well-written” leading up to the event. It is important for us to fail in order to succeed, and it is in these moments when our failures become our biggest success.



- I have always had a love for books. In fact, I cannot fathom a time where reading was not a passion of mine. As a result of this, creative writing has come with ease for me throughout my years of schooling. As I transitioned from junior high to high school, the need for strong critical essay writing skills became increasingly imperative. For once in my life, I found myself struggling on a writing piece. Thankfully, I had amazingly helpful teachers who walked me through my essays step by step, stopping with suggestions on how to improve. Though at first, I questioned the validity of in-school essays, I now understand their importance in a real-life sense. In the past year I have had to write many pieces for universities and scholarships alike, of which I likely would not have been successful had it not been for the Alberta high school curriculum, the diploma exams, and the relentless support from my teachers in CBE.
- I have always struggled academically with school. I had always been reluctant reading as it takes an enormous amount of focus to take in and comprehend any fictional works, and my thoughts are often a little disorganized on paper. I work hard, but it doesn't reflect in my grades because exams send me into low grade panic and I second guess my answers. Now, all of this can lead to feeling like, "Why bother?" "Why keep coming back only to keep facing the same academic results?" I've had some remarkable teachers who believed in me, saw my struggles and my potential. They made themselves available for extra practice. However, the most remarkable experience for me was in grade 10. I was going into my first high school English class and I was expecting to fail. My teacher began her class with sharing her passion about music and using music to connect to the English curriculum. I felt an immediate connection with her. Music uses poetry, storytelling, and personal reflection. I still needed a lot of help learning how to improve how I wrote. I needed encouragement to slow down, look up word meanings, and take pride in a subject that for so long had drawn on my weaknesses. But with this teacher, I shifted from thinking of academics as a weakness or something wrong with me to something I could get better at; I just needed something to engage me. I have learned from my teacher and from my work that there is always a means by which to become academically successful.
- The experience I gained from my recent years of attending courses such as math, science, ELA and social studies was and will continue to benefit me in the real world. To begin, I've already used my writing skills to communicate with adults with reasons not school related. I've also used these skills to book my own appointments and meetings. These skills are essential for any leader to be responsible of his or herself, and I continue to build on them to improve and refine these skills as for they will be greatly needed down the road. Furthermore, knowing math specifically has proven very critical in life. Although the grade level for math required in the real world is about grade 7, it still has its benefits such as allowing the brain to be able to solve problems and think really beyond the box. These skills are crucial in the real world because in life hurdles keep coming, bigger in fact every time.

I recall moments when I was in eighth grade learning on how to manage finances and use spreadsheets, and I struggled with them at first but what really hit me was how important those skills were in life and how the CBE since kindergarten strengthens these mathematical skills in students to ensure a bright future for the students. That really just showed that what we learn in school is very beneficial and should not be underestimated.

- Another way in which my education in the CBE has impacted me is in my development in the ELA. I learned to write persuasively, speak publicly, and had my first experience related to debate. All of these factors contributed to my success as a debater, and they enabled me to not only discover the enjoyment of this activity, but also to better participate in it using these key skills. The skills that I learned whilst a student of the CBE help me in debate, and also in practical life. In being able to

debate in both English and French, this indicates that in a more quotidian setting, I can communicate easily in both languages. In applying the concepts I learned in Social Studies, as I did in the above example of debate, I am able to apply my knowledge to everyday life in order to have a richer understanding of world events and government decisions. The skills I detailed pertaining to ELA not only help me to debate, but allow me to communicate more clearly. It is in these ways, and in so many others, that what I am learning in school surface during regular activities.

- I have demonstrated academic success in social studies in several positive ways. Being prepared for class has allowed me more time to concentrate on work to make sure I put in my best effort. Striving to receive the satisfaction of knowing that you did well on something has driven me to give 100% on every assignment, task, and quiz. Always wanting to improve my previous mark on a test has also been a huge factor in contributing to my academic growth.

The academic success I have achieved means that I now feel more comfortable wanting to take AP classes in future high school courses. These advanced courses would also open me up to many other amazing opportunities. I have gained more knowledge in certain areas than a student below grade level, because I have taken interest into what I am learning, and pushed myself to be the best that I could be.

Other people I know have demonstrated academic success because they wanted to experience the feeling that you get when you have excelled at something. They felt that otherwise, they were not giving themselves the chance to understand concepts, so they encouraged themselves to do better.

- Fairly recently, I finished a group novel study project that I had been working on for the last couple of months. My group of four read the novel *Speak* by Laurie Halse Anderson and chose to create a video to symbolize the various themes and essential questions that emerged throughout the story. We carefully choose a few scenes we thought were important to emphasize and filmed us acting them out.

I believe this project really furthered my abilities as a student. Every little detail in this video, even the transitions and volume, had to have a reason behind it, something that related back to the book. It forced me to think really critically and deeply about every decision I made because I knew I would have to be able to justify it. For example, in the project, we included a backwards video clip of myself drawing an unrealistic perfect tree with a typical bushy mound of leaves. This was intended to symbolize how the fake front the main character put up slowly unravelled as she endured hardships. In the explanatory presentation we gave to the class, we talked about how sometimes you have to tear down all the layers of fake perfection until you are left with that blank sheet of paper. Only then can you start to redraw your true self. This was one idea we discussed a lot because the concepts we put behind the symbol video clip were so much greater than what you could see.

Overall, this experience has encouraged me to think more profoundly to find connections between large ideas. This isn't only applicable to school assignments either. In daily life, I think it is an important skill to be able to read between the lines and clearly explain your interpretations and thoughts. It's not useful having insightful ideas if you aren't able to express and arrange them. I think this project taught me exactly that. In conclusion, I feel as though I am left as a more critical reader and I would like to believe I am better at breaking down and understanding abstract concepts.



- I have studied French as a second language ever since grade four of my schooling. I was taught the basic elements of the French language and that created a solid foundation that I've built on ever since. I enjoyed my French classes very much in elementary and junior high and I excelled in them. When I got into high school, French 20 was the class I was recommended to take. This was a challenging class for me. I started the course feeling confident in my French ability but as the semester progressed I felt significantly less confident in my ability to comprehend and speak the French language. This was discouraging and caused me to give up. I needed a turning point. This point came in the summer of my grade 10 year. I started looking at universities and one that caught my attention was McGill University, located in Montreal. I really wanted to attend this university but in order for that to happen I had to become fluent in the French language. That would require me to do more than just go to class every day and do my homework; more than the bare minimum. I decided in that moment that instead of giving up on French completely, I would work twice as hard to understand everything I was taught. I signed up to take French 30 in my grade 11 year, although I had originally decided to replace it with another option. After my turning point, I not only decided to take that class but to go further and do my own research to expand my 'French mind'. I found French quotes, movies and even social media pages. I would force myself to listen to the French videos and read the French captions, and then interpret the words I knew, and search up the words I hadn't learned or had forgotten. This helped me a great deal and was very rewarding. If I had chosen to go down a different path and not continued on with learning French, then I would have missed out on a chance to see how much progress I could make in my learning of the French language.



operational expectations monitoring report

Monitoring report for the school year 2016-2017

Report date: June 13, 2017

OE-1: Global Operational Expectations

CHIEF SUPERINTENDENT CERTIFICATION

With respect to Operational Expectations 1: Global Operational Expectations, the Chief Superintendent certifies that the proceeding information is accurate and complete.

- [x] In Compliance.
[] In Compliance with exceptions noted in the evidence.
[] Not in Compliance.

Signed: [Signature] David Stevenson, Chief Superintendent

Date: May 30/17

BOARD OF TRUSTEES ACTION

With respect to Operational Expectations 1: Global Operational Expectations, the Board of Trustees:

- [] Finds the evidence to be compliant
[] Finds the evidence to be compliant with noted exceptions
[] Finds evidence to be not compliant

Summary statement/motion of the Board of Trustees:

Signed: \_\_\_\_\_ Chair, Board of Trustees

Date: \_\_\_\_\_

## OE-1: Global Operational Expectations

### Executive Summary

The Chief Superintendent shall not cause, allow, or fail to take reasonable measures to prevent any practice, activity, decision or organizational condition that is unlawful, unethical, unsafe, disrespectful, imprudent, in violation of Board policy or endangers the organization's public image or credibility.

This Operational Expectation establishes the global values and expectations of the Board of Trustees for the Calgary Board of Education regarding the operation of the organization.

The Chief Superintendent's reasonable interpretation for OE 1: Global Operational Expectations was approved on September 18, 2012. The Board of Trustees last monitored OE 1 on June 14, 2016. This report contains evidence to support the following findings:

- Indicator 1: Compliant
- Indicator 2: Compliant
- Indicator 3: Compliant

## OE-1: Global Operational Expectations

|  |                  |
|--|------------------|
| <p>The Chief Superintendent shall not cause, allow, or fail to take reasonable measures to prevent any practice, activity, decision or organizational condition that is unlawful, unethical, unsafe, disrespectful, imprudent, in violation of Board policy or endangers the organization's public image or credibility.</p> | <p>Compliant</p> |
|--|------------------|

### Board-approved Interpretation |

The Chief Superintendent interprets that the Board of Trustees values an organization characterized and distinguished as:

- operating in accordance with the *School Act* and the related regulations, as well as other applicable legislation and regulations;
- operating using standards associated with sound professional and business practice;
- maintaining working and learning environments that endeavour to keep employees and students from harm;
- supporting a respectful work environment for employees, a respectful school environment for students and considerate, thoughtful interactions with the public;
- implementing well-informed and purposeful direction-setting and decision-making models;
- meeting the expectations set out in the Board of Trustees' Operational Expectations policies; and
- administering its operations in ways that meet or exceed the community's expectations for the conduct of a public institution.

Specifically, the Chief Superintendent interprets:

- *reasonable measures* to mean system-wide preventative internal controls.

## OE-1: Global Operational Expectations

Chief Superintendent's Administrative Regulations lay a foundation for internal controls. Administrative Regulations are principle-driven and apply across the organization. They are built upon and align with the Alberta *School Act* and the policies of the Board of Trustees.

In relation to global operations, Administrative Regulation 4027 – Code of Conduct for Employees (Attachment I) defines standards of practice that meet the values of the Board of Trustees.

Administrative Regulation 4027 provides a foundation and guidance for employee conduct. The Three-Year Education Plan (Attachment II) provides the direction. The Chief Superintendent considers the four pillars of the Plan to support the stated values of the Board of Trustees.

- *practice, activity, decision or organizational condition* to mean the day-to-day operations of the Calgary Board of Education.

In a large, decentralized organization like the CBE, implementation of and adherence to internal controls is the responsibility of each employee. Administrative Regulations define standards of practice that meet the expectations of the Board of Trustees and the organization. The Chief Superintendent understands that the method used to determine whether the organization is compliant with the expectations of the Board is monitoring of Operational Expectations policies.

### Board-approved Indicators and *Evidence of Compliance* |

1. 100 per cent of employees are informed of the expectations for their conduct in the context of their employment with the CBE:
  - a) at the point of hire, as evidenced by new employee acknowledgement;

*All employees newly hired or re-hired to the CBE in the 2015-2016 school year completed a form indicating their acknowledgement and awareness of the employee code of conduct. This is confirmed by a review of the new hire checklist maintained in the Human Resources service unit.*

- b) annually by school principals;

*100 per cent of school principals responded Yes to the following statement:*

*"all employees in my school were informed of the expectations for their conduct in the context of their employment at my school."*

## OE-1: Global Operational Expectations

- c) annually by supervisors.

*100 per cent of service unit managers responded Yes to the following statement:*

*“all employees in this service unit were informed of the expectations for their conduct in the context of their employment in the Calgary Board of Education.”*

*100 per cent of area directors responded Yes to the following statement:*

*“all of my direct reports were informed of the expectations for their conduct in the context of their employment in the Calgary Board of Education.”*

*The organization is compliant with this indicator.*

- 2. Each service unit will develop and implement a work plan directly linked to the system direction set by the Three-Year Education Plan, as measured by the Chief Superintendent’s accountability process.
  - a) *100 per cent of service units developed a work plan for the 2015-2016 school year, identifying specific work connected to and in alignment with the Three-Year Education Plan. These work plans informed the system strategic implementation plan coordinated and led by Superintendents’ Team.*

*The organization is compliant with this indicator.*

- 3. 100 percent of monitoring reports for Operational Expectations 2 to 12 will be found by the Board of Trustees to be:
  - a) in compliance, or
  - b) in compliance with exceptions to individual subsections, all of which will have a plan to address, as measured by decisions of the Board of Trustees.

*11 Operational Expectations monitoring reports have been presented to the Board of Trustees in 2016-2017 meetings and all were found to be in overall compliance by the Board. No reports were found to be in non-compliance. Of these 11 reports, one report had two exceptions and one report had four exceptions noted. Exceptions were noted by administration*

**OE-1: Global Operational Expectations**

*and a plan to address these exceptions was included in the capacity building section attached to the monitoring reports.*

*The organization is compliant with this indicator.*

Evidence demonstrates the indicators in sub section 1 are in compliance.

ATTACHMENT I: Administrative Regulation 4027 – Code of Conduct for Employees

ATTACHMENT II: Three-Year Education Plan 2016-2019

GLOSSARY – Developed by the Board of Trustees

Board: The Board of Trustees

Operational Expectations: These policies define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.

Monitoring Report: The Board wants to know that its values have driven organizational performance. The Chief Superintendent will present to the Board, for its evaluation, a report that summarized how either compliance has been achieved on Operational Expectations or how reasonable progress has been made in Results. Each monitoring report requires: a re-statement of the full policy, by section; a reasonable interpretation of each section; data sufficient to prove compliance or reasonable progress; and a signed certification from the Chief Superintendent of the status.

Reasonable Interpretation: Once the Board has stated its values in policy, the Chief Superintendent is required to "interpret" policy values, saying back to the Board, "here is what the Board's value means to me." The Board then judges whether this interpretation is reasonable. In other words, does the Chief Superintendent "get it?" This reasonable interpretation is the first step required in monitoring compliance on Operational Expectations and monitoring reasonable progress on Results.

Compliance: Evidence or data that allow the Board to judge whether the Chief Superintendent has met the standard set in the Operational Expectations values.

Non-compliance: In gathering evidence and data to prove to the Board that its Operational Expectations values have been adhered to, there may be areas where the standards were not met. The policy or subsection of the policy would be found to be "non-compliant." The Chief Superintendent would identify the capacity-building needed to come into compliance and the Board would schedule this section of policy for re-monitoring.

## Employee Code of Conduct

### administrative regulation

Administrative  
Regulation No.  
4027

Classification:  
Staff

Effective Date:  
June 24, 2015.

#### 1 | Purpose

The purpose of this Administrative Regulation is:

- To provide guidelines for the conduct of CBE employees.

#### 2 | Scope

This Administrative Regulation applies to:

- All CBE employees

#### 3 | Compliance

All employees are responsible for knowing, understanding and complying with this Administrative Regulation.

Failure to comply could result in disciplinary action up to and including termination of employment.

#### 4 | Principles

The following principles apply

- CBE maintains high standards for the conduct of its employees.
- Employees are expected to exercise common sense, good judgement and discretion.
- Employees are expected to conduct themselves honestly and with integrity.
- CBE Working Relationship Commitment guides our work together.
- Employee conduct should reflect CBE values.

#### 5 | Definitions.

**Bullying:** means aggressive and repeated behavior by an individual where the behavior is intended to cause harm, fear or distress to another individual including physical, emotional, or social harm, harm to the individual's reputation or harm to the individual's property, or to create a negative environment for another individual. Bullying behavior includes the use of any physical, verbal, electronic, written or other means.

**CBE:** means The Calgary Board of Education.

**Conflict of Interest:** means situations in which the personal or private interests of an employee (or the employee's family or close business associates) conflict with the interests of the CBE, or when there is a reasonable basis for the perception of such conflict.

**Discrimination:** means any type of behavior that includes practices or actions, intentional or otherwise that is exclusionary, denies access or differentiates adversely and is based on such aspects as: race, religious beliefs, colour, gender, sexual orientation, physical/mental disability, ancestry, place of origin, marital status, family status, source of income or age.

**Harassment:** means any behavior or pattern of repeated behavior that disparages, humiliates or harms another person, or denies an individual's dignity and respect and is demeaning or humiliating to another person.

**Sexual Harassment:** means any unwelcome sexual behavior that adversely affects, or threatens to affect, directly or indirectly, a person's job security, working conditions or prospects for promotions.

## 6 | Regulation Statement

### General

- 1) Employees shall:
  - a) treat students, parents, community members and other CBE employees with dignity, respect and consideration;
  - b) adhere to their respective collective agreements or terms and conditions of employment;
  - c) report to work fit to conduct their duties;
  - d) adhere to the policies, practices, and regulations of CBE; and
  - e) conduct their employment responsibilities in a respectful, honest and diligent manner.
- 2) Employees shall not:
  - a) engage in discriminatory behavior;
  - b) engage in behavior that constitutes harassment or sexual harassment;
  - c) engage in bullying behavior;
  - d) engage in activities that are deemed to be in a conflict of interest;
  - e) engage in behavior that may compromise CBE's image or reputation including activities that may disparage, defame, or embarrass the organization;
  - f) expose or subject any student to sexual contact, activity, behavior or sexually explicit material;

**Conflict of Interest**

- g) engage in a relationship with a staff member, parent or community member that disrupts the school community or workplace;
  - h) be under the influence of, or provide others with alcohol or illegal drugs while on work premises or performing work related duties;
  - i) engage in retaliatory behavior against anyone who uses the policies and procedures of CBE.
- 3) Employees of the CBE shall be deemed to be in conflict of interest if they:
- a) are party to a subsisting contract with the CBE other than a contract of employment under which money of the CBE is payable or may become payable;
  - b) have a shareholding interest in any private corporation (other than a corporation whose shares are publicly traded) which has a subsisting contract with the CBE under which money of the CBE is payable or may become payable;
  - c) use information gained through their positions as employees of the CBE to gain benefit either directly or indirectly;
  - d) are in a familial, cohabitation or intimate relationship at the same time there is a direct supervisory relationship;
  - e) disclose information gained through their positions as employees of the CBE for the benefit of themselves or others;
  - f) are party to a contract with the CBE for the lease or purchase of real estate property or holdings: or
  - g) engage in private endeavours, outside of official CBE duties, that provide the appearance of an opportunity for wrongdoing or unethical conduct, which include, but are not limited to;
    - i. paid or unpaid activities beyond official duty,
    - ii. activities associated with a financial interest,
    - iii. relationships with third parties who may be associated with the CBE through employment or business.
- 4) Employees shall not;
- a) use information or materials belonging to the CBE to gain financial benefit either directly or indirectly;
  - b) enter into a contract with the CBE , either personally or through

- a third party; or
- c) use their employment to gain personal advantage beyond the benefits provided by their employment contract.
- Criminal conduct**
- 5) Employees must immediately notify the Superintendent of Human Resources if they are charged with a criminal offence.
- 6) Employees charged with an offence under the Criminal Code of Canada may be suspended from their employment.
- 7) An individual's employment with CBE may be terminated as a result of a criminal conviction.
- Gifts and payment**
- 8) CBE employees shall not accept or provide a gift, payment, favour or service from or to any individual or organization in the course of performance of their assigned duties if that gift, payment, favour or service:
- a) is other than a normal exchange of hospitality between people doing business; or
- b) affects the fair and unbiased reception or the evaluation of the materials or services offered for use by the CBE; or
- c) may create the appearance of undue influence.
- Use of CBE Property**
- 9) Principals or managers may authorize the use of CBE equipment by a CBE employee off CBE premises provided the required documentation is completed, tracked and retained by the direct supervisor.
- 10) CBE property, including vehicles, equipment and material shall not be used for personal benefit, gain or non-CBE use without supervisor approval and documentation.
- 11) Employees are responsible for exercising all reasonable care to prevent abuse to, excessive wear, loss or damage to CBE-owned equipment or material entrusted to their care.
- Outside Employment**
- 12) Employees may take supplementary employment, including self-employment, unless such employment:
- a) constitutes a conflict of interest under section 3 of this regulation;
- b) is performed in such a way as to appear to be an official act or to represent an opinion of the CBE; or
- c) interferes with, influences or affects the performance of duties for the CBE.

## 7 | History

|                       |   |
|-----------------------|---|
| Approval              | June 27, 1978                                   |
| Next Review           | June 2019                                       |
| Revision/Review Dates | June 14, 1994<br>February 15, 2003<br>June 2015 |

## 8 | Related Information

- AR 4038 Harassment and Discrimination
- AR 4080 Workplace Violence

## Calgary Board of Education Three-Year Education Plan 2016-19

**Our Mission:** Each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

**Our Values:** Students come first. Learning is our central purpose. Public education serves the common good.

### Our Outcome: Student Success

#### Personalize Learning

Success for each student, every day, no exceptions

Instructional design and leadership focus on:

- student agency and intellectual engagement
- active and effortful tasks designed for student interests and learning needs
- assessment that informs teaching and learning
- students knowing what they know, how they know it, how they show it, and what they need next

#### Build Professional Capital

Capacity building with a focus on results

Collaborative learning networks focus on:

- professional and intellectual engagement
- shared standards of practice
- evidence-informed, research-informed and job-embedded professional learning
- staff knowing the decisions they have made, why they made them, what impact those decisions had, and what is required next

#### Engage our Stakeholders

Everyone contributes to the success of public education

Internal and external community members:

- actively recognize public education as foundational to a democratic society
- acknowledge and accept different roles, responsibilities and contributions based on shared outcomes and engagement
- support, practice and benefit from open and responsive communication
- accept responsibility for the success of the organization

#### Steward our Resources

Resource management on behalf of student learning

Decisions and actions at all levels of the organization are:

- based on values and priorities
- consistent with the learning agenda
- evidence-informed
- made within a coherent framework
- strategic & responsive
- sustainable

### Alberta Education Outcomes

- Students are successful
- The achievement gap is eliminated for FNMI students
- The education system is inclusive
- Excellent teachers and leaders
- The education system is well governed and managed

## report to Board of Trustees

### Students come first | Budget Report for 2017-18 and beyond

|                             |   |
|-----------------------------|---|
| Date                        | June 13, 2017   |
| Meeting Type                | Regular Meeting, Public Agenda  |
| To                          | Board of Trustees   |
| From                        | David Stevenson, Chief Superintendent of Schools  |
| Purpose                     | Decision and Information  |
| Originator                  | Brad Grundy , Superintendent, Chief Financial Officer, Corporate Treasurer  |
| Governance Policy Reference | Operational Expectations<br>OE-5: Financial Planning<br>OE-6: Financial Condition<br>OE-7: Asset Protection<br>OE-8: Communication With and Support for the Board |
| Resource Persons            | Superintendents' Team<br>Ed Sutlic, Director, Corporate Finance<br>Donna Rogers, Manager, Corporate Planning & Reporting<br>Finance / Technology Services Staff   |

#### 1 | Recommendation

---

It is recommended:

THAT the Board of Trustees approves the 2017-18 budget as reflected in Attachment I and authorizes its submission to Alberta Education.

## 2 | Issue

---

Section 147(2) of the *School Act* requires that the Calgary Board of Education submit to Alberta Education, by May 31 of each year, a budget approved by the Board of Trustees for the fiscal year beginning on the following September 1. The deadline was extended to June 30 for this year only.

In accordance with the Board of Trustees' Operational Expectation OE-5: Financial Planning, the Chief Superintendent shall develop and maintain a multi-year financial plan that is related directly to the Board's Results priorities and Operational Expectations goals, and that avoids long-term fiscal jeopardy to the organization.

This budget document has been prepared to satisfy the requirements of the above expectation.

## 3 | Background

---

In accordance with the *School Act* and the intent of Operational Expectation OE 5: Financial Planning, the Chief Superintendent is required to prepare and submit to the Board of Trustees, for review and approval, a budget which is balanced, so that the proposed expenses do not exceed the projected revenues to be received by the Calgary Board of Education or from other identified funding sources such as reserves or unrestricted net assets.

In order to develop the 2017-18 Budget, superintendents were tasked to formulate and lead all budget work including:

- providing full executive oversight of the budget process;
- considering the delivery of learning supports and services;
- providing succinct and direct stakeholder engagement; and
- making final recommendations to the Board of Trustees concerning all aspects of the 2017-18 Budget.

The 2017-18 Budget is based upon assumptions provided to the Board of Trustees for information on April 11, 2017. The budget development is guided by the CBE's values:

- Students come first
- Learning is our central purpose
- Public education serves the common good

The budget is also developed with direction from Alberta Education and the CBE's Three Year Education Plan.

## 4 | Analysis

---

The key highlights of the 2017-18 Budget, detailed in Attachment I are:

- Funds allocated directly to schools via the Resource Allocation Method (RAM) have increased by \$12.5 million to fund enrolment growth of 1.7 per cent and the opening of four new schools.
- Instructional supplies or materials and transportation fees have been reduced or eliminated under Bill 1: An Act to Reduce School Fees which will make life more affordable for Albertans. A government grant of approximately \$18.3 million will be received in lieu of fees charged.
- This budget reflects best estimates and the assumption that transportation expenses will be fully funded by targeted government grants and fees for students who do not qualify for fee-free or fee-reduced transportation service. No dollars will be contributed from the global budget to support transportation. The portion of the fee replacement grant applied to transportation is approximately \$7.9 million in lieu of fees charged.
- The number of school-based teachers will increase by 92 full time equivalent positions and support staff by 26 full time equivalent positions.
- School budgets have been reduced by 1.4 per cent (on a status-quo basis) and of the operating budget amount that would have been required to maintain operations at a level similar to 2016-17. Service units by 3.7 per cent (on an absolute basis).
- Non-facility capital project spending is budgeted at \$22.9 million, including \$2.6 million to support the commissioning of new schools scheduled to open in the 2018-19 year, \$2.2 million for wireless upgrades to address functionality issues, \$5.6 million for technology replacement and refresh and \$7.0 million for the development and implementation of the new Student Information System (SIS).
- As required by law, the budget for 2017-18 is balanced.

Further details are provided in Attachment I to this report.

## 5 | Financial Impact

---

### Overall Balanced Position

The CBE will achieve a balanced position for this operating budget for 2016-17 after taking into account:

- projected revenues of \$1,364.5 million and operating expenditures of \$1,379.5 million for an operating deficit of \$15.0 million;
- planned capital spending of \$22.9 million;
- planned use of \$9.8 million in operating and capital reserves.

## 6 | Implementation Consequences

---

The attached budget report fulfills the requirement to provide a budget in summary format that is understandable to the Board and allows the Board to understand the relationship between the budget and the Results priorities and any Operational Expectations goals for the year as well as the other requirements under OE-5.

## 7 | Conclusion

---

This report is being presented to the Board of Trustees for approval and satisfies the requirements of OE-5.



DAVID STEVENSON  
CHIEF SUPERINTENDENT OF SCHOOLS

### ATTACHMENTS

Attachment I: Working Together for Student Success Budget Report for 2017-18

### GLOSSARY – Developed by the Board of Trustees

Board: Board of Trustees

Governance Culture: The Board defined its own work and how it will be carried out. These policies clearly state the expectations the Board has for individual and collective behaviour.

Board/Chief Superintendent Relationship: The Board defined in policy how authority is delegated to its only point of connection – the Chief Superintendent – and how the Chief Superintendent's performance will be evaluated.

Operational Expectations: These policies define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.

Results: These are our statements of outcomes for each student in our district. The Results policies become the Chief Superintendent's and the organization's performance targets and form the basis for judging organization and Chief Superintendent performance.

# Working Together for Student Success

## Budget Report for 2017-18



learning | **as unique** | as every student



**Calgary Board  
of Education**



ASSOCIATION OF  
SCHOOL BUSINESS OFFICIALS  
INTERNATIONAL

This Meritorious Budget Award is presented to

**CALGARY  
BOARD OF EDUCATION**

excellence in the preparation and issuance of its budget  
for the Fiscal Year 2016-2017.

The budget adheres to the principles and standards  
of ASBO International's Meritorious Budget Award criteria.



*Brenda Burkett*

Brenda R. Burkett, CPA, CSBA, SFO  
President

*John D. Musso*

John D. Musso, CAE, RSBA  
Executive Director

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## I. Introductory – Executive Summary

### Organizational summary

#### Goals and objectives

The Calgary Board of Education (CBE) is the public school board in Calgary, Alberta, Canada. We believe every one of our students is unique and personalized learning is the key to their success. From Early Childhood Services (ECS) - Grade 12 as well as continuing adult education the CBE operates a variety of programs and services to support each and every student. The CBE is one of the best public education systems in the world. Outstanding education depends on making wise decisions about how to invest public resources on behalf of over 121,200 students. It's an important responsibility. The money we spend educating our youth is one of the most important investments we can make in our society's future.

#### Purpose

The CBE's entire system works to support student learning. The 2017-18 budget was prepared, first and foremost, with the objective of honoring our mission and most importantly, our values. The 2017-18 budget puts students first, focuses on learning as our central purpose, and recognizes that public education serves the common good.

#### Mission

The Board of Trustees sets as its Mission that **“each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.”**

We therefore know that we must consider each individual student and his or her learning requirements while balancing all student needs against the resources available across the organization.

#### Values

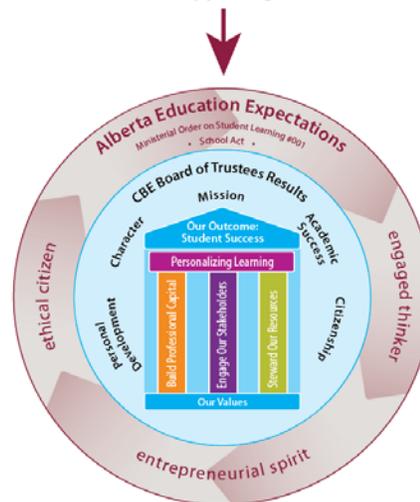
Administration's approach to the budget is guided by our values:

- Students come first
- Learning is our central purpose
- Public education serves the common good

We continue working to optimize student learning while recognizing the reality of our fiscal constraints.

| CBE 2017-18 Budget |                     |
|--------------------|---------------------|
| Schools:           | 247                 |
| Students:          | 121,200 (estimated) |
| Staff:             | 14,000+             |

Supporting



## **Governance**

The CBE is guided by a publically elected board of seven trustees. Trustees are elected every four years in alignment with municipal elections for Calgary's mayor and councillors. The Board of Trustees provides direction to the Chief Superintendent of Schools (Chief Superintendent) via its policies and procedures as evidenced by board motions. To pass a motion requires the support of a majority of the seven trustees. In the event of a tie vote, the related motion fails.

### **Board of Trustees**

*(publicly elected to four- year terms, next election scheduled for Oct. 16, 2017.)*

|                            |               |
|----------------------------|---------------|
| Joy Bowen-Eyre (Chair)     | Wards 1 & 2   |
| Trina Hurdman (Vice-Chair) | Wards 6 & 7   |
| Lynn Ferguson              | Wards 3 & 4   |
| Pamela King                | Wards 5 & 10  |
| Judy Hehr                  | Wards 8 & 9   |
| Julie Hrdlicka             | Wards 11 & 13 |
| Amber Stewart              | Wards 12 & 14 |

The Board of Trustees is responsible for the appointment of the Chief Superintendent of Schools. Under the Board's governance framework, operations are delegated to the Chief Superintendent. The Chief Superintendent then hires a team of superintendents, staff and other supports to lead and manage operations.

### **Superintendents' Team & date appointed to role**

|                       |   |               |
|-----------------------|---|---------------|
| David Stevenson       | Chief Superintendent  | June 1, 2014  |
| Susan Church          | Deputy Chief Superintendent   | Sept. 1, 2014 |
| Brad Grundy           | Superintendent, Finance/Technology Services, Chief Financial Officer, Corporate Treasurer | Nov. 1, 2013  |
| Dany Breton           | Superintendent, Facilities & Environmental Services                                       | Oct. 26, 2015 |
| Greg Francis          | Superintendent, Human Resources & General Counsel   | Dec. 17, 2012 |
| Jeannie Everett       | Superintendent, Learning  | May 18, 2015  |
| Marla Martin-Esposito | Chief Communications Officer  | Oct. 26, 2015 |

## Contributions to the budget process

### Community engagement

[Community engagement](#) provides perspectives that help us make the best decisions on behalf of our students. In developing the budget we recognize that public education is a shared responsibility. With input from our students, families, employees, communities and the Government of Alberta, we make decisions in the best interest of all students and their learning. Those decisions inform our budget process.

### Alberta Education

The CBE receives over 93 per cent of its funding from Alberta Education. Alberta Education is the Ministry of Education for the Government of Alberta which supports students, parents, teachers and administrators from ECS (pre-kindergarten and kindergarten) - Grade 12. The Ministry has the following responsibilities:

- develops curriculum and sets standards
- evaluates curriculum and assesses outcomes
- teacher development and certification
- supports special needs students
- funds and supports school boards
- Aboriginal and francophone education
- oversees basic education policy and regulations

Aspects that affect the provincial budget, thereby affecting the CBE, include:

- Changing resource prices make it difficult to predict the Province's total revenue. The Government of Alberta is cautious when it comes to revenue forecasting.
- Alberta is Canada's fastest growing province in terms of population. It is estimated to rise to 4.3 million in 2017, as it has been seen that every year the population increases by approximately 76,000. This creates a need for more infrastructure such as schools, health facilities and roads.
- Public priorities may change every year; research and feedback from Albertans help identify these shifting priorities.

The [Alberta Budget 2017: Working to Make Life Better](#) includes money that comes in (revenue) and money that goes out (expenses). Alberta's annual budget typically covers a year from April through to the following March. The Government gets money from personal and corporate taxes, resource revenue like oil and natural gas royalties, transfers from the federal Government, income from investments and revenue from other taxes and fees on specific products and services and from borrowing. Expenses include all of the programs and services the Government provides for Albertans, from funding to support people with disabilities to running hospitals. It also includes staffing costs for people to provide these services. Each budget year presents a different challenge for the Government, depending on many outside factors.

## Implications of Alberta Budget 2017

The Alberta Budget 2017 was delivered March 16, 2017. One of the overall themes was making life more affordable for families. For school boards this meant funding was provided for enrolment growth. For families this meant funding was provided to reduce certain school fees in the ECS - Grade 12 education system.

Our budget, built on the information and funding provided by Alberta Education, sets out how we will deploy and invest our financial resources to meet the needs of students in order to achieve the [Results](#) established by the Board of Trustees.

We are also guided by CBE's [Three-Year Education Plan](#). This is updated each year as required by Alberta Education's formal structure to support accountability and transparency throughout the Provincial ECS (pre-kindergarten and kindergarten) – Grade 12 education system and to ensure alignment of school authorities and schools with Provincial direction.

The CBE's Three-Year Education Plan focuses on personalized learning, building our professional capital, engaging our stakeholders and stewarding our resources. Taken together, we believe these actions allow us to optimize student success.

By sharing a common goal of student success, each one of us contributes to making it happen.

## Guiding Documents

- [Alberta Education Business Plan 2017-20](#) – Alberta Education's business plan provides an overview of the outcomes for the ministry and the key strategies to be completed to achieve those outcomes.
- [CBE Three-Year Education Plan](#) – The plan that guides our work and connects each CBE employee to our Mission, our Values and our Outcome: Student Success. We focus on four strategies: personalize learning; build our professional capital; engage our stakeholders; and steward our resources.
- [CBE Governance Policies](#) – Policies enable the Board of Trustees to effectively lead, direct, inspire and control the outcomes and operations of the district. The Board of Trustees governance policies are grouped into four categories, each serving a distinct purpose. The four categories are:
  - Governance Culture: these policies define the Board of Trustees' own work and how it will be carried out. They clearly state the expectations the Board has for individual and collective behavior.
  - Board/Chief Superintendent Relationship: the Board has defined in policy how authority is delegated to the Chief Superintendent and how the Chief Superintendent's performance will be evaluated.
  - Operational Expectations: these policies (known as OEs) define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.
  - Results: these are the Board of Trustees' statements of outcomes for each student in our district. The Results policies become the Chief Superintendent's and the organization's performance targets and form the basis for judging organization and Chief Superintendent performance.

- [CBE Results](#) – The Board of Trustees has set clear direction for student success. We are all committed to achieving these Results:
  - Academic success – Each student will be literate and numerate, able to integrate and apply the knowledge, skills, attitudes and competencies acquired across all academic disciplines.
  - Citizenship – Each student will be a responsible citizen.
  - Personal development – Each student will identify and actively develop individual gifts, talents and interests.
  - Character – Each student will demonstrate good character.
  
- [Alberta Budget 2017: Working to Make Life Better](#) – The Alberta Government’s fiscal plan for 2017 including new legislation on school fees and transportation services ([Bill 1: An Act to Reduce School Fees](#)). The plan reduces school fees for parents with children in the ECS - Grade 12 education system, including fees for instructional supplies or materials (ISM) and transportation. The Alberta Government made \$54 million available province-wide to support the implementation of Bill 1. Alberta Budget 2017 will provide Albertans with \$8.2 billion in funding for the ECS - Grade 12 education system including \$500 million for new schools, replacements and modernizations and \$213 million to fund enrolment growth and grants for First Nations students, English Language Learners and others with diverse learning needs. There will also be funding to offset the loss of school fee revenue to ensure school boards maintain education programming for students.

This Provincial direction, translated through our values, help us support success for each student every day.

## Budget process and timeline

### Process

The preparation of the annual budget is led by Superintendents' Team. Budget decisions are evaluated through decision criteria established by Superintendents' Team to ensure that the resulting budget is aligned with our values and in support of the Three-Year Education Plan. The Board of Trustees may provide direction (via Board motion) to the Chief Superintendent of Schools. Approval of the final budget rests with the Board of Trustees who must submit a budget to the Ministry of Education by May 31, 2017. For the 2017-18 budget, this date has been extended by the Minister of Education to June 30, 2017.

The resulting budget must adhere to Provincial Government reporting requirements, legislation and be based on government funding as calculated in the annual [Funding Manual](#). The budget will reflect amounts provided for spending in schools. Principals make school-based resource deployment decisions and determine the best use of the dollars allocated to their particular school and student population.

### Timeline

In a typical year the Provincial budget is released in late February or early March. This timing allows us the time required to prepare and deliver the Budget Assumptions Report ('BAR', included later in this report) to the Board of Trustees, provide schools with their budgets by early April to accommodate the spring staffing process and deliver the final budget to the Board of Trustees for approval by the May 31 deadline.

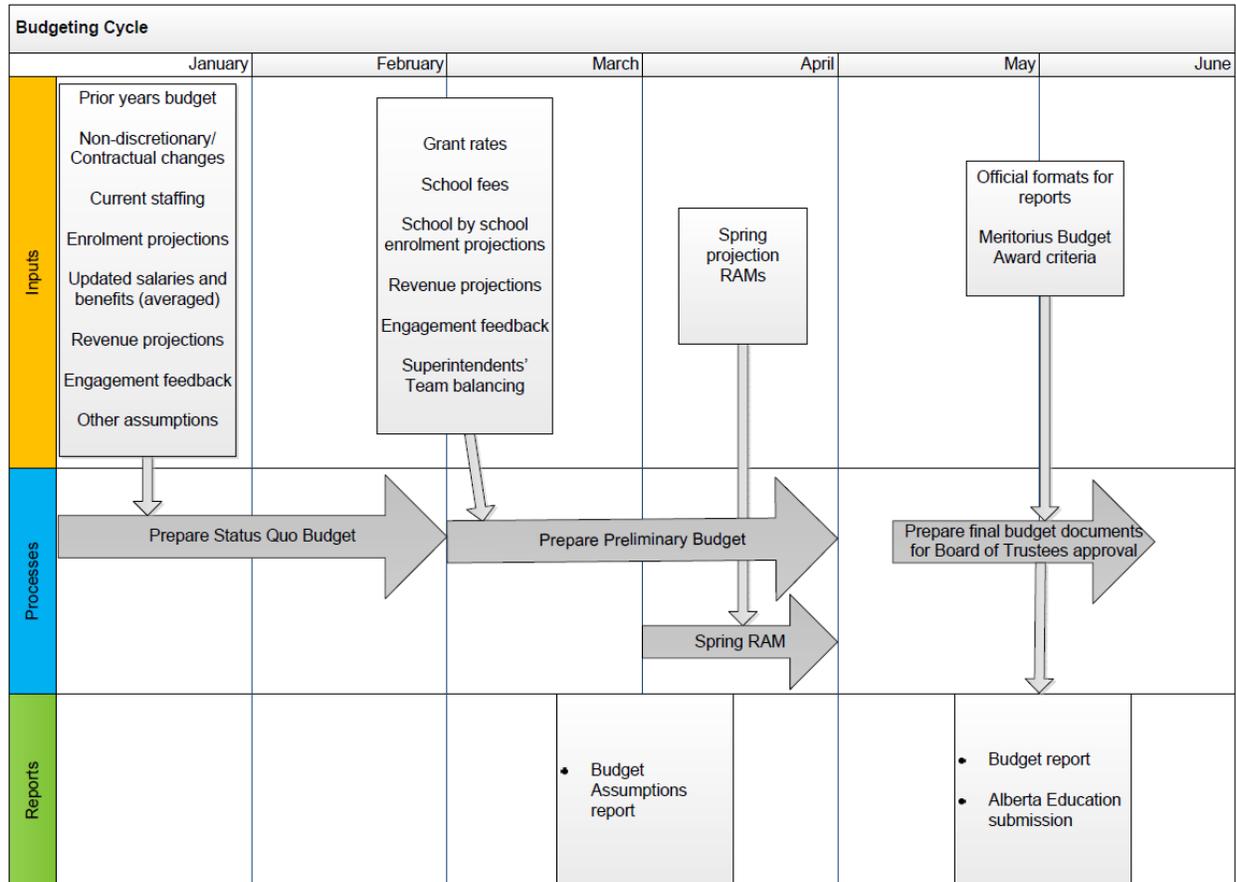
The Provincial Government released its 2017 budget in March and our 2017-18 school budget allocations were sent to principals in April using the Resource Allocation Method (RAM). The RAM is the mechanism used by the CBE to determine and allocate resources to each school. The RAM considers the nature of the school program, the number of students, the complexity of students enrolled at the school and a range of other factors. The RAM book can be found [here](#).

The Budget Assumptions Report (BAR) was presented to the Board for information purposes on April 11, 2017 and there were no board motions arising from the presentation of this report. The BAR discloses the budget planning assumptions as required under the Board of Trustees' Operational Expectation (OE) 5: Financial Planning. Operational Expectation 5: Financial Planning sets out the Board of Trustees' expectations related to the CBE's financial planning and reporting. The presentation of the Budget Assumptions Report provides the necessary information required by the Board of Trustees in support of the budget preparation process.

Once the BAR is received by the Board of Trustees, Superintendents' Team prepares the detailed budget plan for presentation to the Board of Trustees for approval. The report was prepared and is planned for presentation to the Board of Trustees on June 13, 2017 for review and for approval on June 20, 2017.

**Timeline (cont'd)**

The following are highlights of the budget schedule.



## Bill 1

The CBE supports the introduction of the Provincial Government's [Bill 1: An Act to Reduce School Fees](#) that was introduced in March 2017. Through the proclamation of Bill 1, the Government is making life more affordable for Alberta families. They are reducing fees for specific instructional supplies or materials, as well as transportation fees for students who live 2.4 kilometres or more away from their designated school. This is the first step in reducing the burden of school fees on Alberta's families. The Government will continue to engage education stakeholders, including school boards and parents, in achieving additional reductions in future years. The Bill 1 regulatory framework is planned for release in June of this year. As a result, this budget has been prepared based on assumptions related to the Bill 1 regulatory framework. The details provided in the framework will inform the CBE's policy on fees.

Conversations are ongoing between CBE administration and Alberta Education staff regarding the specific details of this Bill. The impending School Fee Regulation is expected to be in force in June 2017. Assumptions and estimates have been made in order to complete the budget by the (extended) legislated budget delivery date of June 30. There is a probability that actual activities will vary from the estimates made in this budget with regards to fees and transportation costs. The 2017 Fall Update Budget will incorporate any adjustments resulting from the Bill 1 framework. Finally, under Bill 1 fees established by the CBE for the 2017-18 school year will require ministerial review and approval prior to implementation.

## Stakeholder Engagement

The CBE is committed to involving our stakeholders in the decisions that affect them.

We continue to improve our budget-related communication with our stakeholders. [Our website](#) includes a great deal of budget information including reports, staff communications, and speaking notes. Chief Financial Officer Brad Grundy continues to respond to comments via "Dollars and Sense with CFO Brad Grundy," where issues such as classroom funding and staffing are addressed head-on.

Comments are accepted year-round through our [budget feedback form](#). It allows our staff and the public to submit their input on educational spending. This year the budget comments typically related to alternative programs, Bill 1, class size, school fees, staffing, maintenance, student supports, teacher workload, technology, transportation services or other. The CBE finance team reads each comment received and considers the input when making decisions regarding future budgets.

For the 2017-18 budget, the CBE requested input from parents, staff and other stakeholders. We obtained feedback in various venues and formats:

- meetings with union representatives [Alberta Teachers Association (ATA), Staff Association, Canadian Union of Public Employees (CUPE), Skilled Trades Union]
- meeting with the Council of School Councils (COSC)
- online comments

In February/March 2016 we embarked on a larger budget engagement and continue to combine this feedback with that received in 2017. Our public still places a priority on maximizing resources in classrooms. We continue to honour this in 2017-18 by maintaining one of the lowest Board and System Administration expenditures (approximately 2.7 percent of total expenditures) in Alberta, enabling our funding to be dedicated to student learning.

## Meritorious Budget Award

The CBE received the Meritorious Budget Award (MBA) for excellence in the preparation and issuance of its 2016-17 budget. The CBE submitted its 2016-17 budget report for MBA consideration as an additional way to demonstrate its commitment to open, transparent and fair communication to the public. As a publically accountable organization the CBE is committed to a fully informed and engaged public.

The MBA promotes and recognizes excellence in school budget presentation and enhances school business officials' skills in developing, analyzing, and presenting a school system budget. After a rigorous review by professional auditors, the award is conferred only to school districts that have met or exceeded the program's stringent criteria. [The CBE is one of a few school districts in Canada to achieve the MBA.](#)

The MBA was awarded from the Association of School Business Officials International (ASBO), a professional organization that provides programs and services to promote the highest standards of school business management practices, professional growth, and the effective use of education resources.

This budget report incorporates a number of the suggestions and recommendations that were provided by the MBA adjudication process related to the 2016-17 budget report.

The 2017-18 Budget report will be submitted for MBA evaluation following Board of Trustee approval.

## Allocation of resources to achieve student success

### Priorities

We continue to optimize student success by improving the quality of teaching and learning in the classroom by focusing on several notable priorities:

- Personalizing learning
- Advancing leadership practices
- Implementing kindergarten – Grade 12 mathematics and literacy strategies
- Implementing the High School Success strategy
- Improving results for First Nations, Métis and Inuit students

We will create conditions for success and have a positive impact on the learning outcomes of students by:

- Building, maintaining and modernizing schools to foster enriching learning environments for all students. (Four schools opening in 2017-18 and three under development for a total capital cost of \$210 million. The Government has announced an additional three new schools and one major modernization scheduled for completion in 2021).
- Enhancing and implementing a replacement Student Information System that provides greater access to and use of student profile data for students, families, teachers and leaders, supports best practices in assessment and grading and creates administrative efficiencies (total estimated capital cost of \$17.7 million).
- Continuing to use our community engagement framework ([dialogue](#) framework) to guide decision making and to ensure stakeholders are reasonably included in decisions that affect them (annual cost of \$1.1 million including staff costs).
- Undertaking a comprehensive system-wide staff engagement survey to allow us to continue to provide an engaging work environment for our staff (estimated cost of \$0.5 million).

## **Budget attributed to activities**

Students are at the centre of everything we do at the CBE; our budget reflects that commitment. The funding provided to the CBE and the allocation of resources within the CBE supports the organization's achievement of the results and expectations established by the Board.

Our work is guided by our [Three-Year Education Plan](#), which connects each CBE employee to student success. We focus on creating an environment “to inspire all students to achieve success and fulfillment and reach their full potential by developing the competencies of Engaged Thinkers and Ethical Citizens with an Entrepreneurial Spirit” (Ministerial Order on Student Learning, 2013).

### **Instruction**

In the 2017-18 school year, \$1.1 billion dollars [including 8,732 Full Time Equivalents (FTEs)] will be spent on instruction in direct support of the achievement of success for each student. This includes spending in schools and Areas as well as supports that are centrally managed, such as, but not limited to: psychologists, braille assistants, deaf and hard of hearing specialists, mental health specialists, occupational and physical therapists, speech language pathologists, multicultural services, school-based technology support, student records and more. Public education requires an integrated network of professionals working in collaboration to support students in their learning.

Resources have been applied to support the personalized learning strategy of the [Three-Year Education Plan](#), notably personalizing learning, advancing leadership practices, implementing a kindergarten - Grade 12 literacy and math strategy and improving results for First Nations, Métis and Inuit students.

### **Plant, Operations and Maintenance**

Costs under the Plant, Operations and Maintenance block are essential for the safe operation of our facilities and to provide quality learning environments. In 2017-18, \$182.2 million (including 847 FTEs, 618 of which are school-based facility operations staff) will be spent to provide safe, healthy, and clean learning environments to support student success.

### **Transportation**

The CBE is one of the largest transportation service providers in the Province of Alberta. In 2016-17 about 38,000 CBE students travel to school daily on a variety of transportation means such as the yellow school bus and Calgary Transit. Of those, approximately 26,000 ride a yellow school bus on more than 1,100 routes.

These yellow school bus riders are typically in kindergarten - Grade 9. Half are attending a regular program or are students with complex transportation needs. The other half are students enrolled in a wide range of language and non-language alternative programs. Some students do not have a community school where they live and need to travel out of their community to reach their designated school. Others choose to attend an alternative program, and others have exceptional learning needs that are best met in special settings.

The amount we receive from the Province targeted for transportation does not fully cover the cost of the service level we currently offer. The cost of transportation is approximately \$48.1 million (including 44 FTEs, 30 of which are school-based busing aides and 14 of which are schedulers, fee clerks, IT and administrative support).

Under the newly introduced Bill 1: An Act to Reduce School Fees, students attending their designated (regular program) school and living over 2.4 kilometres away from school will no longer be charged a

transportation fee. Students attending a program of choice or who live between 1.6/1.8 to 2.4 kilometres from school will be charged a fee. Parent fees totalling \$5.9<sup>1</sup> million will be charged in 2017-18 to provide services for students who don't qualify for fee-free or fee-reduced transportation under Bill 1.

### **External Services**

External Services (e.g. noon supervision program, adult education), are \$23.8 million (including 268 FTEs) in program costs that do not fall within the ECS - Grade 12 education mandate and are generally operated on a cost recovery basis (i.e. offset by related fees or other revenues). Of these amounts, \$14.0 million (including 231 FTEs) is the noon supervision program.

The noon supervision program is a school based program to provide supervision to grades one through six students over the lunch period. This is a voluntary fee-based program as parents may choose to supervise their own children over the lunch period. The noon supervision program utilizes non-teaching staff so as to maximize the teacher time available under the collective agreement to support student learning.

### **Board & System Administration<sup>2</sup>**

Finally, board & system administrative costs support student success by providing core system supports to student learning. These costs are budgeted at \$37.5 million (including 159 FTEs). The CBE has system administration costs of approximately 2.7 per cent which is well below the provincially mandated cap of 3.6 per cent of total expenditures. This means that \$12.2 million (the difference between 3.6 percent and 2.7 percent of total expenditures) of the allowable administrative allocation is made available to fund other supports to students. The CBE is committed to maximizing the dollars available to directly support students and their learning.

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<sup>1</sup> \$5.9 million is a preliminary estimate and subject to change once students have registered for transportation service and routes are developed and fee levels have been granted Ministerial approval.

<sup>2</sup> Board & System Administration includes the costs of administrative functions and core program supports for the jurisdiction at the system level. This grouping of costs is a reporting requirement of Alberta Education. Details of these expenses are provided in the Financial section of this report.

**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 2018**

Budget attributed to activities detail

|  | Instruction<br>(ECS & Grade 1-12) | Plant Operations<br>and Maintenance | Transportation | External Services | Board & System<br>Administration | Total            |
|--|-----------------------------------|-------------------------------------|----------------|-------------------|----------------------------------|------------------|
| in \$ thousands                                  |                                   |                                     |                |                   |                                  |                  |
| <b>Total expenses</b>                            |                                   |                                     |                |                   |                                  |                  |
| Certificated permanent salaries and benefits     | 762,688                           | -                                   | -              | 577               | 1,311                            | <b>764,576</b>   |
| Non-certificated permanent salaries and benefits | 162,045                           | 63,501                              | 2,717          | 13,917            | 19,793                           | <b>261,973</b>   |
| Amortization expenses                            | 16,423                            | 47,630                              | -              | 81                | 3,205                            | <b>67,339</b>    |
| Other supplies                                   | 62,850                            | 2,234                               | 14             | 572               | 326                              | <b>65,996</b>    |
| Maintenance and repairs                          | 4,786                             | 40,997                              | 1              | 94                | 1,266                            | <b>47,144</b>    |
| Transportation charges                           | 2,310                             | -                                   | 43,753         | -                 | -                                | <b>46,063</b>    |
| Certificated temporary salaries and benefits     | 27,398                            | -                                   | -              | 300               | 8                                | <b>27,706</b>    |
| Utilities  | 5,686                             | 19,084                              | 3              | 32                | 361                              | <b>25,166</b>    |
| Professional services                            | 14,338                            | 899                                 | 340            | 1,043             | 7,447                            | <b>24,067</b>    |
| Non-certificated temporary salaries and benefits | 7,428                             | 2,110                               | 89             | 2,228             | 314                              | <b>12,169</b>    |
| Rental equipment and facilities                  | 5,912                             | 495                                 | -              | 1,722             | 2,510                            | <b>10,639</b>    |
| Textbooks and materials                          | 10,260                            | -                                   | -              | 91                | 12                               | <b>10,363</b>    |
| Insurance  | 899                               | 4,009                               | -              | -                 | 94                               | <b>5,002</b>     |
| Other (uncollectible accounts)                   | -                                 | -                                   | 1,008          | 2,794             | -                                | <b>3,802</b>     |
| Minor equipment                                  | 2,059                             | 157                                 | 3              | 42                | 121                              | <b>2,382</b>     |
| Interest and finance charges                     | 675                               | 807                                 | 134            | 227               | 65                               | <b>1,908</b>     |
| Travel and subsistence                           | 1,293                             | 219                                 | 1              | 5                 | 161                              | <b>1,679</b>     |
| Dues and fees                                    | 982                               | 53                                  | 2              | 26                | 501                              | <b>1,564</b>     |
| <b>Expenses</b>                                  | <b>1,088,032</b>                  | <b>182,195</b>                      | <b>48,065</b>  | <b>23,751</b>     | <b>37,495</b>                    | <b>1,379,538</b> |
| <b>Fall Budget 2016-17</b>                       | <b>1,071,091</b>                  | <b>174,053</b>                      | <b>45,393</b>  | <b>23,188</b>     | <b>37,073</b>                    | <b>1,350,798</b> |
| <b>Increase / (decrease) from 2016-17</b>        | <b>16,941</b>                     | <b>8,142</b>                        | <b>2,672</b>   | <b>563</b>        | <b>422</b>                       | <b>28,740</b>    |

## Impacts on student learning

CBE provides a world class education program for students and families. As reported by Alberta Education for our 2015-16 year, CBE students continue to lead the Province in [academic achievement, as evidenced by our students' Provincial achievement tests and diploma exams](#). Our Accountability Pillar Overall Summary (as of May 2017) is included on the next page. The Accountability Pillar provides school authorities with a wide range of data that can be used to identify areas of success and improvement, combined with the flexibility to determine how they can best address jurisdiction needs. Jurisdiction performance is measured, evaluated and reported by comparing provincial standards (achievement) and current results against past performance (improvement) on a common set of measures for all jurisdictions, using a common evaluation method developed by Alberta Education.

This budget will support learning for all CBE students within the funding available.

Overall resources allocated to CBE schools has increased because of enrolment growth and the addition of new schools. To manage within the funding we've received, the rates used to determine allocations to individual schools have been reduced slightly. This may result in a small increase to our [student to school-based staffing ratios](#). Service unit and investment in capital projects spending has been reviewed and reduced to maximize funding available to directly support student learning.

Schools make choices about the deployment of their resources (human and financial) to meet the learning needs of students. As schools prioritize for the best use of their resources, some program offerings or services may be enhanced while others may be replaced, modified, or reduced.

Some positive impacts on student learning include:

- Student engagement and achievement will be advanced through personalized instruction and assessment.
- Resources have been allocated to support the improvement priorities identified by the Board of Trustees such as increasing the success of our First Nations, Métis, and Inuit students.
- Teachers will have time and opportunity to learn together and build their collective capacity through professional development to meet student learning needs and ensure student success.
- Classrooms and facilities will see wireless upgrades to address capacity issues, enhance security, and better support for student learning.
- Some groups of students who would most benefit from extended early learning experiences will have access to full day kindergarten at 15 locations across the school district.
- The CBE remains committed to providing seven years of English Language Learner support across the system. This decision is supported by research that confirms the increased results achieved by students with this level of support.
- Students and teachers will have access to the learning tools, resources, and environments that help create flexible, responsive and personalized learning opportunities and support student success.
- The impact of school leaders on student learning is second only to the quality of the teacher in the classroom. The leadership strategy provides opportunities for these leaders to continuously develop their capacity to lead staff to achieve the goals of the [Three-Year Education Plan](#).

**CALGARY BOARD OF EDUCATION  
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**Accountability Pillar Overall Summary  
3-Year Plan - May 2017  
Authority: 3030 Calgary School District No. 19**

| Measure Category  | Measure Category Evaluation | Measure                                    | Calgary School District No. 19 |                  |                     | Alberta        |                  |                     | Measure Evaluation |                        |            |
|---|-----------------------------|--|--------------------------------|------------------|---------------------|----------------|------------------|---------------------|--------------------|------------------------|------------|
|   |                             |  | Current Result                 | Prev Year Result | Prev 3 Year Average | Current Result | Prev Year Result | Prev 3 Year Average | Achievement        | Improvement            | Overall    |
| Safe and Caring Schools                                       | Excellent                   | Safe and Caring                            | 89.3                           | 89.8             | 89.0                | 89.5           | 89.5             | 89.3                | Very High          | Improved               | Excellent  |
| Student Learning Opportunities                                | Excellent                   | Program of Studies                         | 82.4                           | 83.2             | 82.5                | 81.9           | 81.9             | 81.5                | Very High          | Maintained             | Excellent  |
|   |                             | Education Quality                          | 89.0                           | 89.4             | 88.3                | 90.1           | 90.1             | 89.6                | High               | Improved Significantly | Good       |
|   |                             | Drop Out Rate                              | 2.7                            | 2.8              | 3.1                 | 3.0            | 3.2              | 3.3                 | Very High          | Improved Significantly | Excellent  |
|   |                             | High School Completion Rate (3 yr)         | 76.4                           | 75.2             | 75.4                | 77.9           | 76.5             | 76.1                | High               | Improved               | Good       |
| Student Learning Achievement (Grades K-9)                     | Good                        | PAT: Acceptable                            | 75.5                           | 74.8             | 74.6                | 73.6           | 72.9             | 73.4                | Intermediate       | Improved               | Good       |
|   |                             | PAT: Excellence                            | 20.4                           | 19.9             | 19.5                | 19.4           | 18.8             | 18.6                | High               | Improved               | Good       |
| Student Learning Achievement (Grades 10-12)                   | n/a                         | Diploma: Acceptable                        | 87.2                           | 88.0             | 88.2                | 85.0           | 85.2             | 85.1                | High               | Declined Significantly | Issue      |
|   |                             | Diploma: Excellence                        | 27.3                           | 27.7             | 28.1                | 21.0           | 21.0             | 20.5                | Very High          | Declined               | Good       |
|   |                             | Diploma Exam Participation Rate (4+ Exams) | 61.9                           | 61.0             | 60.9                | 54.9           | 54.6             | 53.1                | High               | Improved               | Good       |
|   |                             | Rutherford Scholarship Eligibility Rate    | 61.6                           | 61.1             | 61.1                | 62.3           | 60.8             | 60.8                | n/a                | Maintained             | n/a        |
| Preparation for Lifelong Learning, World of Work, Citizenship | Good                        | Transition Rate (6 yr)                     | 60.0                           | 60.9             | 60.9                | 57.9           | 59.4             | 59.3                | High               | Declined               | Acceptable |
|   |                             | Work Preparation                           | 78.9                           | 79.3             | 78.6                | 82.7           | 82.6             | 81.9                | High               | Maintained             | Good       |
|   |                             | Citizenship                                | 82.7                           | 83.8             | 83.1                | 83.7           | 83.9             | 83.6                | Very High          | Declined               | Good       |
| Parental Involvement  | Acceptable                  | Parental Involvement                       | 78.3                           | 78.4             | 77.8                | 81.2           | 80.9             | 80.7                | Intermediate       | Maintained             | Acceptable |
| Continuous Improvement  | Good                        | School Improvement                         | 80.1                           | 80.4             | 78.1                | 81.4           | 81.2             | 80.2                | High               | Improved Significantly | Good       |

Notes:

1. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
2. Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
3. Results for the ACOL measures are available in the detailed report: see "ACOL Measures" in the Table of Contents.
4. Survey results for the province and school authorities were impacted by the changes in the number of students responding to the survey through the introduction of the OurSCHOOL/TFM (Tell Them From Me) survey in 2014.
5. Aggregated PAT results are based upon a weighted average of percent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
6. Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
7. Aggregated Diploma results are a weighted average of percent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
8. Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
9. Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/2016 school year. Caution should be used when interpreting trends over time.
10. Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), Rutherford Scholarship Eligibility Rate results prior to 2015 are not available.

## Financial summary

### Budget highlights<sup>3</sup>

In consideration of our values and funding provided, our budget highlights are:

- Funds allocated directly to schools via the Resource Allocation Method (RAM) have increased by \$12.5 million to fund enrolment growth of 1.7 per cent and the opening of four new schools. The RAM is the mechanism used by the CBE to determine and allocate funding to each school and facilitate principal staffing and spending decision-making. The RAM book can be found [here](#).
- Instructional supplies or materials and transportation fees have been reduced or eliminated under Bill 1: An Act to Reduce School Fees which will make life more affordable for Albertans. A government grant of approximately \$18.3 million will be received in lieu of fees charged.
- This budget reflects best estimates and the assumption that transportation expenses will be fully funded by targeted government grants and fees for students who do not qualify for fee-free or fee-reduced transportation service. No dollars will be contributed from the global budget to support transportation. The portion of the fee replacement grant applied to transportation is approximately \$7.9 million in lieu of fees charged. Transportation registration and route planning was underway at the time this report was written.
- The number of school-based teachers will increase by 92 full time equivalent positions and school-based support staff by 26 full time equivalent positions.
- School budgets have been reduced by 1.4 per cent (on a status-quo basis) and service units by 3.7 per cent (on an absolute basis) of the operating budget amount that would have been required to maintain operations at a level similar to 2016-17.
- Non-facility capital project spending is budgeted at \$22.9 million, including \$2.6 million to support the commissioning of new schools scheduled to open in the 2018-19 year, \$2.2 million for wireless upgrades to address functionality issues, \$5.6 million for technology replacement and refresh and \$7.0 million for the development and implementation of the new Student Information System (SIS).
- As required by law, the budget for 2017-18 is balanced.

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<sup>3</sup> Throughout this document, the 2016-17 comparative budget figures presented are from the 2016-17 Fall Update, which was approved by the Board of Trustees on Nov. 29, 2016. Some numbers have been reclassified for comparative purposes.

**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 2018**

**2017-18 Budget and comparatives (in \$ thousands)**

|   |                    |                        | Budget 2017-18<br>vs Actuals 2015-<br>16 |                          | Budget 2017-<br>18 vs Fall<br>Budget 2016-17 |                          |             |
|---|--------------------|------------------------|--|--------------------------|--|--------------------------|-------------|
|   | Actuals<br>2015-16 | Fall Budget<br>2016-17 | Budget<br>2017-18                        | Increase /<br>(Decrease) | %  | Increase /<br>(Decrease) | %           |
| <b>Revenues</b>   |                    |                        |  |                          |  |                          |             |
| Alberta Education   | 1,208,794          | 1,230,690              | 1,274,436                                | 65,642                   |  | 43,746                   |             |
| Fees  | 49,876             | 51,456                 | 38,094                                   | (11,782)                 |  | (13,362)                 |             |
| Other sales and services                                  | 27,272             | 19,360                 | 25,144                                   | (2,128)                  |  | 5,784                    |             |
| All other revenue   | 23,891             | 22,853                 | 20,162                                   | (3,729)                  |  | (2,691)                  |             |
| Federal Government and First Nations                      | 2,987              | 2,650                  | 3,207                                    | 220                      |  | 557                      |             |
| Investment income   | 12,146             | 3,345                  | 3,167                                    | (8,979)                  |  | (178)                    |             |
| Other - Government of Alberta                             | 733                | 618                    | 328                                      | (405)                    |  | (290)                    |             |
|   | <b>1,325,699</b>   | <b>1,330,972</b>       | <b>1,364,538</b>                         | <b>38,839</b>            | <b>2.9%</b>                                  | <b>33,566</b>            | <b>2.5%</b> |
| <b>Expenses by block</b>                                  |                    |                        |  |                          |  |                          |             |
| Instruction - Grade 1-12                                  | 988,983            | 1,015,538              | 1,030,679                                | 41,696                   |  | 15,141                   |             |
| Plant operations and maintenance                          | 167,923            | 174,053                | 182,195                                  | 14,272                   |  | 8,142                    |             |
| Instruction - Early Childhood Services                    | 49,003             | 55,553                 | 57,353                                   | 8,350                    |  | 1,800                    |             |
| Transportation  | 48,447             | 45,393                 | 48,065                                   | (382)                    |  | 2,672                    |             |
| Board & system administration                             | 33,548             | 37,073                 | 37,495                                   | 3,947                    |  | 422                      |             |
| External services   | 23,234             | 23,188                 | 23,751                                   | 517                      |  | 563                      |             |
|   | <b>1,311,138</b>   | <b>1,350,798</b>       | <b>1,379,538</b>                         | <b>68,400</b>            | <b>5.2%</b>                                  | <b>28,740</b>            | <b>2.1%</b> |
| <b>Expenses by object</b>                                 |                    |                        |  |                          |  |                          |             |
| Salaries and benefits                                     | 1,019,207          | 1,037,993              | 1,066,424                                | 47,217                   |  | 28,431                   |             |
| Services, contracts and supplies                          | 233,130            | 247,869                | 240,065                                  | 6,935                    |  | (7,804)                  |             |
| Other (interest, amortization and uncollectible accounts) | 58,801             | 64,936                 | 73,049                                   | 14,248                   |  | 8,113                    |             |
|   | <b>1,311,138</b>   | <b>1,350,798</b>       | <b>1,379,538</b>                         | <b>68,400</b>            | <b>5.2%</b>                                  | <b>28,740</b>            | <b>2.1%</b> |
| <b>Annual surplus / (deficit)</b>                         | <b>14,561</b>      | <b>(19,826)</b>        | <b>(15,000)</b>                          | <b>(29,561)</b>          |  | <b>4,826</b>             |             |
| <b>Net applications of operating funds</b>                | <b>1,130</b>       | <b>33,040</b>          | <b>5,000</b>                             | <b>3,870</b>             |  | <b>(28,040)</b>          |             |
| <b>Capital transactions</b>                               |                    |                        |  |                          |  |                          |             |
| Board funded amortization                                 | 22,871             | 24,229                 | 28,150                                   | 5,279                    |  | 3,921                    |             |
| Capital assets acquired                                   | (34,463)           | (59,625)               | (19,618)                                 | 14,845                   |  | 40,007                   |             |
| Use of capital reserves                                   | (3,002)            | 25,947                 | 4,760                                    | 7,762                    |  | (21,187)                 |             |
| Debt repayments   | (1,097)            | (3,765)                | (3,292)                                  | (2,195)                  |  | 473                      |             |
|   | <b>(15,691)</b>    | <b>(13,214)</b>        | <b>10,000</b>                            | <b>25,691</b>            |  | <b>23,214</b>            |             |
| <b>Net operating surplus</b>                              | <b>-</b>           | <b>-5-35</b>           | <b>-</b>                                 | <b>-</b>                 |  | <b>-</b>                 |             |

**Summary of changes from prior year budget (in \$ thousands)**

|   | Fall Budget<br>2016-17 | Budget changes |   |                                   |  |                                      |                            |                |                                 | Budget<br>2017-18 |                    |
|---|------------------------|----------------|---|-----------------------------------|--|--------------------------------------|----------------------------|----------------|---------------------------------|-------------------|--------------------|
|   |                        | Enrolment      | Remove<br>2016-17<br>one-time<br>activities | Non<br>discretionary<br>increases | Increase in<br>operating<br>costs for<br>new schools | Reduced<br>allocations<br>to schools | Service unit<br>reductions | Transportation | New fee<br>replacement<br>grant |                   | Use of<br>reserves |
| <b>Revenues</b>   |                        |                |   |                                   |  |                                      |                            |                |                                 |                   |                    |
| Alberta Education   | 1,230,690              | 20,738         |   | 6,050                             |  |                                      |                            | 6,568          | 10,390                          |                   | 1,274,436          |
| Fees  | 51,456                 | (702)          |   |                                   |  |                                      |                            | (2,781)        | (9,879)                         |                   | 38,094             |
| Other sales and services                                  | 19,360                 | 5,914          |   | 51                                |  | (181)                                |                            |                |                                 |                   | 25,144             |
| All other revenue   | 22,853                 | (2,633)        |   | (58)                              |  |                                      |                            |                |                                 |                   | 20,162             |
| Federal Government and First Nations                      | 2,650                  |                |   | 557                               |  |                                      |                            |                |                                 |                   | 3,207              |
| Investment income   | 3,345                  | (178)          |   |                                   |  |                                      |                            |                |                                 |                   | 3,167              |
| Other - Government of Alberta                             | 618                    | (290)          |   |                                   |  |                                      |                            |                |                                 |                   | 328                |
|   | <b>1,330,972</b>       | <b>22,849</b>  | <b>-</b>                                    | <b>6,600</b>                      | <b>-</b>   | <b>(181)</b>                         | <b>-</b>                   | <b>3,787</b>   | <b>511</b>                      | <b>-</b>          | <b>1,364,538</b>   |
| <b>Expenses by object</b>                                 |                        |                |   |                                   |  |                                      |                            |                |                                 |                   |                    |
| Certificated salaries and benefits                        | 775,314                | 6,571          | (550)                                       | 11,792                            | 997  | (1,861)                              | 19                         |                |                                 |                   | 792,282            |
| Non-certificated salaries and benefits                    | 262,679                | 11,667         | (155)                                       | 6,653                             | 498  | (2,928)                              | (4,282)                    | 10             |                                 |                   | 274,142            |
| Services, contracts and supplies                          | 247,869                | 3,428          | (6,459)                                     | 3,147                             | 847  | (6,392)                              | (3,337)                    | (750)          | 1,712                           |                   | 240,065            |
| Amortization  | 57,370                 | 2              |   | 9,967                             |  |                                      |                            |                |                                 |                   | 67,339             |
| Other (uncollectible accounts)                            | 5,443                  | 33             |   |                                   |  |                                      |                            | (473)          | (1,201)                         |                   | 3,802              |
| Interest and finance charges                              | 2,123                  |                |   | (215)                             |  |                                      |                            |                |                                 |                   | 1,908              |
|   | <b>1,350,798</b>       | <b>21,701</b>  | <b>(7,164)</b>                              | <b>31,344</b>                     | <b>2,342</b>   | <b>(11,181)</b>                      | <b>(7,600)</b>             | <b>(1,213)</b> | <b>511</b>                      | <b>-</b>          | <b>1,379,538</b>   |
| <b>Annual surplus / (deficit)</b>                         | <b>(19,826)</b>        | <b>1,148</b>   | <b>7,164</b>                                | <b>(24,744)</b>                   | <b>(2,342)</b>                                       | <b>11,000</b>                        | <b>7,600</b>               | <b>5,000</b>   | <b>-</b>                        | <b>-</b>          | <b>(15,000)</b>    |
| <b>Transfer from operating reserves</b>                   | <b>33,040</b>          |                | <b>(7,164)</b>                              |                                   |  |                                      |                            |                |                                 | <b>(20,876)</b>   | <b>5,000</b>       |
| <b>Add/(deduct) capital items paid by operating funds</b> |                        |                |   |                                   |  |                                      |                            |                |                                 |                   |                    |
| Board funded amortization                                 | 24,229                 |                |   | 3,921                             |  |                                      |                            |                |                                 |                   | 28,150             |
| Capital acquisitions                                      | (59,625)               |                | 40,007                                      |                                   |  |                                      |                            |                |                                 |                   | (19,618)           |
| Use of capital reserves                                   | 25,947                 |                |   |                                   |  |                                      |                            |                |                                 | (21,187)          | 4,760              |
| Debt repayments   | (3,765)                |                |   | 473                               |  |                                      |                            |                |                                 |                   | (3,292)            |
|   | <b>(13,214)</b>        |                | <b>40,007</b>                               | <b>4,394</b>                      |  |                                      |                            |                |                                 | <b>(21,187)</b>   | <b>10,000</b>      |
| <b>Net operating surplus / (deficit)</b>                  | <b>-</b>               | <b>1,148</b>   | <b>40,007</b>                               | <b>(20,350)</b>                   | <b>(2,342)</b>                                       | <b>11,000</b>                        | <b>7,600</b>               | <b>5,000</b>   | <b>-</b>                        | <b>(42,063)</b>   | <b>-</b>           |
| Notes:  |                        | (1)            | (2)   | (3)                               | (4)  | (5)                                  | (6)                        | (7)            | (8)                             | (9)               |                    |

Budget change additional information notes

- (1) Enrolment: Enrolment changes include funding increases from the Province and increased spending needs related to enrolment, as well as adjustments to School Generated Funds (SGF) for enrolment and activity levels.
- (2) Remove 2016-17 one-time activities: One-time projects from 2016-17 are removed from the 2017-18 budget such as amounts that were carried forward for projects that continued from 2015-16 into 2016-17.
- (3) Non-discretionary increases: Adjustments have been made to amortization expense (and related revenue recognized, where applicable), changes for grid movement for existing staff in accordance with collective agreements and employee terms of reference, contractual commitments, impacts of utility rates, foreign exchange pressures, and other non-discretionary changes.
- (4) Increase in operating costs for new schools: operating costs related to the opening of new schools including the cost of school-based administrative staff and operating costs such as internet connectivity, insurance and utilities.
- (5) Reduced allocations to schools: overall funding to schools has been reduced by 1.4 per cent from the amount that would have been required to fully maintain service levels in order to meet budget balancing targets. Due to enrolment growth and the need to fund new schools the overall allocation to schools will increase by \$12.5 million.
- (6) Service unit reductions: to minimize the direct impact on student learning, service units have been reduced by 3.7 per cent of their operating budget balance in 2016-17 in order to meet budget balancing targets.
- (7) Transportation: the transportation program has been adjusted for changes from Bill 1 and the resulting fee replacement grant as well as the elimination of contribution from the global budget to support transportation.
- (8) New fee replacement grant: under Bill 1, transportation and instructional supplies or materials fees have been reduced or eliminated as well as the corresponding waiver and uncollectible account costs. The fee replacement government grant will replace the loss of fee revenue.
- (9) Use of reserves: the use of reserves is adjusted from what was used to balance the budget in 2016-17 versus 2017-18.

## Revenue summary

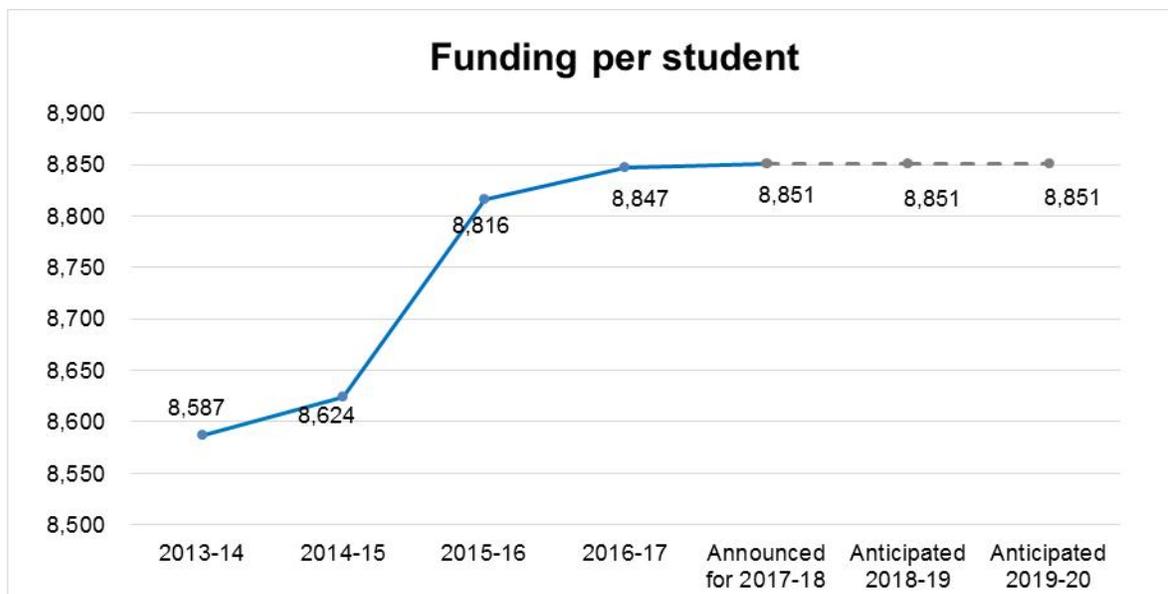
The CBE has benefited from the current Provincial Government’s support of, and commitment to, public education. With over 93 per cent of our funding coming from the Province, even a small change in funding rates or funding methodologies impacts all of our students, parents and staff.

The Alberta Government has committed to maintaining stability for public education by way of stabilized funding rates and continuing to fund growth in enrolment. The Alberta Government continues to operate in a financially constrained environment; however, Alberta Education has maintained funding rates at 2015-16 levels with the exception of changes to the funding rate for Credit Enrolment Units (CEUs), which are anticipated to have minimal impact on the CBE.

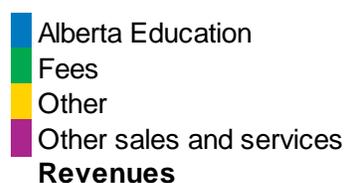
The increased level of funding the CBE will receive in 2017-18 will not be sufficient to maintain services at levels similar to those provided in the 2016-17 school year.

‘Funding per student’ is Alberta Education funding divided by total enrolment. We saw a significant increase in 2015-16 funding per student with the election of a new Provincial Government. The amount is assumed to remain flat into 2018-19 and future years.

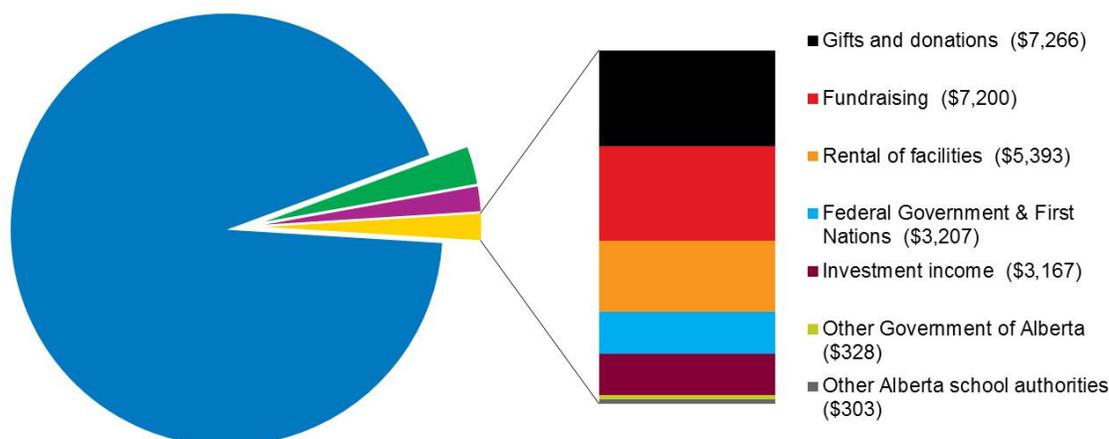
The chart below shows Funding per student using actuals for the years that have ended and estimates for the current year and future years. Funding does not include amounts for Infrastructure Maintenance & Renewal (IMR), the Alberta Teachers’ Retirement Fund, transportation grants, fee replacement grant or expended deferred capital revenues, as these grants are targeted and do not fund regular operations.



## Revenue highlights



| <b>Budget</b>     |             | <b>Fall Budget</b> |
|-------------------|-------------|--------------------|
| <b>2017-18</b>    |             | <b>2016-17</b>     |
| (in \$ thousands) | %           | (in \$ thousands)  |
| 1,274,436         | 93%         | 1,230,690          |
| 38,094            | 3%          | 51,456             |
| 26,864            | 2%          | 29,466             |
| 25,144            | 2%          | 19,360             |
| <b>1,364,538</b>  | <b>100%</b> | <b>1,330,972</b>   |



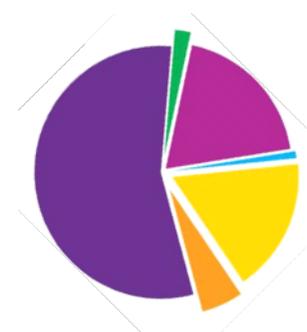
- **Alberta Education** – includes grants received based on projected September 30 enrolment. Alberta Education has maintained funding rates at 2015-16 levels with the exception of changes to the funding rate for Credit Enrolment Units (CEUs), which is anticipated to have minimal impact on the CBE, and a change to the Small Schools by Necessity funding, which is not applicable to the CBE.
- **Fees** – fees collected for the transportation of students who do not qualify for fee-free transportation, the supervision of students who stay at school for lunch, field trips, and additional programming such as alternative program fees and fees for optional courses.
  - All revenue from Alberta Education related to transportation and ISM will be fully applied to the cost of these services. There will be no contribution from the global budget to support fee-based programs and services. Fee revenue for transportation and noon supervision will fully fund the gap between Alberta Education funding, if any, (for example, transportation) and direct program costs, including waivers and uncollectable accounts.
  - As a result of Bill 1: An Act to Reduce School Fees, fee revenue for 2017-18 will decline as fewer parents pay fees. ISM fees have been eliminated for those items that are included under the Government’s working definition for Instructional supplies or materials as well as the transportation fees for students who qualify for fee-free or fee-reduced transportation service.
  - Currently there is no provincial funding for the Grade 1 – 6 noon supervision program. This program is solely funded by school fees. Approximately 50,900 Grade 1 – 6 students are registered and supervised through the noon hour program in CBE schools (April 2017 estimate). For the 2017-18 year noon supervision fees will be maintained at 2016-17 rates and service levels adjusted due to increased labour costs.

- **Other** – includes donations received, fundraising at schools, investment income and revenues from the rental of facilities.
- **Other sales and services** – revenue collected from international students attending CBE schools, instruction fees paid by adult learners, and general sales revenue from cafeteria sales and the provision of services by students like cosmetology and automotive.

## Expense summary

### Expenses by type

|   | Budget<br>2017-18 |             | Fall Budget<br>2016-17 |
|---|-------------------|-------------|------------------------|
|   | (in \$ thousands) | %           | (in \$ thousands)      |
| Certificated permanent salaries and benefits              | 764,576           | 55%         | 751,779                |
| Non-certificated permanent salaries and benefits          | 261,973           | 19%         | 253,696                |
| Services, contracts and supplies                          | 240,065           | 18%         | 247,869                |
| Other (interest, amortization and uncollectible accounts) | 73,049            | 5%          | 64,936                 |
| Certificated temporary salaries and benefits              | 27,706            | 2%          | 23,535                 |
| Non-certificated temporary salaries and benefits          | 12,169            | 1%          | 8,983                  |
| <b>Expenses by type</b>                                   | <b>1,379,538</b>  | <b>100%</b> | <b>1,350,798</b>       |



### Expenses by activity

|                             | Budget<br>2017-18 |             | Fall Budget<br>2016-17 |
|-----------------------------|-------------------|-------------|------------------------|
|                             | (in \$ thousands) | %           | (in \$ thousands)      |
| Schools and area supports   | 1,037,235         | 75%         | 1,020,851              |
| Service unit supports       | 342,303           | 25%         | 329,947                |
| <b>Expenses by activity</b> | <b>1,379,538</b>  | <b>100%</b> | <b>1,350,798</b>       |



*Schools and Area supports* includes amounts allocated directly to schools via the RAM, facility operations staff in schools, area office budgets and centrally held budgets that directly support school operations, such as the Alberta Teachers Retirement Fund (ATRF), School Generated Funds (SGF), central budgets for sick relief in schools, etc.

*Service unit supports* include direct and indirect supports for students. These supports wrap around each student and improve the quality of learning and access to education. This also includes the cost of service units that operate the CBE's business processes (e.g. payroll, recruiting, procurement, legal services, technology support, etc.) as well as the costs for constructing, operating and maintaining safe and secure facilities, providing student transportation, providing central learning supports, amortization of school buildings and other capital assets and the Board of Trustees budget.

Expenses have increased by a net amount of \$28.7 million from 2016-17 primarily to support enrolment growth of 1.7 per cent, four new schools opening, contractual obligations and increased amortization expense.

## Capital projects

### Major capital projects – new schools and major modernization

The CBE appreciates that the Provincial Government has recognized the incredible growth in our student numbers and is building many of the schools required to meet their needs. During the past year the CBE has opened 20 new, replacement and modernized schools and has seven more projects underway with opening dates scheduled for 2017-18 (four) and 2018-19 (three). Three more new schools and one major modernization were announced on March 21, 2017 for completion beyond 2018. Information on these projects is available on [the CBE's website](#) as well as in the Informational section of this report.

The additional fixed costs of operating four new schools (Ron Southern School, Manmeet Singh Bhullar School, Marshall Springs School and Griffith Woods School) is approximately \$2.3 million for 2017-18 and has been incorporated into this budget. These costs relate to school-based administrative staff and operating costs such as internet connectivity, insurance and utilities. These are fixed operating costs which are not specifically addressed in the Alberta Education funding framework.

Over the two school years from 2016-17 through 2017-18 the CBE's fixed operating costs, due to the opening of more than [24 new and modernized schools](#), have increased by more than \$13.8 million. As we are funded based on students rather than facilities, this increase is largely unfunded. By way of comparison, prior to 2016 the CBE opened between two and three new schools each year on average. Opening 24 new schools in just two years creates a significant resourcing and administrative challenge.

The CBE is incurring costs in 2015-16 through 2017-18 beyond those provided by the Province for furniture and equipment and to prepare the new schools for opening day. These costs include preparing the learning environment with learning materials, sound systems, specialty equipment and technology. Other costs are related to staff time (principals, assistant principals, learning leaders, administrative assistants, etc.) required to engage with the new school communities, develop time tables and make pre-opening curricular decisions. To date, the CBE has committed up to \$28.1 million for these activities.

The CBE is having ongoing conversations with Alberta Education on the cost of opening and operating new schools.

### Non-facility capital activities

Non-facility capital activities are funded through the cash made available from non-facility amortization expense, which does not consume cash, as well as capital reserves dollars that have been accumulated over time. As part of budget development, decisions are made on how those amounts will be spent.

Non-facility (sometimes referred to as “board-funded” or “non Alberta infrastructure”) capital projects are separate from the capital activities associated with the building of new schools or major modernizations. Those projects are supported by additional capital grants approved and provided by the Provincial Government through a separate capital planning process.

Non-facility capital needs are funded from in-year operating grants or targeted funds, if any. The budget is generally established based on the non-facility amortization expense for the year. The anticipated funding available from amortization for non-facility capital in 2017-18 is \$28.2 million. The capital budget has been reduced by \$10 million in order to balance the overall CBE budget. Five million of this reduction will be garnered by reducing the scope and/or number of projects supported and the other \$5 million will be supported by the use of Infrastructure, Maintenance and Renewal (IMR) funding to continue the work of qualifying projects.

Reserves may also be used to fund capital activities. Up to \$4.8 million of board-funded capital spending will be funded from draws on capital reserves to support up to \$2.2 million for the gymnasium at Nelson Mandela High School as well as up to \$2.6 million for the additional cost of commissioning the Seton High School and two modernizations. These amounts are required in addition to funds that have already been identified in the 2016-17 budget for commissioning.

The resulting board-funded capital spending plan for the year is \$22.9 million.

| in \$ thousands                                  |               |
|--|---------------|
| Board-funded capital amortization                | 28,150        |
| Use of capital reserves                          | 4,760         |
| Reduction in scope and/or number of projects     | (5,000)       |
| Use of IMR for upgrading educational areas       | (5,000)       |
| <b>Resulting budget for board-funded capital</b> | <b>22,910</b> |

## Use of reserves and balancing

If the CBE were to maintain the same level of services as in 2016-17, we would be facing a **\$38.6 million shortfall** in the 2017-18 year before the application of available reserves, other one-time funding contributions and/or cost reductions. We have balanced the budget as follows:

- \$5 million reduction in board-funded capital activities to support ongoing operations
- \$5 million reduction in board-funded capital, to be funded via IMR grants
- \$5 million use of operating reserves
- \$5 million from eliminating the projected transfer of funding from total Alberta Education grants to fund the transportation program
- \$7.6 million in service unit budget reductions (3.7% of total service unit funding)
- \$11 million in school budget reductions (1.4% of allocations through the RAM)

The budget assumes the CBE will end the 2016-17 school year with available-for-use operating reserves of approximately \$19.3 million and \$19.6 million in capital reserves. Given the anticipated continuation of new school construction, the CBE will retain modest operational reserves to fully support the commissioning of approved new schools. This is consistent with the CBE's commitment to spend dollars received in a year on the students receiving service in that year.

The CBE budgets approximately \$0.9 million to commission an elementary school and \$1.3 million for a middle school. The amount of reserves available for use in 2017-18 is also contingent upon the funding request made to the Province to cover the cost of project management services associated with new school construction projects. We anticipate a final answer on these requests upon submission to Alberta Education of the statements of final costs associated with each project. These submissions will commence by August, 2018 as they are due within two years of substantial completion of each project.

Finally, the use of reserves falls fully within the purview of the Board of Trustees. The use of reserves set out in this budget report will be considered approved with Board of Trustee approval of this budget report, subject to any modifications by way of board motion.

**Summary of reserves (in \$ thousands)**

|  | <b>Anticipated<br/>reserve balance<br/>Sept. 1, 2017</b> | <b>Planned use</b> | <b>Anticipated<br/>reserve balance<br/>Aug. 31, 2018</b> |
|--|--|--------------------|--|
| <b>Operating reserves use<sup>1</sup></b>              |  |                    |  |
| Available for use reserves                             | 19,268   | (5,000)            | 14,268   |
| <b>Capital reserves use</b>                            |  |                    |  |
| Building reserve                                       | 9,019  | (2,200)            | 6,819  |
| Other capital reserves                                 | 9,756  | (2,560)            | 7,196  |
| Plant, operations and maintenance asset<br>replacement | 798  | -                  | 798  |
| Total capital reserves                                 | 19,573   | (4,760)            | 14,813   |

<sup>1</sup> Not shown above are restricted reserves. These are reserves that cannot be used to fund operations. It is comprised of \$1.8 million of EducationMatters reserves that are consolidated with the CBE for financial reporting purposes as well as (\$10.2 million) in the 'Changes in accounting policy reserve' which was established upon conversion to Public Sector Accounting Standards. (\$1.8 million - \$10.2 million = \$8.4 million restricted reserves)

## Informational summary

### Forecasts

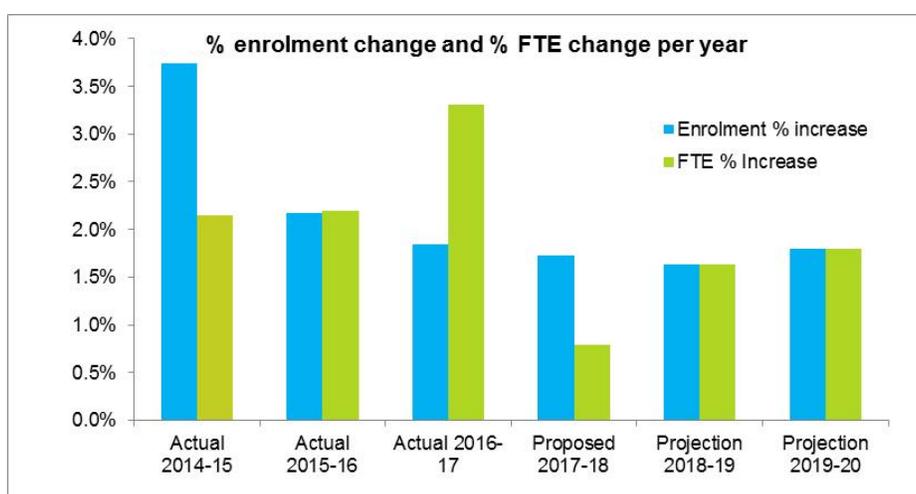
In addition to the preparation of the 2017-18 year budget, we have forecasted the next three years, assuming that funding rates are maintained and staffing is increased to maintain student to school-based staff ratios. Central staffing levels are not assumed to increase with enrolment and are assumed to remain fixed into the forecast years.

The forecast years also assume a zero wage rate increase for all union groups and associations. The cost of grid movement has been incorporated. All collective agreements are currently open for wage renegotiation.

The forecast is based on enrolment projections.

| <b>Enrolment by program</b> | <b>Actual<br/>2014-15</b> | <b>Actual<br/>2015-16</b> | <b>Actual<br/>2016-17</b> | <b>Projection<br/>2017-18</b> | <b>Projection<br/>2018-19</b> | <b>Projection<br/>2019-20</b> | <b>Projection<br/>2020-21</b> |
|-----------------------------|---------------------------|---------------------------|---------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| Grades 1-6                  | 51,253                    | 53,329                    | 55,122                    | <b>56,393</b>                 | 57,733                        | 58,315                        | 58,558                        |
| Grades 7-9                  | 22,237                    | 22,624                    | 23,292                    | <b>24,076</b>                 | 24,998                        | 26,189                        | 27,424                        |
| Grades 10-12                | 26,420                    | 26,375                    | 26,442                    | <b>25,880</b>                 | 25,809                        | 26,121                        | 27,001                        |
| Pre-K and Kindergarten      | 9,389                     | 9,389                     | 9,298                     | <b>9,759</b>                  | 9,464                         | 9,510                         | 9,675                         |
| Chinook Learning Services   | 2,393                     | 2,327                     | 2,219                     | <b>2,259</b>                  | 2,298                         | 2,335                         | 2,378                         |
| Outreach Programs           | 1,281                     | 1,384                     | 1,337                     | <b>1,366</b>                  | 1,390                         | 1,412                         | 1,438                         |
| Unique Settings             | 690                       | 676                       | 729                       | <b>745</b>                    | 758                           | 770                           | 784                           |
| Cbe-Learn                   | 589                       | 611                       | 459                       | <b>468</b>                    | 476                           | 484                           | 493                           |
| Home Education              | 248                       | 270                       | 249                       | <b>254</b>                    | 259                           | 263                           | 268                           |
| <b>Total</b>                | <b>114,500</b>            | <b>116,985</b>            | <b>119,147</b>            | <b>121,200</b>                | <b>123,185</b>                | <b>125,399</b>                | <b>128,018</b>                |
| Total annual change         |                           | 2,485                     | 2,162                     | <b>2,053</b>                  | 1,985                         | 2,214                         | 2,619                         |
| Total % change              |                           | 2.2%                      | 1.8%                      | <b>1.7%</b>                   | 1.6%                          | 1.8%                          | 2.1%                          |

The chart below demonstrates the historical and projected relationship between changes in student enrolment and staffing. Without reliable and adequate funding, staffing does not always increase in relation to enrolment growth.



**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 2018**

**2017-18 Budget and forecast years**

|   | Actuals<br>2013-14 |           | Actuals<br>2014-15 |           | Actuals<br>2015-16 |           | Fall Budget<br>2016-17 |           | Budget<br>2017-18 |           | Forecasts<br>2018-19 |           | Forecasts<br>2019-20 |           | Forecasts<br>2020-21 |           |
|---|--------------------|-----------|--------------------|-----------|--------------------|-----------|------------------------|-----------|-------------------|-----------|----------------------|-----------|----------------------|-----------|----------------------|-----------|
|   | FTE                | \$ 000    | FTE                | \$ 000    | FTE                | \$ 000    | FTE                    | \$ 000    | FTE               | \$ 000    | FTE                  | \$ 000    | FTE                  | \$ 000    | FTE                  | \$ 000    |
| <b>Revenues</b>   |                    |           |                    |           |                    |           |                        |           |                   |           |                      |           |                      |           |                      |           |
| Alberta Education   |                    | 1,101,997 |                    | 1,144,396 |                    | 1,208,794 |                        | 1,230,690 |                   | 1,274,436 |                      | 1,296,616 |                      | 1,318,232 |                      | 1,343,578 |
| Fees  |                    | 40,453    |                    | 47,148    |                    | 49,876    |                        | 51,456    |                   | 38,094    |                      | 38,718    |                      | 39,414    |                      | 40,122    |
| Other sales and services                                  |                    | 20,677    |                    | 24,329    |                    | 27,272    |                        | 19,360    |                   | 25,144    |                      | 25,556    |                      | 26,015    |                      | 26,483    |
| All other revenue   |                    | 25,207    |                    | 22,767    |                    | 23,891    |                        | 22,853    |                   | 20,162    |                      | 20,488    |                      | 20,851    |                      | 21,220    |
| Federal Government and First Nations                      |                    | 2,329     |                    | 2,904     |                    | 2,987     |                        | 2,650     |                   | 3,207     |                      | 3,207     |                      | 3,207     |                      | 3,207     |
| Investment income   |                    | 7,395     |                    | 14,863    |                    | 12,146    |                        | 3,345     |                   | 3,167     |                      | 3,167     |                      | 3,167     |                      | 3,167     |
| Other - Government of Alberta                             |                    | 1,386     |                    | 1,108     |                    | 733       |                        | 618       |                   | 328       |                      | 328       |                      | 328       |                      | 328       |
|   |                    | 1,199,444 |                    | 1,257,515 |                    | 1,325,699 |                        | 1,330,972 |                   | 1,364,538 |                      | 1,388,080 |                      | 1,411,214 |                      | 1,438,105 |
| <b>Expenses by block</b>                                  |                    |           |                    |           |                    |           |                        |           |                   |           |                      |           |                      |           |                      |           |
| Instruction - Grades 1-12                                 | 7,532              | 892,719   | 7,716              | 940,461   | 7,877              | 988,983   | 8,106                  | 1,015,538 | 8,206             | 1,030,679 | 8,331                | 1,063,564 | 8,469                | 1,093,528 | 8,591                | 1,125,592 |
| Plant operations and maintenance                          | 825                | 151,746   | 829                | 157,489   | 826                | 167,923   | 884                    | 174,053   | 847               | 182,195   | 860                  | 188,008   | 874                  | 193,305   | 887                  | 198,973   |
| Instruction - Early Childhood Services                    | 390                | 44,996    | 436                | 49,136    | 481                | 49,003    | 518                    | 55,553    | 526               | 57,353    | 534                  | 59,182    | 543                  | 60,850    | 551                  | 62,634    |
| Transportation  | 41                 | 40,815    | 43                 | 44,336    | 43                 | 48,447    | 43                     | 45,393    | 44                | 48,065    | 44                   | 49,598    | 45                   | 50,996    | 46                   | 52,491    |
| Board & system administration                             | 164                | 36,603    | 158                | 33,917    | 156                | 33,548    | 158                    | 37,073    | 159               | 37,495    | 162                  | 38,691    | 165                  | 39,781    | 167                  | 40,947    |
| External services   | 294                | 23,421    | 263                | 20,814    | 270                | 23,234    | 262                    | 23,188    | 268               | 23,751    | 272                  | 24,509    | 277                  | 25,199    | 281                  | 25,938    |
|   | 9,245              | 1,190,300 | 9,444              | 1,246,153 | 9,652              | 1,311,138 | 9,971                  | 1,350,798 | 10,050            | 1,379,538 | 10,202               | 1,423,552 | 10,373               | 1,463,659 | 10,522               | 1,506,575 |
| <b>Expenses by object</b>                                 |                    |           |                    |           |                    |           |                        |           |                   |           |                      |           |                      |           |                      |           |
| Certificated permanent salaries and benefits              | 5,990              | 675,027   | 6,150              | 702,172   | 6,265              | 727,897   | 6,472                  | 751,779   | 6,562             | 764,576   | 6,669                | 793,641   | 6,789                | 821,405   | 6,902                | 847,763   |
| Non-certificated permanent salaries and benefits          | 3,255              | 222,259   | 3,294              | 233,449   | 3,388              | 237,347   | 3,499                  | 253,696   | 3,488             | 261,973   | 3,533                | 267,668   | 3,584                | 273,351   | 3,621                | 278,446   |
| Services, contracts and supplies                          |                    | 207,290   |                    | 217,687   |                    | 233,130   |                        | 247,869   |                   | 240,065   |                      | 246,428   |                      | 252,985   |                      | 259,349   |
| Amortization  |                    | 52,158    |                    | 51,644    |                    | 52,092    |                        | 57,370    |                   | 67,339    |                      | 70,139    |                      | 70,139    |                      | 75,139    |
| Certificated temporary salaries and benefits              |                    | 20,557    |                    | 26,355    |                    | 41,974    |                        | 23,535    |                   | 27,706    |                      | 27,704    |                      | 27,704    |                      | 27,704    |
| Non-certificated temporary salaries and benefits          |                    | 9,586     |                    | 11,251    |                    | 11,988    |                        | 8,983     |                   | 12,169    |                      | 12,168    |                      | 12,168    |                      | 12,168    |
| Other (uncollectible accounts)                            |                    | 1,321     |                    | 1,557     |                    | 5,196     |                        | 5,443     |                   | 3,802     |                      | 3,863     |                      | 3,932     |                      | 3,997     |
| Interest and finance charges                              |                    | 2,102     |                    | 2,038     |                    | 1,514     |                        | 2,123     |                   | 1,908     |                      | 1,941     |                      | 1,975     |                      | 2,009     |
|   | 9,245              | 1,190,300 | 9,444              | 1,246,153 | 9,652              | 1,311,138 | 9,971                  | 1,350,798 | 10,050            | 1,379,538 | 10,202               | 1,423,552 | 10,373               | 1,463,659 | 10,522               | 1,506,575 |
| <b>Surplus / (deficit)</b>                                |                    | 9,144     |                    | 11,362    |                    | 14,561    |                        | (19,826)  |                   | (15,000)  |                      | (35,472)  |                      | (52,444)  |                      | (68,470)  |
| <b>Transfers from / (to) operating reserves</b>           |                    | (6,855)   |                    | 3,760     |                    | 1,130     |                        | 33,040    |                   | 5,000     |                      | -         |                      | -         |                      | -         |
| <b>Add/(deduct) capital items paid by operating funds</b> |                    |           |                    |           |                    |           |                        |           |                   |           |                      |           |                      |           |                      |           |
| Capital assets acquired                                   |                    | (22,367)  |                    | (28,817)  |                    | (35,560)  |                        | (63,390)  |                   | (22,910)  |                      | (28,150)  |                      | (28,150)  |                      | (28,150)  |
| Board funded amortization                                 |                    | 21,505    |                    | 21,837    |                    | 22,871    |                        | 24,229    |                   | 28,150    |                      | 28,150    |                      | 28,150    |                      | 28,150    |
| Transfer from / (to) capital reserves'                    |                    | (1,427)   |                    | (8,142)   |                    | (3,002)   |                        | 25,947    |                   | 4,760     |                      | -         |                      | -         |                      | -         |
|   |                    | (2,289)   |                    | (15,122)  |                    | (15,691)  |                        | (13,214)  |                   | 10,000    |                      | -         |                      | -         |                      | -         |
| <b>Costs to be reduced/efficiencies to identify</b>       |                    | -         |                    | -         |                    | -         |                        | -         |                   | -         |                      | (35,472)  |                      | (52,444)  |                      | (68,470)  |

## Staff resource projections

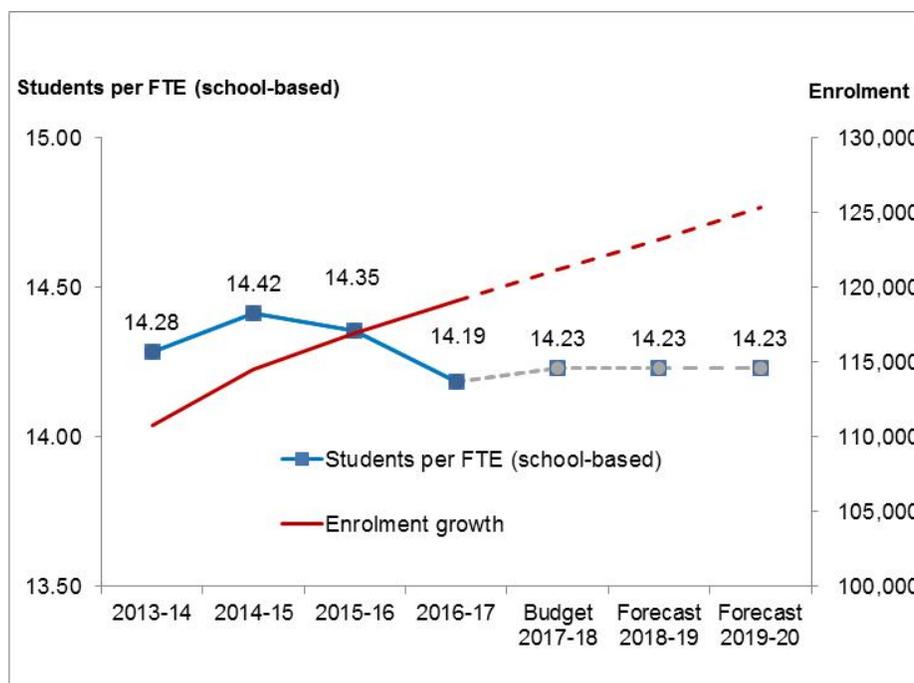
Based on enrolment projections, we assume that staffing resources increase by the number required to maintain student to school-based staffing ratios in the forecast years. We also assume that non-school based staffing resources are not increased at the same rate as enrolment.

For the purposes of this table, non-school based FTEs include facility operations staff who work in schools as well as psychologists, braille assistants, deaf and hard of hearing specialists, mental health specialists, occupational and physical therapists, and speech language pathologists:

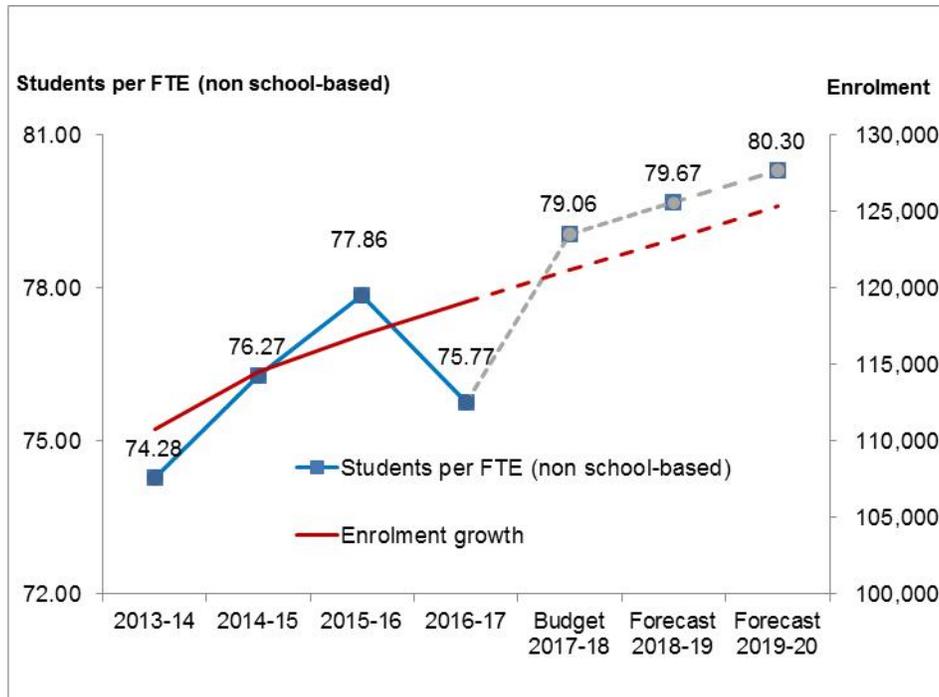
| FTEs by:                          | Actuals<br>2013-14 | Actuals<br>2014-15 | Actuals<br>2015-16 | Fall Budget<br>2016-17 | Budget<br>2017-18 | Forecast<br>2018-19 | Forecast<br>2019-20 |
|-----------------------------------|--------------------|--------------------|--------------------|------------------------|-------------------|---------------------|---------------------|
| School based certificated         | 5,831              | 5,978              | 6,093              | 6,294                  | <b>6,386</b>      | 6,490               | 6,607               |
| School based non certificated     | 1,923              | 1,964              | 2,057              | 2,105                  | <b>2,131</b>      | 2,166               | 2,205               |
| Non-school based non certificated | 750                | 748                | 748                | 766                    | <b>739</b>        | 739                 | 739                 |
| Facility operations staff         | 582                | 582                | 582                | 628                    | <b>618</b>        | 628                 | 640                 |
| Non-school based certificated     | 159                | 172                | 172                | 178                    | <b>176</b>        | 179                 | 182                 |
|                                   | <b>9,245</b>       | <b>9,444</b>       | <b>9,652</b>       | <b>9,971</b>           | <b>10,050</b>     | <b>10,023</b>       | <b>10,190</b>       |

## Students per FTE

### School-based staff



**Non school-based staff**



## Tax revenue

The CBE receives over 93 per cent of its revenue via grants from the Government of Alberta. The Government, in turn, generates revenue from many sources including personal and corporate income tax, property tax from municipal districts resource revenue and federal transfers.

As an example, the following table shows total City of Calgary property taxes revenues (residential and non-residential) for 2012 – 2018.

Data from City of Calgary on property taxes  
in \$ thousands

| Actuals   |           |           |           | Budget    |           |           |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 2012      | 2013      | 2014      | 2015      | 2016      | 2017      | 2018      |
| 1,161,100 | 1,300,300 | 1,376,000 | 1,546,000 | 1,659,000 | 1,820,000 | 1,983,000 |

Sources: City of Calgary Action Plan 2015 - 2018 and 2015 Year End Report

The Provincial Government sets the mill rates for the education portion of property tax collected in Alberta. Education property tax rates will be frozen for 2017-18. The residential/farmland rate will remain at \$2.48 per \$1,000 of equalized assessment and the non-residential rate will remain at \$3.64.<sup>4</sup>

Property assessment is performed at the Municipal Government level. The City of Calgary conducts assessments each year that reflect the market value for the property or the typical net annual rental rate for businesses as at July 1 of the previous year, as provisioned by the Municipal Government Act.

## Debt obligations

The CBE has entered into three types of debt obligations (line of credit, provincially supported debt and capital leases) which incur interest charges on outstanding balances. The CBE is permitted to borrow up to whatever limit the Minister of Education approves for long-term debt.

The CBE is not anticipating an increase in 2017-18 debt levels or changes to the existing debt structure.

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<sup>4</sup> Alberta Budget 2017: Working to make life better

## Organizational risks and opportunities

As part of the budget development process, organizational risks have been identified where there are circumstances that may result in financial pressures that cannot be completely estimated at this time. These include:

- Declining enrolment growth

With ever increasing costs and no related increases to per-student funding, there is a risk that funding will be insufficient to support existing levels of programming, services and supports and changes will impact student learning. To date the CBE has managed to largely maintain the integrity of programming and services because we have had enrolment growth which attracts additional dollars. When funding rates do not keep up with the rate of cost increases, there is an increased risk that those programs and services will be impacted.

New school construction continues to add fixed operating costs that are in excess of base funding rates. There is no specific funding for inflationary cost pressures. This budget is balanced significantly on one-time reduction strategies, so the CBE will need to find efficiencies or cost reductions of at least \$35 million, or 2.5 per cent of our budget. The CBE will begin the process of considering strategies to address this challenge with as little impact to students as possible.

- Non school-based supports not keeping up with enrolment growth

The CBE has experienced significant enrolment growth over the last five years and growth is anticipated to continue, albeit at a slightly lower rate. The CBE has focused its resources on increasing school-based staffing levels to keep pace with enrolment growth but has not been able to increase support of non-school based staff such as psychologists and behaviour analysts at the same rate.

With increasing student complexity and diversity, including issues of mental health, the demand for these types of supports continues to increase while the resources remain static.

- Inflation

Collective agreements with all non-ATA unions have a wage re-opener clause for the period from Aug. 31, 2016 to Aug. 31, 2017. This wage re-opener discussion is contingent upon the ratification of the Alberta Teachers' Association (ATA) agreement. The results of the ATA agreement will set the expectation for the remaining unions' agreements. As a result there are number of risks. One is that future settlements may exceed available funding, putting core programming and services under pressure. The second risk is that an inability to reach a negotiated settlement as a result of labour action may impact CBE operations. The third risk is that any wage increase for locally bargained agreements is the responsibility of the CBE to cover within its existing funding from the Provincial Government. As salaries and benefits make up approximately 77 per cent of our total expenditures these combined risks can have a significant impact on our budget.

To mitigate this risk the CBE has an experienced and competent labour negotiation team and maintains effective working relationships with all associations and unions. For other costs hedging strategies will be deployed to assist in managing cost variability. For example, we use a hedging strategy to help manage down the cost of utilities and to ensure a level of cost certainty.

- Systemic health – technology, infrastructure, volume, etc.

To operate effectively and efficiently the CBE must continue to invest in its core systems, processes and infrastructure. Due to scarce financial resources over the last few years there is an increased risk that core infrastructure, systems and processes will fail, either completely or in part. Similarly, there is an increased risk that our technology infrastructure will not be able to accommodate the rapid enrolment growth forecasted and the continued evolution of technology within the learning environment.

This risk is mitigated to an extent by careful assessment of the most critical investments necessary to maintain operations and student success. To the extent resources are available they are allocated to those critical systems, infrastructure and processes.

- Elimination of budget conservatism

This budget has eliminated known “conservatism” in estimates and projections. In some cases more aggressive assumptions were made in order to minimize, to the extent possible, budget variability. An example of this is the amount of staffing turnover anticipated in the calculation of average salary costs. Estimates will invariably vary from actual results.

As a result of our focus on eliminating “conservatism” there is an increased risk of an overall negative variance between the budget plan and actual results at the end of 2017-18. That means there is an increased risk that the CBE will end the year with an unfunded deficit. Specific areas of concern include the cost of utilities, wages, insurance premiums and uninsured losses as well as the impact from the devaluation of the Canadian dollar. Should this occur the CBE would develop a deficit repayment plan with the Province.

- Mid-year Provincial Government budget announcements

The CBE is economically reliant on the grants we receive from Alberta Education. The Provincial Government’s budget year is April 1 to March 31 each year. This does not coincide with the CBE’s budget year, September 1 to August 31.

The Provincial Government continues to be in a financially challenging environment and there exists a risk that our funding could be reduced in April of next year when the Provincial Government starts a new budget year. It is difficult to quickly respond to any significant changes in funding given the size of our system and our on-going commitments to staff and suppliers once the school year is underway. That said, the current Provincial Government has consistently demonstrated its commitment to public education by providing stable and predictable funding.

- Long-term transportation strategy and the impact of Bill 1: An Act to Reduce School Fees

Through the proclamation of Bill 1, An Act to Reduce School Fees, the Government is making life more affordable for Alberta families. The bill will reduce or eliminate transportation fees for students who live 2.4 kilometres or more away from their designated school. Fees will still be incurred if parents choose to enrol their child in a school other than their designated school, or a student resides between 1.6/1.8 to 2.4 kilometres from their designated school.

This year we have continued to advance our long-term transportation strategy. In order for this strategy to be financially sustainable and support the changes required because of Bill 1, we are aligning school bell times at the majority of our schools. This allows transportation service levels to be close to what we provided in 2016-17 for the majority of the 38,000 students we transport while eliminating the transportation subsidy from the global budget.

Parents and students may make different program decisions from what is anticipated. If student enrolment shifts significantly between schools and programs, this would pose challenges for staffing, transportation and school scheduling come the fall. At this time it is difficult to assess the direction and/or magnitude of any potential shifts.

- Use of reserves to balance

This budget forecasts that we will have limited reserves, which limits our ability to respond to unforeseen events. The use of reserves to cover regular, on-going operations is a one-year, temporary solution. Going forward, the CBE will continue to be challenged with maintaining service levels, managing increasing costs and accommodating system growth with flat funding rates (see funding per student graph). The CBE will engage with our public and our staff to understand how this can be done with as little impact to students as possible.

## Looking forward

Maximizing the dollars directed to the classroom and supporting student results remains our top priority. Our choices continue to be guided and informed by our values: students come first, learning is our central purpose, and public education serves the common good.

The Provincial budget announced in March, 2017 made it possible for the CBE to prepare a budget that supports the stability we need as we educate over 121,200 students in 2017-18, reduce fees in order to make life more affordable for families, open four new schools as well as plan for the opening of several more in 2018-19 and beyond. As 2017 unfolds the Province of Alberta is still facing a challenging economic environment. We will continue to review our programs and operations and make changes where necessary in order to maximize efficiency.

The CBE has presented its 2017-18 budget with projections for 2018 through to 2021. Although the Provincial Government has provided estimates of funding to Education in the upcoming years, there continue to be many unknown factors which make it difficult to prepare balanced projected budgets. Unknowns include union settlements, impact of the impending School Fees Regulation and potential Provincial Government grant rate changes. As a result, the gaps between revenue and expenses in the forecast years simply reflect the magnitude of the decisions needed to balance the budget in those years.

The budget presented for 2017-18 is balanced with the use of reserves and one-time spending reductions, meaning that the CBE is using one-time strategies to balance the budget. This is a structural deficit and unless measures are taken to reduce ongoing spending, we will start the 2018-19 budget balancing exercise with a similar or larger deficit. The CBE, working with students, parents, stakeholders, and Alberta Education, will continue to provide the best public education programs and supports possible within the financial resources made available to us.

cbe.ab.ca



## II. Organizational

The Organizational section provides information about the organizational structure of the Calgary Board of Education, information of its mission, values and goals as well as details of the budget preparation process.

## Goals, objectives and contributions

The Calgary Board of Education (CBE) is the public school board in Calgary, Alberta, Canada. Recognized as the largest school district in western Canada, the CBE provides a full range of educational services for all instructional programs from ECS (pre-kindergarten and kindergarten) – Grade 12 as well as continuing adult learning. Primary funding is provided by the Province of Alberta through the Alberta Ministry of Education. The CBE addresses the complexity and diversity of over 121,200 students through 247 schools with 10,050 permanent, full-time equivalent (FTE) positions and an operating budget of \$1,379.5 million.

The CBE is an independent legal entity with a publically elected Board of Trustees as stipulated in the [School Act](#), Revised Statutes of Alberta 2000, Chapter S-3, and operates as “School Corporation No. 19”. The CBE is registered as a charitable organization under the Income Tax Act (Canada).

## Mission

The Board of Trustees sets as its Mission that **“each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.”** We therefore know that we must consider each individual student and his or her learning requirements while balancing all student needs against the resources available across the organization.

## Values

Administration’s approach to the budget is guided by our values:

- Students come first
- Learning is our central purpose
- Public education serves the common good

We will work to optimize student learning while recognizing the reality of our fiscal constraints.

We do our work in alignment with Alberta Education. With the announcement of the [2017 Alberta budget](#), the Government reaffirms its commitment to public education by continuing to fund enrolment growth and maintaining funding rates at 2015-16 levels. The Calgary Board of Education fully supports the Government’s commitment to public education.

The [2017 Alberta budget](#) includes money that comes in (revenue) and money that goes out (expenses). The Alberta Government’s annual budget typically covers a year from April through to the following March. The Government gets money from personal and corporate taxes, resource revenue like oil and natural gas royalties, transfers from the federal Government, income from investments and revenue from other taxes and fees on specific products and services and borrowing. Expenses include all of the programs and services the Government provides for Albertans, from funding to support people with disabilities to running hospitals. It also includes staffing costs for people to provide these services. Each budget year presents a different challenge for the Government, depending on many factors.

## Factors influencing our budget

We are also guided by CBE's [Three-Year Education Plan](#). The Three-Year Education Plan is formalized each year as required by Alberta Education to support accountability and transparency throughout the Provincial kindergarten – Grade 12 education system and to ensure alignment of school authorities and schools with Provincial direction. The CBE's Three-Year Education Plan focuses on personalized learning, building our professional capital, engaging our stakeholders and stewarding our resources. Taken together, we believe these strategies allow us to optimize student success.

Our budget is focused on the priorities which are developed following direction from Alberta Education, the Three-Year Education Plan and the CBE's Results.

We continue to optimize student success by improving the quality of teaching and learning in the classroom by focusing on notable priorities:

- Personalizing learning
- Advancing leadership practices
- Implementing kindergarten – Grade 12 mathematics and literacy strategies
- Implementing the High School Success strategy
- Improving results for First Nations, Métis and Inuit students

We will create conditions for success and have a positive impact on the learning outcomes of students by:

- Building, maintaining and modernizing schools to foster enriching learning environments for all students. (Four schools opening in 2017-18 and three under development for a total capital cost of \$210 million. The Government has announced an additional three new schools and one major modernization scheduled for completion in 2021).
- Developing and implementing a replacement Student Information System that provides greater access to and use of student profile data for students, families, teachers and leaders, supports best practices in assessment and grading and creates administrative efficiencies (total estimated capital cost of \$17.7 million).
- Continuing to use our community engagement framework ([dialogue](#) framework) to guide decision making and to ensure stakeholders are reasonably included in decisions that affect them (annual cost of \$1.1 million including staff costs).
- Undertaking a comprehensive system-wide staff engagement survey to allow us to continue to provide an engaging work environment for our staff (estimated cost of \$0.5 million).

## Community engagement

[Community engagement](#) provides perspectives that help us make the best decisions on behalf of our students. In developing the budget we recognize that public education is a shared responsibility. With our students, families, employees, communities and the Government of Alberta in mind, we make decisions in the best interest of students and their learning. Those decisions inform our budget process.

## Guiding Documents

- [Alberta Education Business Plan 2017-20](#) – Alberta Education's business plan provides an overview of the outcomes for the ministry and the key strategies to be completed to achieve those outcomes.
- [CBE Three-Year Education Plan](#) – The plan that guides our work and connects each CBE employee to our Mission, our Values and our Outcome: Student Success. We focus on four strategies: personalize learning; build our capacity; engage our stakeholders; and steward our resources.

- [CBE Governance Policies](#) – Policies enable the Board of Trustees to effectively lead, direct, inspire and control the outcomes and operations of the district. The Board of Trustees governance policies are grouped into four categories, each serving a distinct purpose. The four categories are:
  - Governance Culture: these policies define the Board of Trustees' own work and how it will be carried out. They clearly state the expectations the Board has for individual and collective behavior.
  - Board/Chief Superintendent Relationship: the Board has defined in policy how authority is delegated to the Chief Superintendent and how the Chief Superintendent's performance will be evaluated.
  - Operational Expectations: these policies (known as OEs) define both the non-negotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.
  - Results: these are the Board of Trustees' statements of outcomes for each student in our district. The Results policies become the Chief Superintendent's and the organization's performance targets and form the basis for judging organization and Chief Superintendent performance.
  
- [CBE Results](#) – The Board of Trustees has set clear direction for student success. We are all committed to achieving these Results:
  - Academic success – Each student will be literate and numerate, able to integrate and apply the knowledge, skills, attitudes and competencies acquired across all academic disciplines.
  - Citizenship – Each student will be a responsible citizen.
  - Personal development – Each student will identify and actively develop individual gifts, talents and interests.
  - Character – Each student will demonstrate good character.
  
- [Alberta Budget 2017: Making life more affordable](#) – The Alberta Government's fiscal plan for 2017 including new legislation on school fees and transportation services. The plan reduces school fees for parents with children in the ECS - Grade 12 education system, including fees for instructional supplies or materials and transportation. Budget 2017 will provide Albertans with \$8.2 billion in funding for the ECS - Grade 12 education system including \$500 million for new schools, replacements and modernizations and \$213 million to fund enrolment growth and grants for First Nations students, English Language Learners and others with diverse learning needs. Government has provided an additional \$54 million to offset the loss of school fee revenue to ensure school boards maintain education programming for students.

This Provincial direction, translated through our values, help us support success for each student every day.

**Governance**

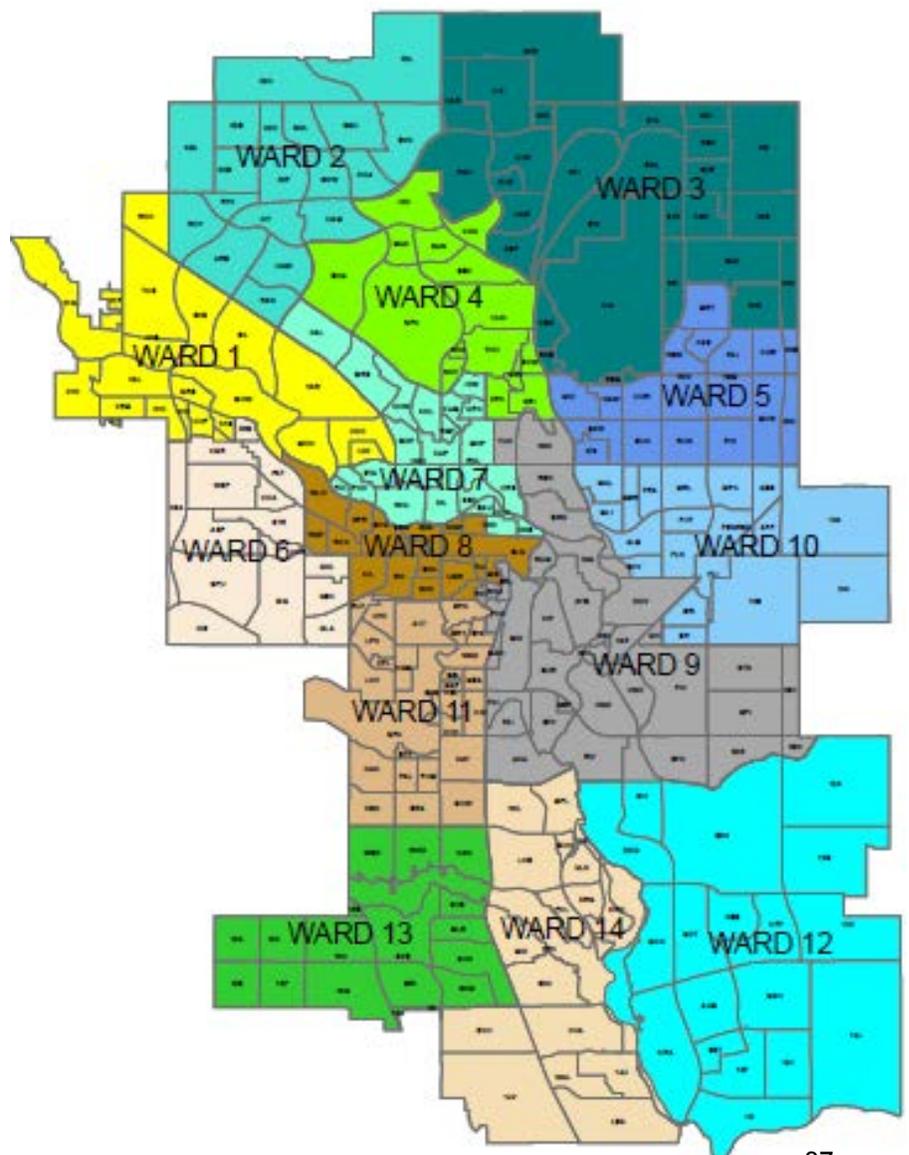
The CBE is guided by a publically elected board of seven trustees. Trustees are elected every four years in alignment with municipal elections for Calgary's mayor and councillors. The Board of Trustees provides direction to the Chief Superintendent of Schools (Chief Superintendent) via its policies and procedures as evidenced by board motions. To pass a motion requires the support of a majority of the seven trustees. In the event of a tie vote, the related motion fails.

The Board of Trustees is responsible for the appointment of the Chief Superintendent of Schools. Under the Board's governance framework operations are delegated to the Chief Superintendent. The Chief Superintendent then hires a team of superintendents, staff and other supports to lead and manage operations.

Day-to-day operations are led by this team of superintendents, who are responsible for meeting the expectations of the Board of Trustees as set out in the Board's Results policies and Operational Expectations through their respective service units. The Deputy Chief Superintendent has operational responsibility for the CBE's 247 schools through seven Area offices.

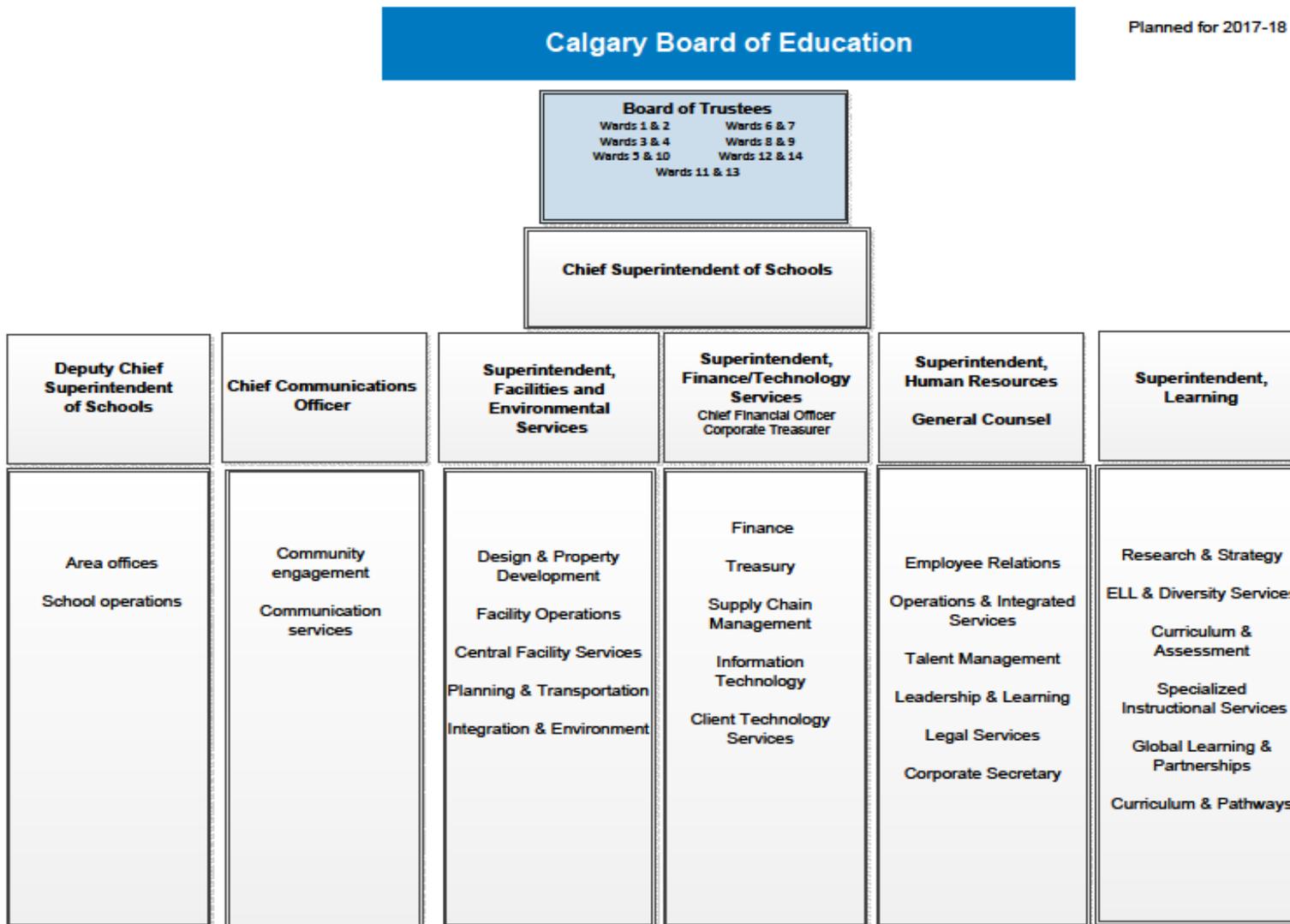
Board members represent two wards each within the City of Calgary. The next municipal election is scheduled for the fall of 2017.

| <b>Board of Trustees</b>                  |
|---|
| Joy Bowen-Eyre (chair)<br>Wards 1 & 2     |
| Trina Hurdman (vice-chair)<br>Wards 6 & 7 |
| Lynn Ferguson<br>Wards 3 & 4              |
| Pamela King<br>Wards 5 & 10               |
| Judy Hehr<br>Wards 8 & 9                  |
| Julie Hrdlicka<br>Wards 11 & 13           |
| Amber Stewart<br>Wards 12 & 14            |



**Organizational structure**

The following is the organizational structure of the CBE.



The CBE is organized so that school-based leaders (principals and assistant principals) can devote the maximum amount of time to instructional leadership. This means that many services and supports that directly impact staff and students are provided through supporting service units. Doing this creates efficiency in services provided and significantly reduces the administrative burden placed on school-based leaders.

Examples of this approach include the provision of specialized learning supports and services for students (psychology, language and curriculum support) where and when required. These services are provided through our Learning service unit. Similarly, facilities operations, staff recruitment practices, information technology, infrastructure development and maintenance and a host of other supports are provided through our supporting service units.

Resources are deployed based on needs and priorities rather than an equal distribution. This model reduces the burden on school-based staff. Services and supports are available when and where needed balanced against resource availability.

### **Schools and Area Offices**

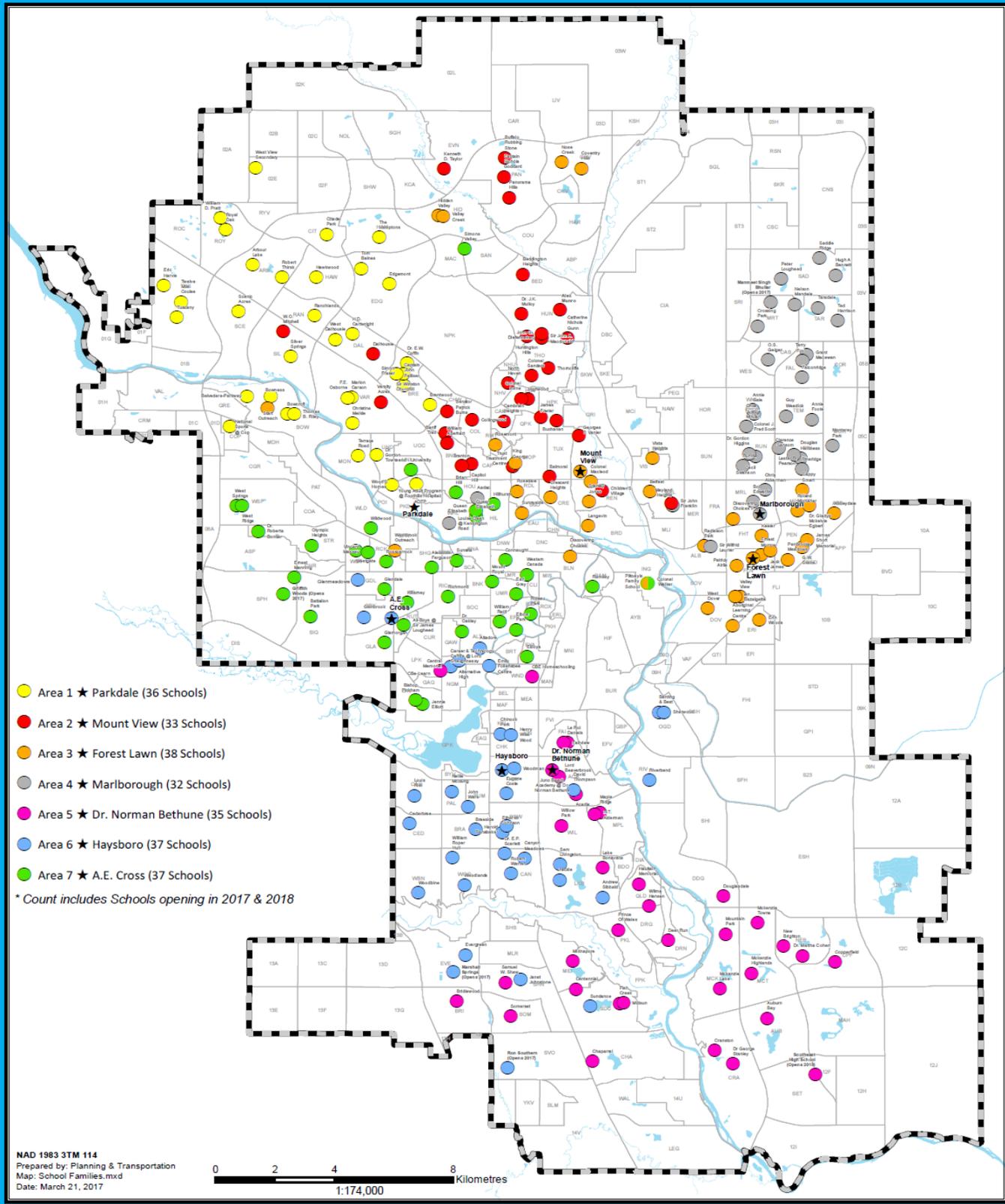
To manage the needs of our large school system and efficiently support our schools, we have divided our school district into areas within the boundaries of the City of Calgary. Each Area is led by an area director who provides leadership support to principals in approximately 35 schools. The Area offices deliver system services to its schools, support principals in school operations and ensure effective collaboration amongst schools.

Each school is led by a principal who is responsible for meeting the learning needs of each student. Resources are allocated to each school via the RAM, a methodology for allocating funds with the objective of ensuring that resources are allocated equitably (rather than equally) in support of student learning. That is, different funding levels may be required to support students in their learning. Principals make staffing and deployment decisions using those funds because it is the CBE's belief that school principals, in consultation of their communities, are best positioned to make school-based spending decisions.

The following is a map of the Areas:

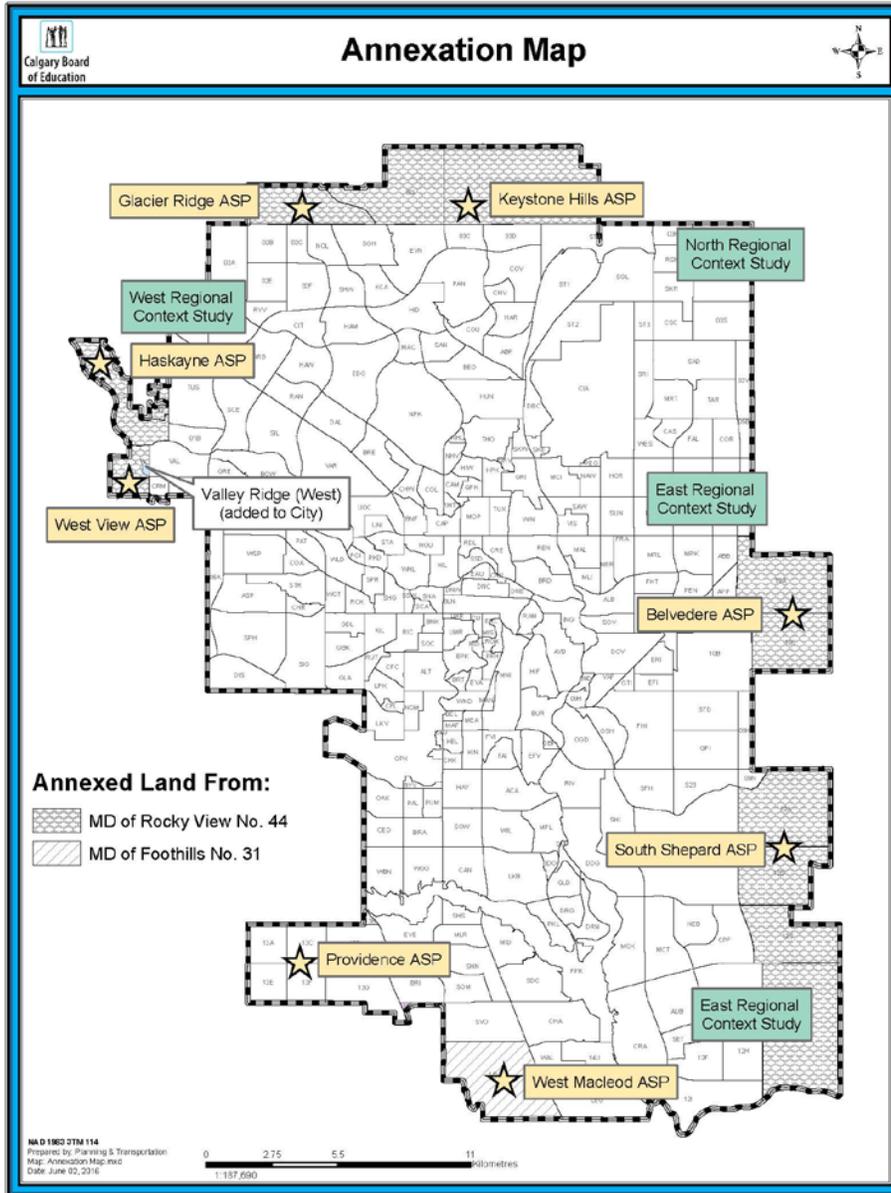


# School Families



**Area served**

The CBE serves students in the City of Calgary. While the boundaries of the City of Calgary are growing, the Minister of Education has identified that it is in the best interest of students to retain the existing school boundaries until urban development warrants change. Annexed lands will be brought into the CBE and Calgary Catholic School District (CCSD) inventory as area structure plans are finalized.



## Budget process

The preparation of the annual budget is led by Superintendents' Team and with oversight from the Board of Trustees, who provide direction, guidance and ultimate approval.

Budget work begins in January with the internal work of projecting the costs required for the next fiscal year when factoring in:

- enrolment and student complexity changes
- wage changes and grid movement
- opening / closing of schools
- impacts from contractual commitments
- impacts from anticipated rate changes
- other non-discretionary budget implications

This establishes our initial planning budget that would be required to maintain 2016-17 service levels in the next school year. Superintendents' Team establishes the solution requirements or decision criteria needed to inform budget decisions.

January also sees the beginning of planning for community engagement. In February and March the Calgary Board of Education invited staff, union representatives, parents, students and members of the public to provide their comments on budget priorities for the 2017-18 school year and beyond.

The diverse feedback received is an important part of meeting the needs of the community we serve. The perspectives articulated are considered as budget decisions are made for this budget cycle and going forward. [Budget feedback](#) continues to be gathered and analysed year round.

The Province of Alberta typically announces its annual budget in late February or early March. Included in this budget are the funding rates and formulas to fund school districts for the upcoming year. At this point in time our enrolment, anticipated expenses and revenue calculations are finalized. Available funding is matched against total anticipated spending. Final budget balancing activities then occur to ensure resources are aligned to support students in the best way and to make progress on high priority strategies and actions.

Typically this timeline would allow the time required to prepare and deliver the Budget Assumptions Report to the Board of Trustees, provide schools their budget by early April to accommodate the spring staffing process and deliver the final budget to the Board of Trustees for approval by the May 31 deadline (extended to June 30 for 2017-18).

This year the Provincial Government released its 2017 budget on March 16, 2017. The CBE provided schools with their budget allocation to support their operational requirements prior to the delivery of the Budget Assumptions Report. This decision is made in conjunction with the Board of Trustees. This provided schools with adequate time to plan for staffing of new schools as well as movement of existing staff.

School and service unit leaders determined their staffing complement for the 2017-18 school year based on their budget allocation and operational need. Human Resources supported leaders in the process of identifying teachers for surplus and support staff for transfer/layoff. Talent Management will now begin the process of offering employees requiring placement new positions or positions left vacant by employee retirements and resignations. After all surplussed teachers are offered placement, the remaining positions will be posted allowing teachers interested in movement an opportunity to apply.

A range of inputs including operational requirements and [information gathered from community budget engagement](#) are incorporated in the development of the budget. Other activities during budget development include the scrutiny of existing budget resources and consideration of alternative practices.

The [Budget Assumptions Report](#) was presented to the Board of Trustees for information purposes on April 11, 2017. This report discloses the budget planning assumptions as required under Operational Expectation 5: Financial Planning. There were no board motions arising from the presentation of this report. The full report is included in the Informational section of this budget report.<sup>5</sup>

Based on the budget assumptions established, this final budget was developed by Superintendents' Team, with direction from established decision making criteria, Alberta Education direction, our mission, values and Three-Year Education plan. The report was prepared and will be presented to the Board of Trustees on June 13, 2017 for review and on June 20, 2017 for approval. There are **no significant deviations** from the assumptions included in the budget assumptions presented to the Board of Trustees.

## Capital budget process

The capital budget preparation is a subset of the larger budget process with oversight from the Capital Budget Council. This council is comprised of representatives from across the organization: superintendents, directors and principals. The council is responsible for reviewing and making recommendations with respect to the CBE's capital budget. They review all requests for capital budget dollars and make recommendations to Superintendents' team for approval based on the CBE's priorities and linkage with the Three-Year Education Plan.

The building and modernizing of new schools and other major facility projects is outside the scope of the CBE's capital budgeting process. The Province has responsibility for the building and modernization of new and existing schools. Each year the CBE prepares a Three-Year School Capital Plan for submission to the Provincial Government which is an analysis of the CBE's forecasted school capital needs. We also prepare and submit to the Provincial Government an annual Modular Classroom Plan, which is an analysis of the CBE's forecasted modular classroom needs. The implementation of any of these plans is dependent upon Provincial approval.

## Alberta Education budget submission

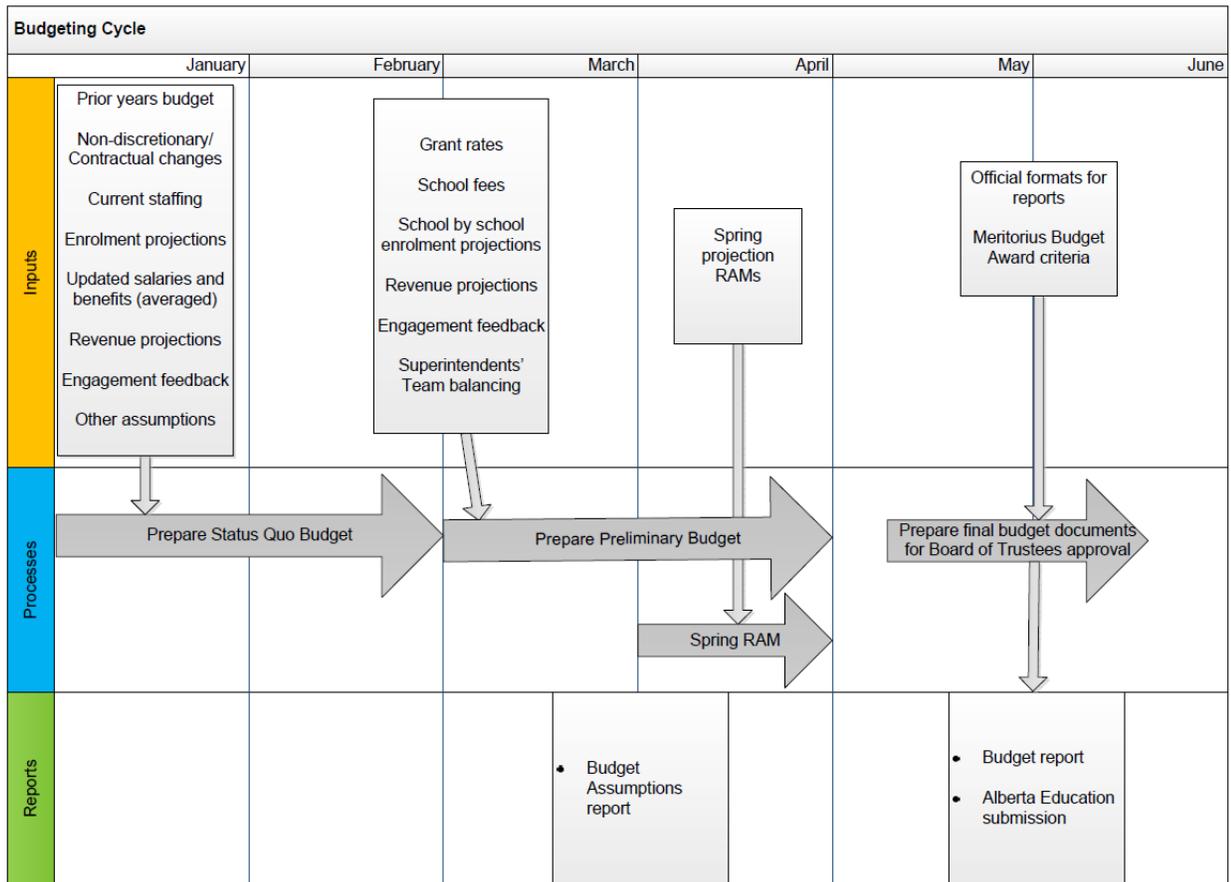
Alberta Education requires that their [Budget Report template \(BR\)](#) is completed, approved by the Board of Trustees and submitted by May 31 (June 30 for 2017-18). For each annual budget, Alberta Education issues the [BR Guidelines](#) to school jurisdictions, which provides requirement details for budget preparation, classification of items and disclosure.

The Alberta Education Budget Report for the Calgary Board of Education is included in the Informational Section of this report.

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<sup>5</sup> The Budget Assumptions Report was presented to the Board of Trustees on April 11, 2017 and has been reproduced as part of this budget report in the Informational section.

**Budget process timeline**



## Basis of accounting

The CBE reports its [annual financial statements](#) in accordance with Canadian Public Sector Accounting Standards. These standards require that year-end financial statements present a comparison of the actual results against those originally planned (i.e. the budget).

This budget has been prepared using our best estimate of September 2017 enrolment and in a manner consistent with how our actual financial activity will be recorded and presented.

## Account information

The CBE's classification and use of accounts is regulated by the reporting requirements of Alberta Education. Revenues are grouped by source and expenditures are categorized by both object and program (sometimes referred to as 'block'). The main revenue and expense categories include:

### Revenues:

|                                      |   |
|--------------------------------------|---|
| Alberta Education                    | All revenues sourced from Alberta Education. Also included are payments made by Alberta Education to the Alberta Teachers' Retirement Fund on behalf of the CBE as well as revenues recognized for facility-related capital funding from Alberta Education. |
| Other - Government of Alberta        | All revenues sourced from other Ministries of the Government of Alberta.  |
| Federal Government and First Nations | All revenue received from the Federal Government including payments related to tuition fees for First Nations, Métis and Inuit students.  |
| Other sales and services             | Adult, international student and continuing education fees as well as revenues from the provision of sales and services.  |
| Fees                                 | Fees charged to parents for transportation, noon supervision as well as other fees charged directly by schools.   |
| Investment income                    | Interest, dividends and realized gains on the sale of investments.  |
| All other revenue                    | Gifts and donations, fundraising and rental of facilities.  |

### Expenditures by object:

|  |  |
|--|--|
| Salaries and benefits                                  | All salaries paid to employees and all benefits paid on behalf of employees including contributions to pension plans; employment insurance, Workers Compensation Board and Canada Pension Plan premiums; as well as the cost for extended health and dental benefit plans. |
| Services, contracts and supplies                       | Cost of supplies, materials and services rendered.   |
| Other (amortization, interest, uncollectible accounts) | Amortization of tangible capital assets, interest and financing charges and uncollectible accounts (bad debts) expense.  |

**Expenditures by program/block:**

|                                       |  |
|---------------------------------------|--|
| Instruction: Early Childhood Services | Instruction (Early Childhood Services) is comprised of both the delivery of early childhood instruction in schools as well as school administration and support provided for early childhood instruction centrally. This includes pre-kindergarten and kindergarten. |
| Instruction: Grades 1 – 12            | Instruction (Grades 1 – 12) is comprised of both the delivery of Grades 1 – 12 instruction in schools as well as school administration and centrally-provided support for the delivery of Grades 1 – 12 instruction.   |
| Board & System Administration         | Administration includes system-wide activities for the purpose of general regulation and direction of the affairs of the school jurisdiction.  |
| Transportation                        | The CBE is responsible for transporting students to and from school sites. All direct activities related to transporting students and the support to run the program is included in Transportation.  |
| Plant Operations and Maintenance      | Activities related to the construction, operation, maintenance, safety and security of school buildings and support provided to administer these activities are included as plant, operations and maintenance.   |
| External Services                     | External services include services offered outside the CBE's regular educational programs for kindergarten – Grade 12 students such as continuing adult education and the noon supervision program.  |

**Reserves**

Reserves include certain amounts of accumulated surplus (where revenues for the year exceeds spending for that same period) that are internally or externally restricted for future operating or capital purposes. Transfers to and from reserves are recorded when approved by the Board of Trustees. Use of capital reserves are restricted to capital purposes and may only be used for operating purposes with approval by the Minister of Education.

## Factors affecting the budget

Over the past two years the CBE has benefited from the current Provincial support and commitment to public education. With over 93 per cent of our funding coming from the Province, even a small change in funding rates or funding methodologies impacts all our students, parents, teachers, and support staff.

The level of funding the CBE will receive in 2017-18, while an increase over 2016-17 primarily due to enrolment growth, will not be sufficient to maintain services at levels similar to those provided in the 2016-17 school year. As we head into the 2017-18 school year we have made value-based choices to balance our budget. Our goal is always to minimize the direct impact on students and their learning.

Overall, funding from Alberta Education will increase by \$43.7 million from 2016-17 or 3.6 per cent in the following categories:

- \$18.5 million increase in grants that are derived from enrolment growth and available to fund all operations.
- \$18.3 million for the fee replacement grant (Bill 1).
- \$6.1 million for revenues to be recorded as an offset to facility-related amortization costs.
- \$0.8 million net increase for transportation, teacher pension costs and infrastructure, maintenance and renewal funding.

Our costs are increasing. Funding is not provided directly for increased costs. These include, but are not limited to:

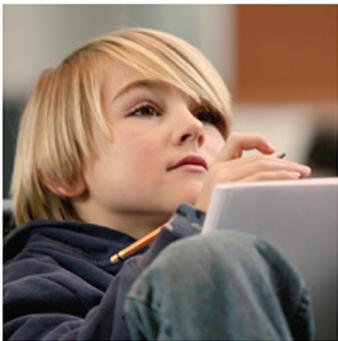
- Costs related to new schools opening;
- Grid movement for all employees; and
- Inflation and foreign exchange pressures.

In addition to increasing costs, a significant portion of CBE expenses are non-discretionary. A non-discretionary cost is where the CBE has little or no direct control in the short term and which is necessary to maintain programming, services and supports. Non-discretionary costs include amortization, insurance premiums, utility expenses, technology licencing fees, etc. This creates a challenge as it limits available cost reduction options.

This budget also eliminates known “conservatism” in estimates and projections. As a result, actual costs may, at the end of the school year, be higher than assumed in this budget. Specific areas of concern include the cost of utilities, wages, insurance premiums and uninsured losses. There is an increased risk that the CBE will end 2017-18 with actual expenses greater than planned. We believe this risk is acceptable as it allows the CBE to maximize the resources available to support student success.

Finally, administration must deliver a balanced budget and this plan does that.

cbe.ab.ca



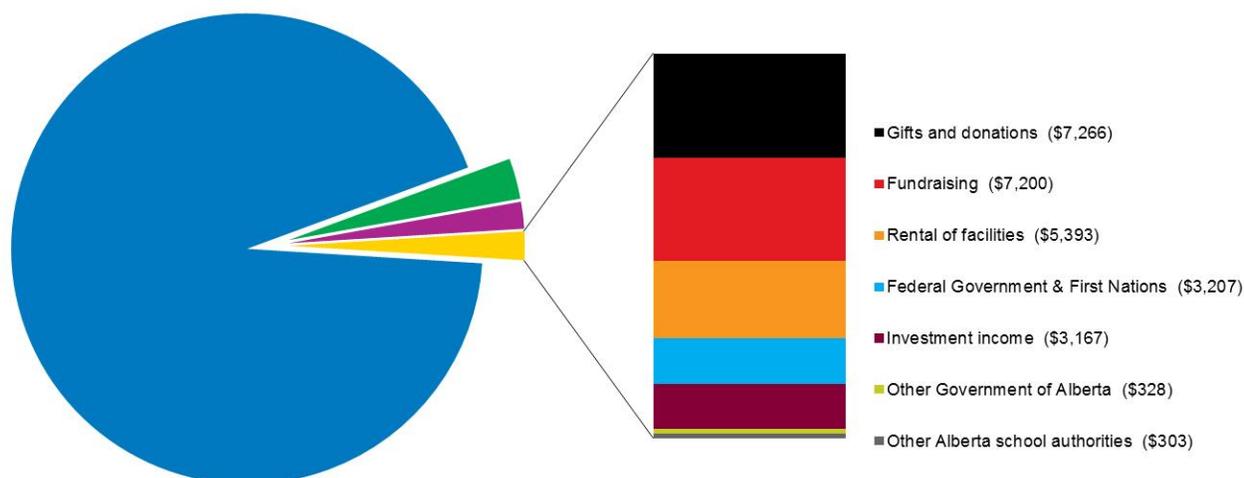
## III. Financial

The Financial section provides more specific details on the financial components of the budget including definitions of the various revenue and expense categories, capital spending, debt obligations as well as assumptions used in the determination of future year forecasts.

## Revenue

### Revenue review

|                          | Budget<br>2017-18 |             | Fall Budget<br>2016-17 |
|--------------------------|-------------------|-------------|------------------------|
|                          | (in \$ thousands) | %           | (in \$ thousands)      |
| Alberta Education        | 1,274,436         | 93%         | 1,230,690              |
| Fees                     | 38,094            | 3%          | 51,456                 |
| Other                    | 26,864            | 2%          | 29,466                 |
| Other sales and services | 25,144            | 2%          | 19,360                 |
| <b>Revenues</b>          | <b>1,364,538</b>  | <b>100%</b> | <b>1,330,972</b>       |



- Alberta Education** – includes grants received based on projected September 30 enrolment. Alberta Education has maintained funding rates at 2015-16 levels with the exception of changes to the funding rate for Credit Enrolment Units (CEUs), which is anticipated to have minimal impact on the CBE, and a change to the Small Schools by Necessity funding, which is not applicable to the CBE.
- Fees** – school fees collected for the transportation of students who do not qualify for fee-free transportation, the supervision of students who stay at school for lunch, field trips, and additional programming such as alternative program fees and fees for optional courses.
  - All revenue from Alberta Education related to transportation and ISM will be fully applied to the cost of these services. There will be no contribution from the global budget to support fee-based programs and services. Fee revenue for transportation and noon supervision will fully fund the gap between Alberta Education funding, if any, (for example, transportation) and direct program costs, including waivers and uncollectable accounts.
  - As a result of Bill 1: An Act to Reduce School Fees, fee revenue for 2017-18 will decline as fewer parents pay fees. ISM fees have been eliminated for those items that are included under the Government’s working definition for Instructional supplies or materials as well as the transportation fees for students who qualify for fee-free or fee-reduced transportation service.
  - Currently there is no Provincial funding for the Grade 1 – 6 noon supervision program. This program is solely funded by school fees. Approximately 50,900 Grade 1 – 6 students are registered and supervised through the noon hour program in CBE schools (April 2017 estimate). For the 2017-18 year noon supervision fees will be maintained (subject to ministerial approval) and service levels adjusted due to increased labour costs.

**CALGARY BOARD OF EDUCATION  
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- **Other** – includes donations received, fundraising at schools, investment income and revenues from the rental of facilities.
- **Other sales and services** – revenue collected from international students attending CBE schools, instruction fees paid by adult learners, and general sales revenue from cafeteria sales and the provision of services by students in programs like cosmetology and automotive.

**Revenue changes from prior year budget**

|                                      | <b>Fall<br/>Budget<br/>2016-17</b> | Enrolment | Non<br>discretionary<br>increases | Reduced<br>allocations to<br>schools | Transportation | New fee<br>replacement<br>grant | <b>Budget<br/>2017-18</b> |
|--------------------------------------|------------------------------------|-----------|-----------------------------------|--------------------------------------|----------------|---------------------------------|---------------------------|
| <b>(in \$ thousands)</b>             |                                    |           |                                   |                                      |                |                                 |                           |
| <b>Revenues</b>                      |                                    |           |                                   |                                      |                |                                 |                           |
| Alberta Education                    | <b>1,230,690</b>                   | 20,738    | 6,050                             |                                      | 6,568          | 10,390                          | <b>1,274,436</b>          |
| Fees                                 | <b>51,456</b>                      | (702)     |                                   |                                      | (2,781)        | (9,879)                         | <b>38,094</b>             |
| Other sales and services             | <b>19,360</b>                      | 5,914     | 51                                | (181)                                |                |                                 | <b>25,144</b>             |
| All other revenue                    | <b>22,853</b>                      | (2,633)   | (58)                              |                                      |                |                                 | <b>20,162</b>             |
| Federal Government and First Nations | <b>2,650</b>                       |           | 557                               |                                      |                |                                 | <b>3,207</b>              |
| Investment income                    | <b>3,345</b>                       | (178)     |                                   |                                      |                |                                 | <b>3,167</b>              |
| Other - Government of Alberta        | <b>618</b>                         | (290)     |                                   |                                      |                |                                 | <b>328</b>                |
| <b>Total</b>                         | <b>1,330,972</b>                   | 22,849    | 6,600                             | (181)                                | 3,787          | 511                             | <b>1,364,538</b>          |

- **Enrolment** - included funding changes from the Province related to enrolment, adjustments to School Generated Funds (SGF) for enrolment and activity level trends.
- **Non-discretionary increases** - includes adjustments related to revenue recognized for offsetting facility amortization expense changes.
- **Transportation** - adjustments for impacts of Bill 1 including a reduction in fee revenue along with additional funding from the Government as well as the implementation of our long term transportation strategy.
- **New fee replacement grant** – includes fee reductions and the fee replacement grant to replace the loss of fee revenue.

## Alberta Education funding

Alberta Education provides funding to school jurisdictions via various grants in accordance with their [funding manual](#). The funding framework referenced in the funding manual is a funding allocation methodology. It is not intended as a guide to spending. Additionally, the funding framework is based on total enrolment rather than any specific student. Consequently, it is impossible to draw inferences to funding available to support a particular student from the information contained in the funding manual.

In 2017-18 grant funding will continue to be based on enrolment and there have been no changes to funding rates with the exception of changes to the funding rate for Credit Enrolment Units (CEUs), which are anticipated to have minimal impact on the CBE.

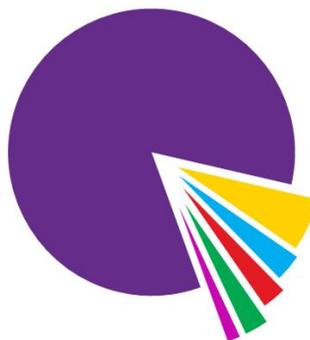
Of the funding received from Alberta Education, 16 per cent is targeted or restricted for specific use (including student transportation, Alberta Teachers Retirement Fund funding, expended deferred capital revenue, Infrastructure, Maintenance and Renewal and the new fee replacement grant). The remaining amount may generally be used at the CBE's discretion to support student learning.

The Provincial Government provides 93 per cent of the CBE's funding. The remaining seven per cent is generated through school fees, adult learning fees, school fundraising activities, rental of facilities and investment income. With the exception of investment income, these other revenue sources are tied directly to spending activities and do not contribute to the delivery of instruction in schools or other school board operations.

Alberta Education funding is virtually the only source of revenue to pay for operating and supporting all aspects of our schools.

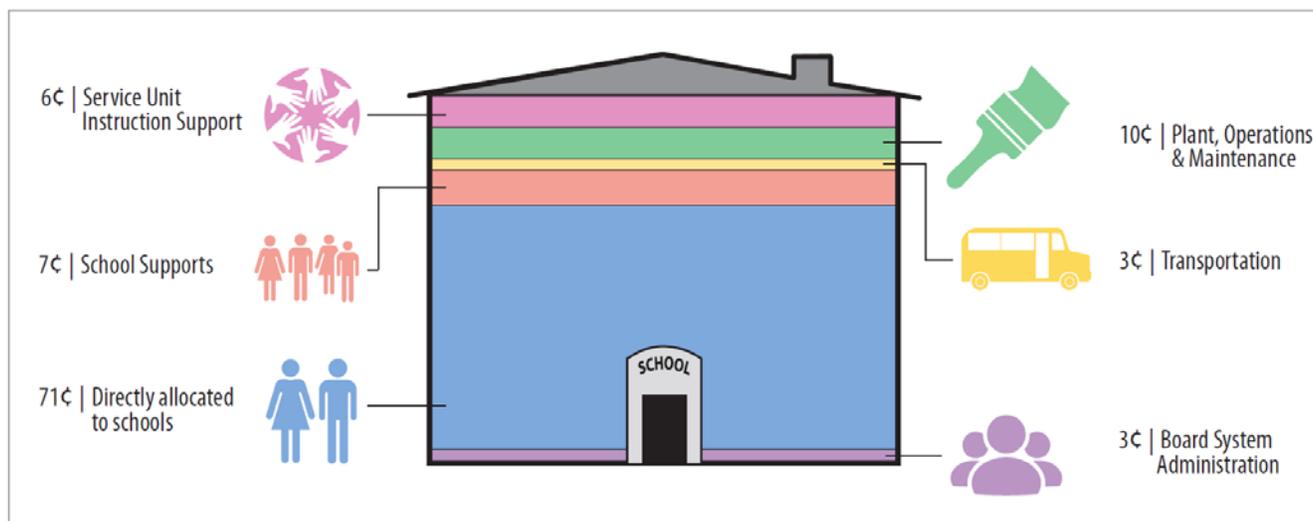
Alberta Education funding by grant type is shown in the table below.

|  | <b>Budget<br/>2017-18</b> | <b>Fall Budget<br/>2016-17</b> | <b>Increase/<br/>(Decrease)</b> |           |
|--|---------------------------|--------------------------------|---------------------------------|-----------|
|  | <b>(in \$ thousands)</b>  |                                | <b>(\$ thousands)</b>           | <b>%</b>  |
| Student funding                        | 1,072,654                 | 1,054,117                      | 18,537                          | 2%        |
| Alberta Teacher Retirement funding     | 76,065                    | 74,757                         | 1,308                           | 2%        |
| Expended deferred capital revenues     | 39,189                    | 33,140                         | 6,049                           | 18%       |
| Student transportation                 | 34,266                    | 34,806                         | (540)                           | (2)%      |
| Infrastructure maintenance and renewal | 34,002                    | 33,870                         | 132                             | 0%        |
| Fee replacement grant                  | 18,260                    | -                              | 18,260                          | 100%      |
| <b>Alberta Education funding</b>       | <b>1,274,436</b>          | <b>1,230,690</b>               | <b>43,746</b>                   | <b>4%</b> |



**Each dollar of Alberta Education funding is seen in or affects schools.**

While the majority of our funding from Alberta Education goes directly to schools, a portion of it is also held centrally. This enables us to give schools the resources they need. For example, each school cannot afford several full-time specialists in different fields, but when specialists are paid for centrally, they can be deployed to schools as needed and shared among schools.



**71 cents of every dollar is spent directly in schools.**

Money is provided to schools via a process we call RAM (Resource Allocation Method). Monies allocated through the RAM fund the learning experience in schools, which includes teacher and staff salaries as well as instructional supplies and materials. These funds enable students to meet learning outcomes. This method is designed to allocate resources equitably while providing principals and schools with choice in the assignment and deployment of those resources to best meet the unique needs of students within their schools. Like the Provincial funding framework, the RAM does not allocate funding to a school for a specific student; rather, the RAM allocation is available to the school principal to deploy to meet the learning needs of all students in their school.

This 71 cents also includes custodial services provided in schools which ensure a clean and healthy learning environment. Six of the 71 cents is for the cost of teacher pensions. This is a contractual obligation over which the CBE has no direct control. Although this cost is not rolled out as part of the RAM, it is an essential cost of teacher compensation and is included in this category as a direct cost of schools.

**The remaining 29 cents directly affect schools.**

Our entire organization supports student learning. Some specific school and instruction supports are administered on behalf of schools rather than directly by schools, as it is more efficient and effective to provide these at a system level rather than to duplicate these at individual schools. Central administration of these services relieves schools and principals of administrative burden and allows them to focus on students and their learning; however, the majority of funds are allocated directly to schools.

[Of these 29 cents, 7 cents goes to support learning in schools by funding student supports.](#)

This includes the many specialized services for students that are available for principals to access including psychologists, braille assistants, deaf and hard of hearing specialists, mental health specialists, occupational and physical therapists, speech language pathologists, cultural diversity advisors and more. Our central supports budget provides for 266 FTEs, which equates to a ratio of one central support staff per 456 students.

These central supports work in various schools supporting learning, which is critical to our teachers as they support more than 21,000 students identified with special education needs and over 26,000 students identified as English Language Learners.

This funding also provides learning supports in Area offices. The Area learning team is the first support to school learning teams as they work to meet student needs.

Area offices ensure that the entire system of schools remains integrated and coordinated so that our students have a seamless learning experience. Our substitute teachers for long and short-term absences are also funded here.

#### 6 cents of every dollar goes to service unit instruction support

This funds the instructional and programming support to teachers and schools that is provided by service units.

Support is offered in areas such as Aboriginal education, curriculum implementation, attendance, suspensions, student records, expulsions, counselling, kindergarten, multicultural services and specialized assessment. Service unit instructional support also includes programs such as school health, school nutrition, off-site and off-campus learning programs, outreach programs, community partnerships, home schooling, online learning and high school success initiatives.

This funding also supports our human resources department with teacher recruitment, enabling us to find the best, most qualified candidates to teach in our classrooms.

#### 10 cents of every dollar goes to plant, operations and maintenance

Schools are safe and secure thanks to funding for plant operations and maintenance. This also funds facility maintenance and repair and provides utilities and insurance for schools. Of the 10 cents, 3 cents represents the Provincial revenue recognized as an offset to amortization expense for Provincially funded facility assets such as new schools, modulars and modernizations.

#### 3 cents of every dollar goes to transportation

Transportation dollars from Alberta Education help fund 38,000 students to get to school each day. This does not include any revenue related to fees or contribution from the global budget.

Other transportation needs are also funded in this category through busing aides, charter services, attendants, LPNs (licensed practitioner nurses), Calgary Transit passes and taxi/Handi-Bus services as needed. The revenue generated through transportation fees is not reflected in this summary.

#### 3 cents of every dollar goes to board and system administration

At 2.7 per cent, board and system administration funds the Board of Trustees and superintendents who provide the overall direction to the system, along with many important services that affect our schools. Examples include accessible technology design for schools, supply chain operations, administration and operation of our website, communications assistance for schools and school councils and the administration of payroll and benefits for all employees.

- Administration expenses includes the administration of the Board of Trustees office and important activities the Trustees conduct in the community.
- The Chief's Office provides administration to the entire CBE. The Chief Superintendent leads all aspects of the organization to ensure student success.

- Human Resources is also funded through board and system administration. The CBE's most important resource is its people, and the human resources department is responsible for recruiting and developing employees. (This piece of funding refers to the recruitment of non-instructional employees. Teacher recruitment is funded through service unit instruction support). This department is also responsible for administration of payroll and benefits.
- Technology Services provides administration of technology design, development and support for the CBE. The CBE's accessible technology is seen in classrooms every day.
- Financial Services improves business services so that schools may focus more of their resources on instruction. They are responsible for the administration of school financial management, corporate planning and reporting, revenue and treasury, performance management and corporate initiatives, supply chain operations and strategic sourcing.
- Legal Services serves administration by providing oversight in the area of risk mitigation for the CBE. This includes services such as coordinating development of the CBE's administrative regulations and procedures and overseeing the CBE's compliance with applicable law, regulations and policies. Schools also have access to a school liaison, who works directly with schools and Area offices to provide ongoing direction and support around legal matters that may arise at a school, as well as service on issues related to student registration, custody, and investigations.
- Communications & Community Engagement Services serves CBE schools and service units in communication with the public. This includes the administration of and creation of [cbe.ab.ca](http://cbe.ab.ca) as well as school websites and services such as the *dialogue* framework, media relations, internal employee communications, crisis communication, school council assistance, event planning, new school build communications and much more.

Non-Alberta Education revenue

|                                    | Budget            | Fall Budget    | Increase/<br>(Decrease) |              |
|------------------------------------|-------------------|----------------|-------------------------|--------------|
|                                    | 2017-18           | 2016-17        | (\$ thousands)          | %            |
|                                    | (in \$ thousands) |                |                         |              |
| Fees                               | 38,094            | 51,456         | (13,362)                | (26)%        |
| Other sales and services           | 25,144            | 19,418         | 5,726                   | 29%          |
| Gifts and donations                | 7,266             | 6,142          | 1,124                   | 18%          |
| Fundraising                        | 7,200             | 9,800          | (2,600)                 | (27)%        |
| Rental of facilities               | 5,393             | 6,281          | (888)                   | (14)%        |
| Investment income                  | 3,167             | 3,345          | (178)                   | (5)%         |
| Federal Government & First Nations | 3,207             | 2,650          | 557                     | 21%          |
| Other - Government of Alberta      | 328               | 618            | (290)                   | (47)%        |
| Other Alberta school authorities   | 303               | 572            | (269)                   | (47)%        |
|                                    | <b>90,102</b>     | <b>100,282</b> | <b>(10,180)</b>         | <b>(10)%</b> |

Other sales and services, gifts and donations and fundraising revenues are mainly generated in schools and inherently variable. The changes in these categories are based on prior year actuals and adjusted for enrolment growth.

**Fees\***

The following chart breaks down expenses for each of these programs and sets out how the fees are calculated to recover costs in excess of non-fee revenue and reserves.

|                                | Budget 2017-18                |                  |               |
|--------------------------------|-------------------------------|------------------|---------------|
|                                | Transportation                | Noon Supervision | Total         |
|                                | (all figures in \$ thousands) |                  |               |
| Government Grants              | 42,135                        | -                | 42,135        |
| Reserve funding                | -                             | -                | -             |
| <b>Available funding</b>       | <b>42,135</b>                 | <b>-</b>         | <b>42,135</b> |
| Busing aides                   | 1,416                         | -                | 1,416         |
| Program delivery               | 1,390                         | -                | 1,390         |
| Noon supervision               | -                             | 10,941           | 10,941        |
| <b>Salaries and benefits</b>   | <b>2,806</b>                  | <b>10,942</b>    | <b>13,747</b> |
| Transportation services        | 44,117                        | -                | 44,117        |
| Other supplies and services    | 134                           | 230              | 364           |
| <b>Contracts and services</b>  | <b>44,251</b>                 | <b>230</b>       | <b>44,481</b> |
| <b>Waivers</b>                 | <b>771</b>                    | <b>1,816</b>     | <b>2,586</b>  |
| <b>Uncollectible accounts</b>  | <b>237</b>                    | <b>978</b>       | <b>1,215</b>  |
|                                | <b>48,065</b>                 | <b>13,965</b>    | <b>62,029</b> |
| <b>Funding gap</b>             | <b>(5,930)</b>                | <b>(13,965)</b>  | <b>19,895</b> |
| <b>Fees</b>                    | <b>5,930</b>                  | <b>13,965</b>    | <b>19,895</b> |
| <b>Net (deficit) / surplus</b> | <b>-</b>                      | <b>-</b>         | <b>-</b>      |

\*Budget for transportation fees revenue and service costs budget may be amended in the Fall Budget subject to finalization of student registration and route planning as well as Ministerial approval of fee levels.

The Provincial Government is making life better and more affordable for Alberta families through the March 2 proclamation of [Bill 1: An Act to Reduce School Fees](#). Through this bill the Government is eliminating fees for specific instructional supplies or materials, as well as reducing or eliminating transportation fees, particularly for those students attending a regular program at their designated school who live beyond 2.4 kilometres.

Under the Province’s [2017 Alberta budget](#), school boards will be provided with funding to help offset the revenue loss projected as a result of Bill 1, and help ensure that boards can maintain current educational programming without increasing other still-permitted school fees.

The CBE will receive a funding allocation of \$18.3 million for 2017-18 to replace fee revenue as a result of Bill 1. (Grant amount as at the date this report was written). As a result, we will see total fee revenues decrease by \$13.4 million. This is the combined impact of eliminated ISM fees and reduced transportation fees. Students who do not qualify for transportation under Bill 1 will continue to be charged a fee or be required to seek other options.

For the time being school boards’ ability to charge other fees is not being changed; however, the new School Fees Regulation will provide the Minister with the authority to regulate these fees in the future.

In keeping with our values, the CBE is continuing its comprehensive waiver process to ensure that no student is denied access to an education due to the inability to pay some or all fees. Learning is, and remains, our central purpose.

#### Instructional Supplies and Materials (ISM) fees

Under Bill 1 school boards will no longer be able to charge a fee for instructional supplies or materials such as textbooks, workbooks, printing and paper costs.

This budget reflects that ISM fees will no longer be charged and that a government grant will be received in lieu of that fee revenue. Schools will receive a budget allocation for the purchase of instructional supplies and materials in lieu of fee collection.

#### Noon supervision fees

The CBE charges central fees for noon supervision. Noon supervision fees are only charged for students using those services. The cost of noon supervision is fully paid by school fees. Costs of providing the services include direct labour and supplies, as well as the cost of fee waivers and uncollectible accounts.

To keep fees as low as possible the CBE is committed to being as efficient as possible in the provision of services.

There will be no increase to noon supervision fees for 2017-18 (subject to Ministerial approval). Costs associated with providing noon supervision services have increased and service levels will adjust accordingly.

|                              | four day |         |       | four / five day |         |       | five day |         |       |
|------------------------------|----------|---------|-------|-----------------|---------|-------|----------|---------|-------|
|                              | 2016-17  | 2017-18 | % var | 2016-17         | 2017-18 | % var | 2016-17  | 2017-18 | % var |
| Bused and non-bused students | \$ 255   | \$ 255  | -     | \$ 275          | \$ 275  | -     | \$ 285   | \$ 285  | -     |

## **Transportation services and fees background**

For the past two years the CBE has been working towards developing a long-term, sustainable transportation system. We are making a number of scheduled changes for the 2017-18 school year that will eliminate the need to subsidize the costs of transportation from the global CBE budget. We will continue to ensure the delivery of safe and efficient transportation for students.

### **2017-18 Transportation Fees**

Fee rates planned for 2017-18 and communicated in this report are subject to Ministerial approval. In the event that fees are approved at different rates, the budget changes will be reflected in the CBE's Fall Budget Update.

Through Bill 1 the Government has eliminated or reduced transportation fees, particularly for students attending a regular program at their designated school. Students requiring complex learning needs transportation or attending a special setting are also exempt from transportation fees.

Grade 6-12 students residing more than 2.4 km from their designated school attending a regular program and assigned to Calgary Transit will be responsible for purchasing monthly bus passes. The CBE will rebate families \$549, meaning they will pay \$151/year for the added value of access to public transportation (subject to Ministerial approval).

All other regular and alternative program riders assigned to yellow school buses will be charged \$335/year (subject to Ministerial approval). This is the same fee as 2016-17. Those assigned to Calgary Transit will pay \$700/year (\$70/month).

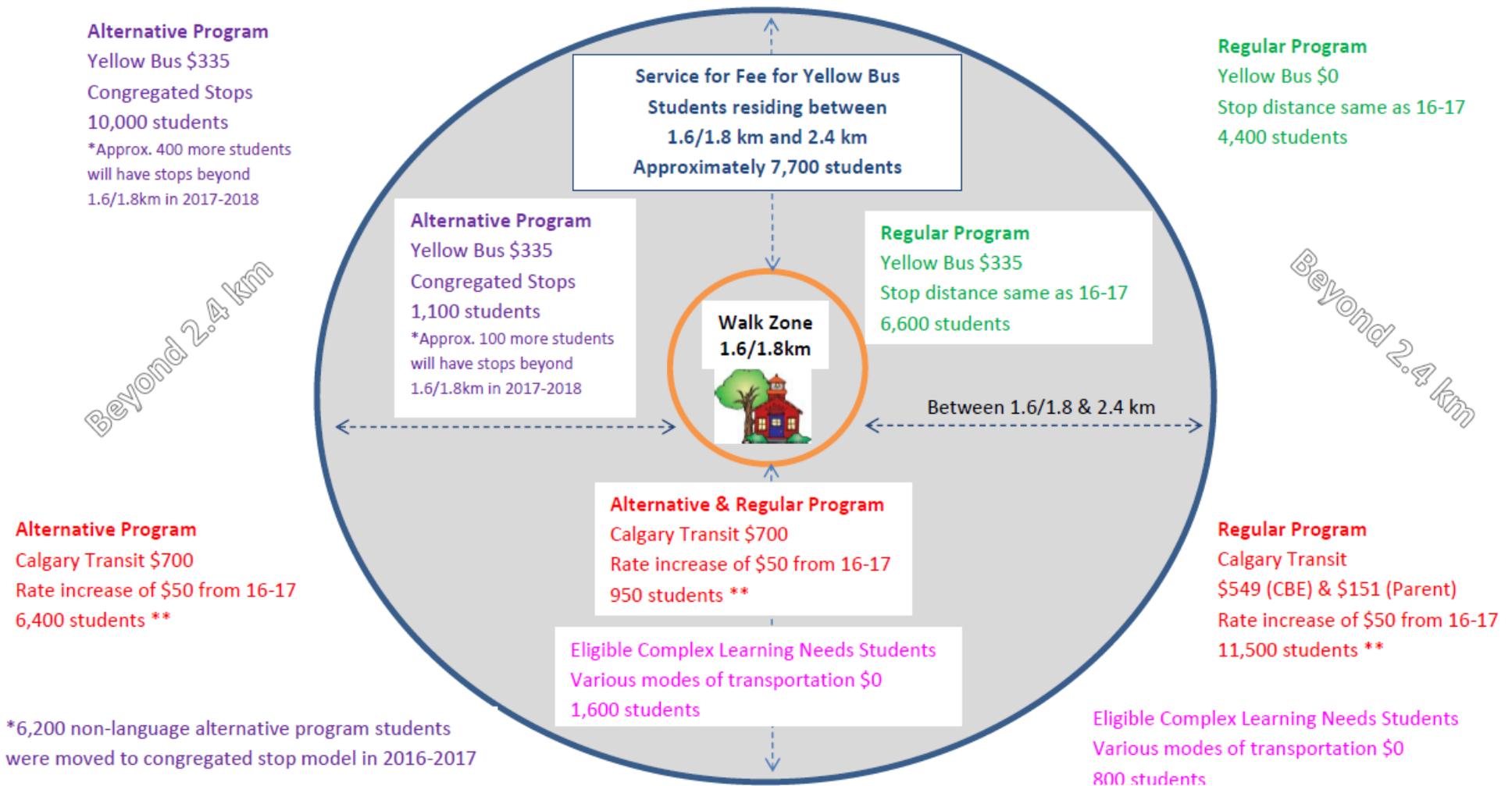
### **2017-18 Transportation Service Levels**

For the majority of students attending a regular program transportation service levels for 2017-18 will remain similar to what was provided in 2016-17. We will continue to work within CBE guidelines, where feasible, to provide yellow school bus transportation. Elementary students will access a stop within 1.6 km of their homes and middle school/junior high students will access a stop within 1.8 km of their homes.

Starting in September 2017 the majority of students in alternative programs will access yellow school bus service within a congregated stop model. These students may have bus stops located beyond the travel distance standards (above). Despite the change, we anticipate the majority of students in larger alternative programs (French Immersion, Spanish Bilingual and Traditional Learning Centre) will have a stop within 1 km from home because of the higher density of student population within a community accessing these programs. The longest distances to a yellow bus stop will be for students travelling across the city to a program at a single site.

Mid-day kindergarten service will be maintained for all programs. Fees are determined by the program the child attends.

## Proposed Transportation Service Levels and Fees 2017-2018



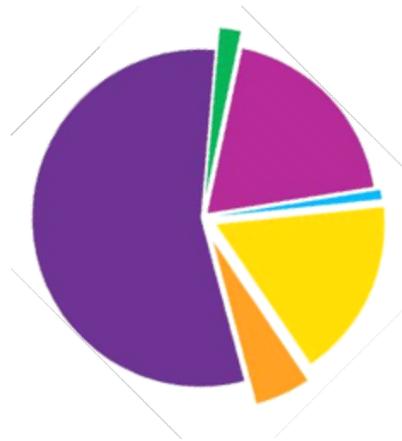
\*6,200 non-language alternative program students were moved to congregated stop model in 2016-2017

\*\*Transit riders includes 'eligible not actual' riders estimated at 18,850 students

Expenses

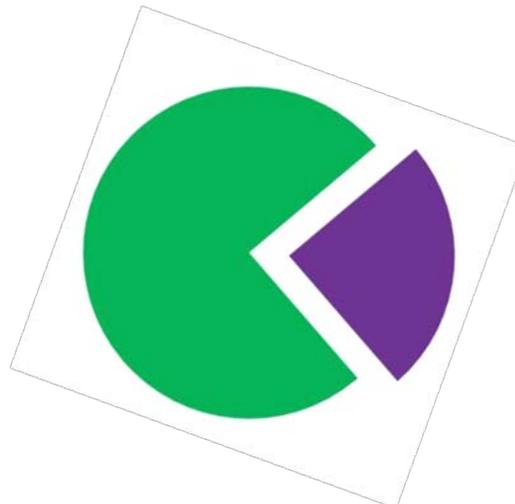
Expenses by type

|   | Budget            |             | Fall Budget       |  |
|---|-------------------|-------------|-------------------|--|
|   | 2017-18           |             | 2016-17           |  |
|   | (in \$ thousands) | %           | (in \$ thousands) |  |
| Certificated permanent salaries and benefits              | 764,576           | 55%         | 751,779           |  |
| Non-certificated permanent salaries and benefits          | 261,973           | 19%         | 253,696           |  |
| Services, contracts and supplies                          | 240,065           | 18%         | 247,869           |  |
| Other (interest, amortization and uncollectible accounts) | 73,049            | 5%          | 64,936            |  |
| Certificated temporary salaries and benefits              | 27,706            | 2%          | 23,535            |  |
| Non-certificated temporary salaries and benefits          | 12,169            | 1%          | 8,983             |  |
| <b>Expenses by type</b>                                   | <b>1,379,538</b>  | <b>100%</b> | <b>1,350,798</b>  |  |



Expenses by activity

|                             | Budget            |             | Fall Budget       |  |
|-----------------------------|-------------------|-------------|-------------------|--|
|                             | 2017-18           |             | 2016-17           |  |
|                             | (in \$ thousands) | %           | (in \$ thousands) |  |
| Schools and area supports   | 1,037,235         | 75%         | 1,020,851         |  |
| Service unit supports       | 342,303           | 25%         | 329,947           |  |
| <b>Expenses by activity</b> | <b>1,379,538</b>  | <b>100%</b> | <b>1,350,798</b>  |  |



**Expense changes from prior year**

|  | <b>Fall Budget<br/>2016-17</b> | Enrolment     | Remove<br>2016-17<br>one-time<br>activities | Non<br>discretionary<br>increases | Increase in<br>operating<br>costs for<br>new schools | Reduced<br>allocations<br>to schools | Service unit<br>reductions | Transportation | New fee<br>replacement<br>grant | <b>Budget<br/>2017-18</b> |
|--|--------------------------------|---------------|---|-----------------------------------|--|--------------------------------------|----------------------------|----------------|---------------------------------|---------------------------|
| <b>(in \$ thousands)</b>               |                                |               |   |                                   |  |                                      |                            |                |                                 |                           |
| <b>Expenses</b>                        |                                |               |   |                                   |  |                                      |                            |                |                                 |                           |
| Certificated salaries and benefits     | <b>775,314</b>                 | 6,571         | (550)                                       | 11,792                            | 997  | (1,861)                              | 19                         |                |                                 | <b>792,282</b>            |
| Non-certificated salaries and benefits | <b>262,679</b>                 | 11,667        | (155)                                       | 6,653                             | 498  | (2,928)                              | (4,282)                    | 10             |                                 | <b>274,142</b>            |
| Services, contracts and supplies       | <b>247,869</b>                 | 3,428         | (6,459)                                     | 3,147                             | 847  | (6,392)                              | (3,337)                    | (750)          | 1,712                           | <b>240,065</b>            |
| Amortization                           | <b>57,370</b>                  | 2             |   | 9,967                             |  |                                      |                            |                |                                 | <b>67,339</b>             |
| Other (uncollectible accounts)         | <b>5,443</b>                   | 33            |   |                                   |  |                                      |                            | (473)          | (1,201)                         | <b>3,802</b>              |
| Interest and finance charges           | <b>2,123</b>                   |               |   | (215)                             |  |                                      |                            |                |                                 | <b>1,908</b>              |
| <b>Total</b>                           | <b>1,350,798</b>               | <b>21,701</b> | <b>(7,164)</b>                              | <b>31,344</b>                     | <b>2,342</b>   | <b>(11,181)</b>                      | <b>(7,600)</b>             | <b>(1,213)</b> | <b>511</b>                      | <b>1,379,538</b>          |

- Enrolment – includes increased costs associated with increased enrolment as well as adjustments to School Generated Funds (SGF) for enrolment and activity trends.
- Remove 2016-17 one-time activities – includes one-time projects from 2016-17 such as amounts that were carried forward for projects that continued from 2015-16 into 2016-17 are removed from the 2017-18 budget.
- Non-discretionary increases - includes adjustments to amortization expense, changes for grid movement for existing staff in accordance with collective agreements and employee terms of reference, contractual commitments, impacts of utility rates, foreign exchange pressures, and other non-discretionary changes.
- Increase in operating costs for new schools – includes operating costs related to the opening of new schools including the cost of school-based administrative staff and operating costs such as internet connectivity, insurance and utilities.
- Reduced allocations to schools – includes an overall reduction to school budgets by 1.4 per cent from the amount that would have been required to fully maintain service levels in order to meet budget balancing targets.
- Service unit reductions – includes a 3.7 per cent reduction from service unit budgets operating budgets in order to meet budget balancing targets.
- Transportation – includes an adjustment to the transportation program budget to eliminate the contribution from the global budget to support transportation activity.
- New fee replacement grant – includes the elimination of waiver and uncollectible account costs that correspond with fee revenue reduced or eliminated under the guidelines of Bill 1.

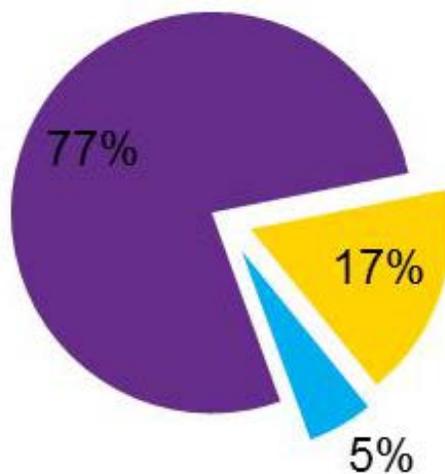
**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 18**

**Expenses by unit**

Expense details are provided by major expense category and operating unit. Further breakdowns and comparisons to the prior year are provided for each operating unit.

|   | Schools & Areas  | Service Unit System Budgets* | Learning      | Facilities & Environmental Services* | Legal        | Communications | Finance/Technology Services | Human Resources | Chief Supt's Office | Board of Trustees | Total            |
|---|------------------|------------------------------|---------------|--------------------------------------|--------------|----------------|-----------------------------|-----------------|---------------------|-------------------|------------------|
| <b>FTEs by:</b>   |                  |                              |               |                                      |              |                |                             |                 |                     |                   |                  |
| Staff (incl ATA, Staff Assn, CUPE, trades)                | 9,178            | 62                           | 226           | 174                                  | 1            | 10             | 148                         | 46              | 1                   | -                 | <b>9,846</b>     |
| Exempt Staff  | 7                | -                            | 24            | 55                                   | 10           | 11             | 46                          | 42              | 2                   | -                 | <b>197</b>       |
| Superintendent  | -                | -                            | 1             | 1                                    | 1            | 1              | 1                           | -               | 2                   | -                 | <b>7</b>         |
| <b>2017-18 FTEs</b>                                       | <b>9,185</b>     | <b>62</b>                    | <b>251</b>    | <b>230</b>                           | <b>12</b>    | <b>22</b>      | <b>195</b>                  | <b>88</b>       | <b>5</b>            | <b>-</b>          | <b>10,050</b>    |
| <b>Expenses by:</b>                                       |                  |                              |               |                                      |              |                |                             |                 |                     |                   |                  |
| Salaries and benefits                                     | 954,115          | 10,247                       | 34,893        | 25,228                               | 1,745        | 2,610          | 24,996                      | 11,260          | 912                 | 418               | <b>1,066,424</b> |
| Supplies and services                                     | 83,076           | 139,121                      | 4,819         | 9,433                                | 137          | 84             | 1,271                       | 1,004           | 242                 | 878               | <b>240,065</b>   |
| Other (interest, amortization and uncollectible accounts) | 44               | 64,380                       | 782           | 3,190                                | 15           | -              | 4,622                       | 14              | 2                   | -                 | <b>73,049</b>    |
| <b>2017-18 Budget</b>                                     | <b>1,037,235</b> | <b>213,748</b>               | <b>40,494</b> | <b>37,851</b>                        | <b>1,897</b> | <b>2,694</b>   | <b>30,889</b>               | <b>12,278</b>   | <b>1,156</b>        | <b>1,296</b>      | <b>1,379,538</b> |
| <b>2016-17 Fall Budget*</b>                               | <b>1,020,794</b> | <b>200,661</b>               | <b>39,162</b> | <b>40,836</b>                        | <b>2,084</b> | <b>2,726</b>   | <b>29,478</b>               | <b>12,549</b>   | <b>1,219</b>        | <b>1,291</b>      | <b>1,350,798</b> |
| Increase/ (decrease)                                      | 16,441           | 13,087                       | 1,332         | (2,985)                              | (187)        | (32)           | 1,411                       | (271)           | (63)                | 5                 | 28,740           |
|   | (a)              | (b)                          | (c)           |                                      |              |                | (d)                         |                 |                     |                   |                  |

\*Certain Fall Budget figures have been restated for comparative purposes



Significant changes from the 2016-17 Fall Budget:

- a) Schools & Areas increased as a result of increased enrolment. This increase has been reduced from the amount required to maintain operations at a level similar to 2016-17 in order to balance the budget within funding constraints. School budgets have been reduced by 1.4 per cent.
- b) System budgets increased for amortization expenses, utilities and insurance relating to new schools and transportation costs to balance the program without contribution from the global budget. These increases have been offset by reductions in Finance/Technology contracts.
- c) Learning increased because of amortization expenses as well as the transfer of Indigenous Learning staff resources from Areas offices, net of target budget reductions.
- d) Finance/Technology Services budget has increased due to amortization expense increases.

All service unit and service unit system budgets have been reduced by a target of 3.7 per cent of their operating budget balance (not including amortization) in order to meet budget balancing targets (equivalent to \$7.6 million). These reductions have been applied in both their operating accounts and system accounts wherever reductions could be made to minimize the impact on staffing and student learning.

**Schools and Areas**

**Resource Allocation Method (RAM) Summary by major allocation (in \$ thousands)**

|  | Spring Allocation |            | Fall Budget       |            |
|--|-------------------|------------|-------------------|------------|
|  | 2017-18           | # students | 2016-17           | # students |
| <u>Per-student allocations</u>                   |                   |            |                   |            |
| K - Grade 3                                      | \$ 196,253        | 39,342     | \$ 195,803        | 38,821     |
| Grades 4 - 6                                     | 108,104           | 27,132     | 104,121           | 25,915     |
| Grades 7 - 9                                     | 99,132            | 24,221     | 96,712            | 23,433     |
| Grades 10 - 12                                   | 106,358           | 27,522     | 107,912           | 28,051     |
| <u>Other allocations</u>                         |                   |            |                   |            |
| Regular, basic staff allocation                  | 71,808            |            | 71,157            |            |
| Contract absences, short-term                    | 11,286            |            | 10,997            |            |
| All other allocations                            | 220,704           |            | 214,495           |            |
| Alberta Teachers Retirement Fund (ATRF)          | 74,105            |            | 73,356            |            |
| <b>Total allocations for schools (incl ATRF)</b> | <b>\$ 887,750</b> |            | <b>\$ 874,553</b> |            |
| Increase from 2016-17                            | 13,197            |            |                   |            |

This table highlights the year-over-year increase in resources allocated to schools via the RAM. This funding supported an additional 92 certificated and 26 non-certificated staff positions in schools.

The RAM is the method by which resources are allocated to schools. Schools are provided resources through the RAM to meet student learning outcomes. The RAM is designed to allocate resources equitably while providing choice in the assignment and deployment of those resources to meet the unique needs of students within schools. The translation of identified fiscal resources into human resources requires a thoughtful, balanced approach that addresses the needs of students and has respectful consideration of staff, as resource decisions contribute to positive attraction and retention. The RAM, which first was introduced for the 2003-04 school year, reflects the flexibility offered within Alberta Education’s Funding Framework.

The entire organization supports student learning. Some specific school and instruction supports are administered on behalf of schools, rather than directly by schools (i.e. through the RAM), as it is more efficient and effective to provide these at a system level rather than to duplicate these at individual schools. Having some resources at the Area and central level allow for a better matching of resources to needs; however, the majority of funds are allocated directly to schools.

**RAM Summary by Area (in \$ thousands)**

|              | Spring Allocation |                | Fall Budget       |                |
|--------------|-------------------|----------------|-------------------|----------------|
|              | 2017-18           | # students     | 2016-17           | # students     |
| Area 1       | \$ 128,872        | 16,771         | \$ 142,978        | 19,364         |
| Area 2       | 121,968           | 16,634         | 193,436           | 25,811         |
| Area 3       | 120,285           | 15,217         | 177,005           | 22,627         |
| Area 4       | 126,131           | 17,185         | 137,768           | 18,472         |
| Area 5       | 127,527           | 18,216         | 223,367           | 29,946         |
| Area 6       | 134,137           | 16,097         | -                 | -              |
| Area 7       | 128,830           | 18,098         | -                 | -              |
| <b>Total</b> | <b>\$ 887,750</b> | <b>118,217</b> | <b>\$ 874,553</b> | <b>116,220</b> |

School budgets in each Area are impacted by the number of students, their learning needs and the types of programs offered.

**Schools and Areas (cont'd)**

|  | <b>Budget<br/>2017-18</b> |                   | <b>Fall Budget<br/>2016-17</b> |                   | <b>Increase /<br/>(Decrease)</b> |                   |
|--|---------------------------|-------------------|--------------------------------|-------------------|----------------------------------|-------------------|
|  | FTE                       | (in \$ thousands) | FTE                            | (in \$ thousands) | FTE                              | (in \$ thousands) |
| <b>Expenses</b>                                  |                           |                   |                                |                   |                                  |                   |
| Certificated permanent salaries and benefits     | <b>6,420</b>              | <b>743,540</b>    | 6,333                          | 731,284           | 87                               | 12,256            |
| Non-certificated permanent salaries and benefits | <b>2,765</b>              | <b>180,862</b>    | 2,753                          | 172,257           | 12                               | 8,605             |
| Other supplies                                   |                           | <b>57,814</b>     |                                | 77,334            |                                  | (19,520)          |
| Certificated temporary salaries and benefits     |                           | <b>23,175</b>     |                                | 18,723            |                                  | 4,451             |
| Textbooks and materials                          |                           | <b>10,184</b>     |                                | 8,480             |                                  | 1,704             |
| Professional services                            |                           | <b>9,630</b>      |                                | 3,628             |                                  | 6,002             |
| Non-certificated temporary salaries and benefits |                           | <b>6,537</b>      |                                | 3,410             |                                  | 3,127             |
| Transportation charges                           |                           | <b>2,310</b>      |                                | 2,220             |                                  | 90                |
| Minor equipment                                  |                           | <b>1,617</b>      |                                | 2,431             |                                  | (814)             |
| Travel and subsistence                           |                           | <b>920</b>        |                                | 500               |                                  | 420               |
| Maintenance and repairs                          |                           | <b>367</b>        |                                | 271               |                                  | 96                |
| Dues and fees                                    |                           | <b>188</b>        |                                | 171               |                                  | 17                |
| Interest and finance charges                     |                           | <b>40</b>         |                                | 40                |                                  | -                 |
| Utilities  |                           | <b>31</b>         |                                | 30                |                                  | 1                 |
| Insurance  |                           | <b>15</b>         |                                | 10                |                                  | 5                 |
| Amortization expenses                            |                           | <b>4</b>          |                                | 4                 |                                  | -                 |
| <b>Total expenses</b>                            | <b>9,185</b>              | <b>1,037,235</b>  | <b>9,086</b>                   | <b>1,020,794</b>  | <b>99</b>                        | <b>16,441</b>     |

Students come first and learning is our central purpose. CBE schools live by these words each and every day, and Area offices support them in making it happen. The 2015-16 Provincial Achievement Test and Diploma Exam results show that our students continue to lead the Province in academic outcomes. This is a strong validation of our commitment to students coming first and learning being our central purpose.

Schools create engaging learning experiences and support students in a variety of ways. They also connect with our families and communities to help support student success. For many CBE students and families, their experiences with the CBE occur solely through our schools.

Schools make learning meaningful for individual students and their families. They work collaboratively with service units to create and implement system initiatives that enhance learning experiences and honour the hopes of their students and families. Some of the ways this happens in schools include:

- Teachers personalize learning for students and communicate with families students' progress and achievement.
- Educational assistants provide valuable support to help students be successful.
- Principals provide leadership to school staff and lead learning at the school. They also work with school councils, parent societies and other groups to implement and communicate priorities and initiatives.
- Office staff communicate with students, employees and families to ensure there is a common understanding and implementation of processes and procedures.
- Facility operators keep schools clean and safe.
- Area directors support instructional leaders and teachers to improve student instruction and success.

Our schools are organized into Areas. Each of which is led by a director. Area offices play an important role in providing instructional leadership to principals, helping to deliver system services to schools, supporting school operations and ensuring effective collaboration amongst schools where appropriate. Area offices also work collaboratively together to ensure consistent leadership and direction for principals and schools across the system.

### Schools and Areas (cont'd)

Funding allocated to school budgets via the RAM increased by \$12.5 million (1.6 per cent) over 2016-17. The following decisions were made within the RAM and centralized school budgets for the 2017-18 school year in comparison to 2016-17:

- RAM allocations were provided to four new schools opening during the year: Ron Southern School, Manmeet Singh Bhullar School, Marshall Springs School and Griffith Woods School.
- Per-school allocation rates were increased to correspond with the increased cost for which these allocations are intended (school principal, administrative support, learning commons staff, etc.).
- Per-student allocation rates (would have needed to increase by 0.25 - 0.67 per cent depending on allocation type to maintain the ratio of student to school-based staff) were reduced by 0.42 - 0.83 per cent to reduce the overall RAM budget by \$7.7 million.
- School furniture and equipment and basic decentralized allocations were eliminated for one year. Principals have been encouraged to suspend these types of purchases for one year and focus remaining budget dollars on staffing.
- A moratorium was placed on school-based software purchases except through the approved centralized process to reduce costs across the system.
- The CBE continues to offer full-day kindergarten classes at 15 locations. Research indicates that full-day kindergarten programming provides significant educational benefits for certain groups that actually reduce costs in the longer-term.
- Support for our large and growing English Language Learner population continues with the provision of support for two years beyond the five years for which we are currently funded. The longer-term benefits outweigh the short-term costs.
- The allocation enhancement for resources provided to schools with alternative language programs was eliminated for 2017-18. This amount had been provided to support the increased costs of resources in languages other than English as well as to support the purchase of resources in both English and a second language. An amount will be provided to the Area Offices to support schools in this regard, should an emergent need arise in 2017-18.
- The Aboriginal per-student RAM allocation was maintained. Consistent with the direction set out in the Indigenous Learning Strategy, centralized supports were added in the 2016-17 year with the intention that the per-student RAM allocations would be discontinued in 2017-18. The transition will be extended by one year.
- 71 elementary schools will receive on-demand technology support in 2017-18 rather than a scheduled service model. This is in addition to approximately 50 schools already supported on this model.

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**Learning**

The Learning staff provides instructional and programming supports and services for school and system personnel to assist students in successfully realizing their learning goals.

It includes central supports as well as the budget for operating Chinook Learning Services. Both are shown separately below.

Learning (excluding Chinook Learning Services)

|  | <b>Budget<br/>2017-18</b> |                   | <b>Fall Budget<br/>2016-17</b> |                   | <b>Increase /<br/>(Decrease)</b> |                   |
|--|---------------------------|-------------------|--------------------------------|-------------------|----------------------------------|-------------------|
|  | FTE                       | (in \$ thousands) | FTE                            | (in \$ thousands) | FTE                              | (in \$ thousands) |
| <b>Expenses</b>                                  |                           |                   |                                |                   |                                  |                   |
| Non-certificated permanent salaries and benefits | 103                       | 12,357            | 101                            | 11,956            | 2                                | 401               |
| Certificated permanent salaries and benefits     | 77                        | 10,273            | 72                             | 9,513             | 5                                | 760               |
| Other supplies                                   |                           | 1,006             |                                | 997               |                                  | 9                 |
| Professional services                            |                           | 849               |                                | 852               |                                  | (3)               |
| Amortization expenses                            |                           | 673               |                                | 962               |                                  | (289)             |
| Certificated temporary salaries and benefits     |                           | 432               |                                | 432               |                                  | -                 |
| Non-certificated temporary salaries and benefits |                           | 331               |                                | 331               |                                  | -                 |
| Travel and subsistence                           |                           | 284               |                                | 266               |                                  | 18                |
| Minor equipment                                  |                           | 171               |                                | 171               |                                  | -                 |
| Dues and fees                                    |                           | 95                |                                | 94                |                                  | 1                 |
| Utilities  |                           | 61                |                                | 61                |                                  | -                 |
| Interest and finance charges                     |                           | 39                |                                | 89                |                                  | (50)              |
| Maintenance and repairs                          |                           | 35                |                                | 35                |                                  | -                 |
| Textbooks and materials                          |                           | 34                |                                | 49                |                                  | (15)              |
| Insurance  |                           | 7                 |                                | 7                 |                                  | -                 |
| <b>Total expenses</b>                            | <b>180</b>                | <b>26,646</b>     | <b>173</b>                     | <b>25,815</b>     | <b>7</b>                         | <b>831</b>        |

Learning works with schools and Alberta Education to support the delivery of the Alberta Programs of Study to students and to support the professional learning of staff. Learning leads the implementation of curriculum, assessment and reporting resources. These resources assist teachers, students and parents to ensure students' progress and achieve in their learning. Learning staff support schools with the administration of Provincial Achievement Tests and diploma exams and the ongoing maintenance of student records through the Student Information System.

Learning supports schools with the changing world of technology and best instructional practices. These learning tools include D2L, HomeLogic, Iris, Gmail and Google Apps for Education and resources in school learning commons among many others.

Learning works with Principals every day to offer support in the following areas:

Aboriginal education, attendance, suspensions, student records, expulsions, counselling, early learning services, English Language Learning, multicultural services, language and culture programs and specialized assessment.

Many specialized services for students are available for principals to access to support students including psychologists, braille assistants, deaf and hard of hearing specialists, mental health specialists, occupational and physical therapists, speech language pathologists, translators and more. These central supports are critical to our teachers as they support the more than 21,000 students identified with special education needs, and to the more than 28,000 students identified as English Language Learners.

### Learning (cont'd)

In addition, Learning is responsible for international students, corporate partnerships, comprehensive school health, school nutrition, noon-hour programs, off-site and off-campus learning programs.

The 2017-18 Learning budget supports:

- Implementing a comprehensive mathematics strategy by maintaining specialists with mathematics expertise to provide professional learning opportunities to build capacity to support diverse learners.
- Maintaining a focus on literacy by developing resources to continue to build shared understandings of literacy and provide professional learning opportunities to build capacity to support diverse learners.

Budget changes have been made within Learning to reflect key areas for organizational growth and improvement and to advance the strategic priorities of the CBE including:

- Redeploying five Area diversity and learning support advisors and four Area learning leaders to create a central network to support the Indigenous Education Strategy.
- Enhancing support to schools to address the wellness and mental health of students by:
  - Redeploying existing resources within the service unit to create a Specialist position to provide comprehensive mental health supports.
  - Redeploying existing staff to Areas to provide more direct service to schools by aligning resources to the new area configurations.

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**Learning (cont'd)**

Chinook Learning Services

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Non-certificated permanent salaries and benefits | 54                | 4,155             | 53                     | 3,919             | 1                        | 236               |
| Certificated temporary salaries and benefits     |                   | 3,165             |                        | 3,426             |                          | (261)             |
| Non-certificated temporary salaries and benefits |                   | 2,159             |                        | 2,025             |                          | 134               |
| Certificated permanent salaries and benefits     | 17                | 2,022             | 18                     | 2,064             | (1)                      | (41)              |
| Other supplies                                   |                   | 1,271             |                        | 1,140             |                          | 131               |
| Professional services                            |                   | 497               |                        | 449               |                          | 48                |
| Minor equipment                                  |                   | 266               |                        | 30                |                          | 236               |
| Textbooks and materials                          |                   | 92                |                        | 89                |                          | 3                 |
| Interest and finance charges                     |                   | 70                |                        | 70                |                          | -                 |
| Utilities  |                   | 52                |                        | 56                |                          | (4)               |
| Travel and subsistence                           |                   | 35                |                        | 23                |                          | 12                |
| Rental equipment and facilities                  |                   | 32                |                        | 40                |                          | (8)               |
| Dues and fees                                    |                   | 26                |                        | 13                |                          | 13                |
| Maintenance and repairs                          |                   | 5                 |                        | 4                 |                          | 2                 |
| <b>Total expenses</b>                            | <b>71</b>         | <b>13,848</b>     | <b>71</b>              | <b>13,347</b>     | <b>-</b>                 | <b>501</b>        |

Chinook Learning Services supports student success to complete, upgrade or enhance their high school diplomas as they prepare to enter post-secondary institutions or the world of work.

In 2017-18, Chinook Learning will support its students in several ways. Staff will support students in:

- high school upgrading
- summer school for students in Grades 10-12
- off-campus programs and summer band camps
- adult English Language Learning
- non-credit continuing education (professional development, personal development & corporate training).

Chinook Learning receives revenue from a number of sources including Alberta Education and federal government grants as well as other sales and services.

Programming that is not within the kindergarten – Grade 12 mandate is provided on a cost-recovery basis.

Budget change highlights have been categorized as follows:

- An increase in non-certificated permanent salary costs is due to grid movement.
- An increase in non-certificated temporary dollars is due to additional funding received from the Federal Government for the LINC program.
- Supplies and minor equipment budget have increased for the purchase of books, office supplies, computer equipment and printing.

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**Facilities & Environmental Services**

|  | <b>Budget<br/>2017-18</b> |                   | <b>Fall Budget<br/>2016-17</b> |                   | <b>Increase /<br/>(Decrease)</b> |                   |
|--|---------------------------|-------------------|--------------------------------|-------------------|----------------------------------|-------------------|
|  | FTE                       | (in \$ thousands) | FTE                            | (in \$ thousands) | FTE                              | (in \$ thousands) |
| <b>Expenses</b>                                  |                           |                   |                                |                   |                                  |                   |
| Non-certificated permanent salaries and benefits | 227                       | 24,124            | 258                            | 27,112            | (31)                             | (2,988)           |
| Maintenance and repairs                          |                           | 7,187             |                                | 6,637             |                                  | 550               |
| Amortization expenses                            |                           | 3,190             |                                | 3,324             |                                  | (134)             |
| Professional services                            |                           | 1,319             |                                | 1,314             |                                  | 5                 |
| Non-certificated temporary salaries and benefits |                           | 810               |                                | 750               |                                  | 60                |
| Other supplies                                   |                           | 485               |                                | 468               |                                  | 16                |
| Certificated permanent salaries and benefits     | 3                         | 293               | 4                              | 514               | (2)                              | (220)             |
| Travel and subsistence                           |                           | 176               |                                | 198               |                                  | (21)              |
| Utilities  |                           | 173               |                                | 173               |                                  | -                 |
| Dues and fees                                    |                           | 59                |                                | 313               |                                  | (254)             |
| Minor equipment                                  |                           | 33                |                                | 33                |                                  | -                 |
| Rental equipment and facilities                  |                           | 2                 |                                | 2                 |                                  | 0                 |
| <b>Total expenses</b>                            | <b>230</b>                | <b>37,851</b>     | <b>262</b>                     | <b>40,836</b>     | <b>(32)</b>                      | <b>(2,985)</b>    |

*Certain Fall Budget figures have been restated for comparative purposes.*

Facilities & Environmental Services (FES) provides students and employees with quality learning and working environments.

The supports and services provided by FES include planning for student accommodation and transportation; design, construction, renovation, maintenance and day-to-day operations of school and CBE facilities; internal deliveries; environmental initiatives; and emergency, safety and security services.

FES works closely with students, parents and communities to plan student accommodation and is accountable for the transportation of 38,000 students daily.

To help accommodate students, FES works closely with the Province and the City to manage and complete major capital projects.

FES manages public use rental access of CBE property and provides for the leasing, disposition and management of surplus space and facilities.

FES is also accountable for emergency, safety and security services. Student safety is ensured through expanded safety training opportunities for teachers (welding, science, culinary arts, drama, and auto mechanics) and Career and Technology equipment safety inspections.

Budget change highlights have been categorized as follows:

- Certain certificated staff positions have been eliminated leading to lower cost for certificated salaries and benefits.
- Non-certificated staffing has also decreased due to reductions in positions over a range of departments within FES.
- Non-certificated temporary staffing cost increases relate to seasonal pressures within the Facility Operations department.
- Dues and fees have decreased due to a reduction in resources allocated for professional development.
- Maintenance and repair costs have increased to reflect the additional cost pressures expected from the addition of new school properties in the CBE.
- The travel budget has been reduced to contribute to the targeted budget reductions.
- Amortization costs are expected to decrease based on aging capital assets within Facility & Environmental Services.

**Human Resources and Legal Services**

Legal Services

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Non-certificated permanent salaries and benefits | 11                | 1,528             | 13                     | 1,732             | (2)                      | (204)             |
| Certificated permanent salaries and benefits     | 1                 | 177               | 1                      | 158               | -                        | 18                |
| Other supplies                                   |                   | 43                |                        | 43                |                          | -                 |
| Non-certificated temporary salaries and benefits |                   | 41                |                        | 41                |                          | -                 |
| Dues and fees                                    |                   | 23                |                        | 23                |                          | -                 |
| Minor equipment                                  |                   | 22                |                        | 22                |                          | -                 |
| Professional services                            |                   | 19                |                        | 19                |                          | -                 |
| Travel and subsistence                           |                   | 19                |                        | 19                |                          | -                 |
| Amortization expenses                            |                   | 15                |                        | 15                |                          | -                 |
| Textbooks and materials                          |                   | 5                 |                        | 6                 |                          | (1)               |
| Utilities  |                   | 4                 |                        | 4                 |                          | -                 |
| Maintenance and repairs                          |                   | 2                 |                        | 2                 |                          | -                 |
| <b>Total expenses</b>                            | <b>12</b>         | <b>1,897</b>      | <b>14</b>              | <b>2,084</b>      | <b>(2)</b>               | <b>(187)</b>      |

Legal Services provides the business functions of law, privacy and access.

The service unit handles CBE's Administrative Regulation development, contract administration, Corporate Secretary and administrative support to the Board of Trustees.

Legal Services supports students, schools and the organization by:

- Delivering important information and training to schools on complex legal and privacy issues.
- Providing or coordinating the delivery of legal services on behalf of the CBE.
- Providing risk mitigation oversight.
- Managing the CBE's compliance with Freedom of Information and Protection of Privacy Act (FOIP Act).
- Overseeing the CBE's compliance with applicable law, regulations and policies.
- Coordinating the development of the CBE's administrative regulations and procedures.
- Managing contract processes and standards and maintaining a repository.
- Providing legal counsel to the Board of Trustees and the Chief Superintendent.
- Managing the proceedings of the Board of Trustees.
- Maintaining the corporate record of the Board of Trustees proceedings.

Budget change highlights include:

- The decrease in non-certificated staffing costs is due to the elimination of two positions in order to meet targeted budget reductions.

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Human Resources

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Non-certificated permanent salaries and benefits | 77                | 9,186             | 77                     | 8,884             | -                        | 302               |
| Certificated permanent salaries and benefits     | 11                | 1,841             | 12                     | 1,816             | (1)                      | 25                |
| Professional services                            |                   | 540               |                        | 914               |                          | (374)             |
| Other supplies                                   |                   | 209               |                        | 217               |                          | (9)               |
| Non-certificated temporary salaries and benefits |                   | 134               |                        | 220               |                          | (86)              |
| Travel and subsistence                           |                   | 113               |                        | 122               |                          | (9)               |
| Certificated temporary salaries and benefits     |                   | 100               |                        | 100               |                          | -                 |
| Textbooks and materials                          |                   | 43                |                        | 89                |                          | (45)              |
| Dues and fees                                    |                   | 34                |                        | 93                |                          | (59)              |
| Utilities  |                   | 31                |                        | 31                |                          | -                 |
| Minor equipment                                  |                   | 30                |                        | 35                |                          | (5)               |
| Amortization expenses                            |                   | 14                |                        | 20                |                          | (6)               |
| Maintenance and repairs                          |                   | 3                 |                        | 8                 |                          | (5)               |
| Rental equipment and facilities                  |                   | 2                 |                        | 2                 |                          | -                 |
| <b>Total expenses</b>                            | <b>88</b>         | <b>12,278</b>     | <b>89</b>              | <b>12,549</b>     | <b>(1)</b>               | <b>(271)</b>      |

Human Resources supports employees with all matters related to their employment relationship with the CBE.

In 2017-18, the work of Human Resources supported students, schools and the organization by:

- Supporting over 14,000 employees while they provide a first-class education to Calgary students.
- Proactively recruiting talent while balancing current and future projected needs.
- Supporting continuous learning and leadership development for all employees.
- Overseeing recruitment, total rewards, workforce planning, labour and employee relations, advisory services, employee development, payroll, the human resources management system, the Employee Health Resource Centre, operations and integrated solutions.
- Supporting employee engagement.

Budget change highlights include:

- Two positions have been reduced or eliminated to contribute to the budget reduction target.
- \$0.3 million was removed from the professional services budget as it was provided as a one-time budget in 2016-17.
- An increase in non-certificated salary costs is due to grid movement and supplemental pension adjustments.
- Other budget reductions have been made to contribute to the budget reduction target.

**Communications & Community Engagement**

|  | <b>Budget<br/>2017-18</b> |                   | <b>Fall Budget<br/>2016-17</b> |                   | <b>Increase /<br/>(Decrease)</b> |                   |
|--|---------------------------|-------------------|--------------------------------|-------------------|----------------------------------|-------------------|
|  | FTE                       | (in \$ thousands) | FTE                            | (in \$ thousands) | FTE                              | (in \$ thousands) |
| <b>Expenses</b>                                  |                           |                   |                                |                   |                                  |                   |
| Non-certificated permanent salaries and benefits | 22                        | 2,550             | 22                             | 2,515             | -                                | 36                |
| Non-certificated temporary salaries and benefits |                           | 59                |                                | 59                |                                  | -                 |
| Professional services                            |                           | 43                |                                | 93                |                                  | (50)              |
| Other supplies                                   |                           | 12                |                                | 18                |                                  | (5)               |
| Minor equipment                                  |                           | 10                |                                | 15                |                                  | (5)               |
| Utilities  |                           | 9                 |                                | 9                 |                                  | -                 |
| Dues and fees                                    |                           | 6                 |                                | 12                |                                  | (6)               |
| Travel and subsistence                           |                           | 3                 |                                | 4                 |                                  | (1)               |
| Maintenance and repairs                          |                           | 1                 |                                | 1                 |                                  | (1)               |
| Textbooks and materials                          |                           | 1                 |                                | 1                 |                                  | -                 |
| <b>Total expenses</b>                            | <b>22</b>                 | <b>2,694</b>      | <b>22</b>                      | <b>2,726</b>      | <b>-</b>                         | <b>(32)</b>       |

Communications and Community Engagement creates and delivers consistent and timely messages to our various stakeholders, including parents/guardians, students, staff, government, unions and associations and members of the community. This centralized department provides ongoing communications and community engagement advice and support to schools, service units, Board of Trustees and to support system priorities.

Support includes:

- Being the “first point of contact” for the public, answering questions and directing inquiries through the public information line.
- Managing media relations and social media activities on behalf of the system, including emergency and crisis communication (fires, natural disasters, student or staff incidents, matters involving Calgary Police Services) advice and support for schools.
- Managing large-scale public engagement projects and providing advice and support to schools and service units in planning and managing their engagement activities.
- Providing strategic communications advice to schools, service units and the Board of Trustees.
- Managing the design and content of the CBE corporate website, our internal employee website, individual school websites and other public and internal websites.
- Managing SchoolMessenger, our mass and emergency communications tool. This includes technical administration and support as well as ongoing advice and training to users while continually looking for ways to improve and expand the capabilities of the tool.
- Managing the print, design and production of a variety of materials for schools and the system including templates, school brochures, banners and course guides. We also produce a variety of video and photo projects and online learning resources that support employee professional learning and share the good stories of our schools and system.

In 2016-17, the department introduced a new, system-wide approach to public engagement called the Dialogue Framework. Support and training for staff in working with the Dialogue Framework is being developed this year.

In the spring of 2017, the department began moving school websites to an innovative new platform. This platform will make it simpler for schools to manage their own websites, while enabling students, staff and families to find information more quickly and easily.

Budget change highlights include:

- Reductions have been made in accordance with budget balancing targets.

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**Finance / Technology Services**

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Non-certificated permanent salaries and benefits | 194               | 24,374            | 194                    | 24,152            | -                        | 222               |
| Amortization expenses                            |                   | 4,622             |                        | 3,301             |                          | 1,321             |
| Non-certificated temporary salaries and benefits |                   | 497               |                        | 547               |                          | (50)              |
| Professional services                            |                   | 364               |                        | 441               |                          | (77)              |
| Dues and fees                                    |                   | 271               |                        | 271               |                          | -                 |
| Other supplies                                   |                   | 264               |                        | 264               |                          | -                 |
| Minor equipment                                  |                   | 226               |                        | 226               |                          | -                 |
| Certificated permanent salaries and benefits     | 1                 | 127               | 1                      | 130               | -                        | (3)               |
| Travel and subsistence                           |                   | 83                |                        | 83                |                          | -                 |
| Utilities  |                   | 54                |                        | 54                |                          | -                 |
| Maintenance and repairs                          |                   | 8                 |                        | 8                 |                          | -                 |
| Textbooks and materials                          |                   | 1                 |                        | 1                 |                          | -                 |
| <b>Total expenses</b>                            | <b>195</b>        | <b>30,889</b>     | <b>195</b>             | <b>29,478</b>     | <b>-</b>                 | <b>1,411</b>      |

Finance/Technology Services is made up of three integrated teams.

The Financial Services group provides financial support and services to ensure resources are available to create a personalized learning environment for students including:

- Preparing the annual budget and related reports.
- Monitoring and reporting on financial performance through the year.
- Supporting sound financial practices in schools and across the CBE.
- Providing financial administration of school noon supervision services, student transportation, and instructional supplies and materials programs, including waivers and collections.
- Seeking the best deals possible when purchasing goods and service.
- Paying the bills on time.

Information Technology Services (ITS) designs, builds and supports the CBE's technology infrastructure and works to protect the integrity of CBE systems against threats including:

- Operating across 250 discrete sites which involves approximately 250,000 data access points.
- Supporting students every day, all year long with access to services and digital resources.
- Holding responsibility for massive volumes of data and records (digital and physical) generated annually.

Client Technology Services (CTS), work directly in our schools and across our system to ensure that computers, tablets and other school-based technology (printers, digital displays, etc.) are available, accessible and appropriate for students and their learning. This includes:

- Working with teachers, principals and other school-based staff to develop targeted plans for technology.
- Empowering students to collaborate, connect, explore as they personalize their learning through the purposeful use of technology.
- Supporting the myriad of software solutions that are part and parcel of the modern learning environment.

Budget change highlights include:

- Increase in staffing costs due to grid increments.
- Increase in amortization expenses for 2017-18.

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**Chief Superintendent's Office**

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Certificated permanent salaries and benefits     | 2                 | 615               | 2                      | 623               | -                        | (8)               |
| Non-certificated permanent salaries and benefits | 3                 | 290               | 3                      | 300               | -                        | (11)              |
| Rental equipment and facilities                  |                   | 164               |                        | 164               |                          | -                 |
| Professional services                            |                   | 29                |                        | 73                |                          | (44)              |
| Dues and fees                                    |                   | 13                |                        | 13                |                          | -                 |
| Other supplies                                   |                   | 19                |                        | 19                |                          | -                 |
| Travel and subsistence                           |                   | 9                 |                        | 9                 |                          | -                 |
| Certificated temporary salaries and benefits     |                   | 8                 |                        | 8                 |                          | -                 |
| Utilities  |                   | 4                 |                        | 4                 |                          | -                 |
| Maintenance and repairs                          |                   | 2                 |                        | 2                 |                          | -                 |
| Interest and finance charges                     |                   | 2                 |                        | -                 |                          | 2                 |
| Minor equipment                                  |                   | 1                 |                        | 2                 |                          | (1)               |
| Textbooks and materials                          |                   | 1                 |                        | 1                 |                          | -                 |
| Amortization expenses                            |                   | 1                 |                        | 2                 |                          | (1)               |
| <b>Total expenses</b>                            | <b>5</b>          | <b>1,156</b>      | <b>5</b>               | <b>1,219</b>      | <b>-</b>                 | <b>(63)</b>       |

The Chief Superintendent's office leads strategic planning for student success based on the Board of Trustees' values and policies.

- The Chief Superintendent, as both the Chief Executive Officer and Chief Educational Officer, develops the Three Year Education Plan to improve student success and ensures that students and their learning are at the centre of organizational decisions.
- The Deputy Chief Superintendent leads the learning and operations in each of CBE's 247 schools.
- The Chief Superintendent's Office is a key liaison point between all components of the CBE and the many individuals and groups who hold an interest in public education.

Budget change highlights include:

- Salary and benefits budgets have been adjusted to reflect actual benefit costs.
- Reductions in budgets and associated activities in order to meet budget reduction targets.

**Board of Trustees**

|  | <b>Budget<br/>2017-18</b> | <b>Fall Budget<br/>2016-17</b> | <b>Increase /<br/>(Decrease)</b> |
|--|---------------------------|--------------------------------|----------------------------------|
|  | (in \$ thousands)         |                                |                                  |
| <b>Expenses</b>                                  |                           |                                |                                  |
| Professional services                            | <b>578</b>                | 577                            | 1                                |
| Non-certificated permanent salaries and benefits | <b>418</b>                | 418                            | -                                |
| Dues and fees                                    | <b>252</b>                | 252                            | -                                |
| Travel and subsistence                           | <b>37</b>                 | 33                             | 4                                |
| Other supplies                                   | <b>9</b>                  | 9                              | -                                |
| Utilities  | <b>1</b>                  | 1                              | -                                |
| Textbooks and materials                          | <b>1</b>                  | 1                              | -                                |
| <b>Total expenses</b>                            | <b>1,296</b>              | <b>1,291</b>                   | <b>5</b>                         |

The Board of Trustees represent, lead and serve Calgarians and govern the CBE. This is done by establishing expectations for organizational results and quality operational performance and then monitoring actual performance against those expectations. This monitoring takes place at public board meetings.

The Board of Trustees works for the best interest of the CBE and its students. As part of its role the Board connects with key stakeholders and advocates for the needs of the system with elected officials such as MLAs and City Councillors.

The Board of Trustees budget includes all items related to the governance of the organization including Trustee remuneration, office expenses and travel costs, financial audit fees, election costs, and Alberta School Boards Association fees.

The Board of Trustees' budget does not include the cost of services and supports provided by the service units in delivering on the board's governance responsibilities. Service and support costs to the board are absorbed by the budget of the relevant service unit.

Budget change highlights for the Board of Trustees include:

- \$6,000 increase in professional services due to increased estimates for the cost of the upcoming municipal election. The estimated cost is accrued over four years and amount updated as additional information becomes available.
- Budget amounts have been re-aligned to represent planned spending in each category.

**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 18**

**Service Unit (Corporate) System Budgets**

|  | Budget<br>2017-18 |                   | Fall Budget<br>2016-17 |                   | Increase /<br>(Decrease) |                   |
|--|-------------------|-------------------|------------------------|-------------------|--------------------------|-------------------|
|  | FTE               | (in \$ thousands) | FTE                    | (in \$ thousands) | FTE                      | (in \$ thousands) |
| <b>Expenses</b>                                  |                   |                   |                        |                   |                          |                   |
| Amortization expenses                            |                   |                   |                        |                   |                          |                   |
| Transportation charges                           |                   | 58,820            |                        | 49,741            |                          | 9,079             |
| Maintenance and repairs                          |                   | 43,753            |                        | 40,712            |                          | 3,041             |
| Utilities  |                   | 39,534            |                        | 40,004            |                          | (470)             |
| Rental equipment and facilities                  |                   | 24,749            |                        | 24,118            |                          | 631               |
| Professional services                            |                   | 10,440            |                        | 9,928             |                          | 511               |
| Certificated permanent salaries and benefits     |                   | 10,198            |                        | 10,319            |                          | (120)             |
| Insurance  | 31                | 5,688             | 29                     | 5,678             | 2                        | 9                 |
| Other supplies                                   |                   | 4,980             |                        | 4,780             |                          | 200               |
| Other (uncollectible accounts)                   |                   | 4,865             |                        | 4,501             |                          | 364               |
| Non-certificated permanent salaries and benefits |                   | 3,801             |                        | 5,443             |                          | (1,642)           |
| Interest and finance charges                     | 31                | 2,132             | 24                     | 452               | 7                        | 1,681             |
| Non-certificated temporary salaries and benefits |                   | 1,759             |                        | 1,924             |                          | (165)             |
| Certificated temporary salaries and benefits     |                   | 1,600             |                        | 1,600             |                          | -                 |
| Dues and fees                                    |                   | 826               |                        | 847               |                          | (21)              |
| Minor equipment                                  |                   | 598               |                        | 608               |                          | (10)              |
| <b>Total expenses</b>                            |                   | <b>5</b>          |                        | <b>5</b>          |                          | <b>-</b>          |
|  | <b>62</b>         | <b>213,748</b>    | <b>53</b>              | <b>200,661</b>    | <b>9</b>                 | <b>13,087</b>     |

*Certain fall budget figures have been restated for comparative purposes*

CBE expenditures which are made on behalf of the entire organization are grouped together for budget presentation as 'Corporate'. While certain Service Units may have accountability for the oversight of these budgets, they are not the cost of operating a specific service unit and are therefore presented separately. Examples include Professional Improvement Fund (ATA and non-ATA) leave costs, staff secondments for union activities, legal fees, amortization of facilities, utilities, student transportation, interest expense and bank charges. In some years these accounts may also include system provisions for severance accruals or retroactive payroll costs due to union settlements.

Budget change highlights include:

- An increase in school building amortization. Amortization decreases as assets become fully amortized and increases with the acquisition of new assets. There is a large increase for 2017-18 due to completion of several new schools.
- An increase in transportation costs to provide services to students within total funding available.
- A reduction in repairs and maintenance related to technology contracts as the scope of support will be reduced to meet budget reduction targets.
- An increase in rental equipment and facilities due to increases in lease and operating costs.
- Reduction in anticipated waived and uncollectible fees due to the elimination of ISM fees and reduction in the number of students paying fees for transportation.
- An increase in non-certificated permanent staffing due to realignment of those salaries charged to projects for schools, capital and IMR.

**Service Unit (Corporate) System Budgets (cont'd)**

Breakdown by Service Unit (in \$ thousands)

|  | Chief's Office | Comm-unications | Facilities & Environmental Services | Finance / Technology Services | General Counsel | Human Resources | Learning     | Education Matters | Total          |
|--|----------------|-----------------|-------------------------------------|-------------------------------|-----------------|-----------------|--------------|-------------------|----------------|
| Expenses                               |                |                 |                                     |                               |                 |                 |              |                   |                |
| Amortization expense                   | -              | 63              | 41,159                              | 15,953                        | -               | -               | 1,636        | 9                 | <b>58,820</b>  |
| Transportation                         | -              | -               | 43,753                              | -                             | -               | -               | -            | -                 | <b>43,753</b>  |
| Maintenance and repair                 | -              | -               | 33,531                              | 5,956                         | -               | 47              | -            | -                 | <b>39,534</b>  |
| Utilities                              | -              | -               | 19,995                              | 4,754                         | -               | -               | -            | -                 | <b>24,749</b>  |
| Rental equipment and facilities        | -              | -               | 10,398                              | -                             | -               | -               | -            | 42                | <b>10,440</b>  |
| Professional services                  | -              | 197             | 3,881                               | 789                           | 832             | 4,361           | 95           | 43                | <b>10,198</b>  |
| Certificated salaries and benefits     | -              | -               | -                                   | 1,960                         | -               | 4,517           | 37           | -                 | <b>6,514</b>   |
| Insurance                              | -              | -               | -                                   | 4,980                         | -               | -               | -            | -                 | <b>4,980</b>   |
| Other supplies                         | 1,100          | 2               | -                                   | 1,460                         | -               | 1,428           | 2            | 874               | <b>4,865</b>   |
| Other (uncollectible accounts)         | -              | -               | -                                   | 3,801                         | -               | -               | -            | -                 | <b>3,801</b>   |
| Non-certificated salaries and benefits | -              | 265             | 1,291                               | 858                           | -               | 805             | 8            | 506               | <b>3,733</b>   |
| Interest and finance charges           | -              | -               | -                                   | 1,759                         | -               | -               | -            | -                 | <b>1,759</b>   |
| Dues and fees                          | -              | 5               | -                                   | -                             | -               | 593             | -            | -                 | <b>598</b>     |
| Minor equipment                        | -              | -               | -                                   | 5                             | -               | -               | -            | -                 | <b>5</b>       |
| <b>Total</b>                           | <b>1,100</b>   | <b>532</b>      | <b>154,007</b>                      | <b>42,275</b>                 | <b>832</b>      | <b>11,749</b>   | <b>1,779</b> | <b>1,474</b>      | <b>213,748</b> |

The Chief's office system budget includes funds allocated throughout the year for unforeseen or emerging issues.

Communications and Community Engagement service unit budget is related to community engagement.

Facilities & Environmental Services corporate budgets include utilities costs for the system, amortization for school buildings and student transportation (charter costs, taxis, Handi-bus). Also included are the maintenance and repair costs associated with Infrastructure, Maintenance and Renewal targeted revenues. FES is responsible for maintenance projects such as the replacement of roofs, windows, siding and building mechanical systems that fail or exceed their life expectancy. The majority of our facilities are more than 50 years old. While the safety of our students and staff is always ensured, the estimated deferred maintenance figures are in excess of \$150 million and are growing each year.

Finance/Technology Services accounts include budget provisions for technology licenses, subscriptions and fees, amortization for board-funded assets, post-employment benefits expense, Alberta Teacher's Retirement Fund for service unit staff, bank charges, waived and uncollectible fees, internal audit and insurance.

General Counsel includes the cost of external legal counsel fees.

Human Resources corporate budget includes the cost of the outsourced HR system service provider, provision to advance leadership practice, Professional Improvement Fellowship (PIF) budget (in accordance with the ATA Collective Agreement), budgeted secondments and staff development funds.

Learning Services corporate budgets include provisions for programs supporting suicide prevention and therapeutic intervention, the budget for Calgary Police Services school resource officers as well as amortization for learning information systems.

In accordance with Public Sector Accounting Standards, EducationMatters is consolidated for the CBE's financial reporting purposes. Its annual budget has been included with the CBE budget for comparative purposes.

## Budget projections

### Projection assumptions

The financial plan reflects the budget for 2017-18, the comparative fall budget for 2016-17, actual results for 2014-15 and 2015-16 as well as projections for three future periods. The projection years assume cost increases resulting from increased enrolment, the opening of new schools and staff grid movement increases. These are known costs. It projects staffing increases to maintain current student to school-based staffing ratios. With respect to revenue, we assume that the Government will continue to fund for enrolment growth and have assumed 2015-16 funding rates. The excess of expenses over anticipated revenues is the cost savings to be found in order to balance the budget in those years.

The Board of Trustees' Operational Expectation 5: Financial planning requires a multi-year budget and plan for fiscal soundness when future Government funding commitments have been made. The Provincial Government's budget process does not provide for long-term financial certainty. Government budgets are approved annually by the Legislature therefore, future spending commitments are always subject to change. In the absence of certainty we have not presented balanced budgets in the projection years. As a result, the gaps between revenue and expenses in the forecast years simply reflect the magnitude of the decisions needed to balance the budget in those years.

**CALGARY BOARD OF EDUCATION  
BUDGET 2017 – 18**

**2017-18 budget, comparatives and forecasts summary**

|   | Actuals |           | Actuals |           | Actuals |           | Fall Budget |           | Budget  |           | Forecasts |           |         |           |         |           |
|---|---------|-----------|---------|-----------|---------|-----------|-------------|-----------|---------|-----------|-----------|-----------|---------|-----------|---------|-----------|
|   | 2013-14 |           | 2014-15 |           | 2015-16 |           | 2016-17     |           | 2017-18 |           | 2018-19   |           | 2019-20 |           | 2020-21 |           |
|   | FTE     | \$ 000    | FTE     | \$ 000    | FTE     | \$ 000    | FTE         | \$ 000    | FTE     | \$ 000    | FTE       | \$ 000    | FTE     | \$ 000    | FTE     | \$ 000    |
| <b>Revenues</b>   |         |           |         |           |         |           |             |           |         |           |           |           |         |           |         |           |
| Alberta Education   |         | 1,101,997 |         | 1,144,396 |         | 1,208,794 |             | 1,230,690 |         | 1,274,436 |           | 1,296,616 |         | 1,318,232 |         | 1,343,578 |
| Fees  |         | 40,453    |         | 47,148    |         | 49,876    |             | 51,456    |         | 38,094    |           | 38,718    |         | 39,414    |         | 40,122    |
| Other sales and services                                  |         | 20,677    |         | 24,329    |         | 27,272    |             | 19,360    |         | 25,144    |           | 25,556    |         | 26,015    |         | 26,483    |
| All other revenue   |         | 25,207    |         | 22,767    |         | 23,891    |             | 22,853    |         | 20,162    |           | 20,488    |         | 20,851    |         | 21,220    |
| Federal Government and First Nations                      |         | 2,329     |         | 2,904     |         | 2,987     |             | 2,650     |         | 3,207     |           | 3,207     |         | 3,207     |         | 3,207     |
| Investment income   |         | 7,395     |         | 14,863    |         | 12,146    |             | 3,345     |         | 3,167     |           | 3,167     |         | 3,167     |         | 3,167     |
| Other - Government of Alberta                             |         | 1,386     |         | 1,108     |         | 733       |             | 618       |         | 328       |           | 328       |         | 328       |         | 328       |
|   |         | 1,199,444 |         | 1,257,515 |         | 1,325,699 |             | 1,330,972 |         | 1,364,538 |           | 1,388,080 |         | 1,411,214 |         | 1,438,105 |
| <b>Expenses by block</b>                                  |         |           |         |           |         |           |             |           |         |           |           |           |         |           |         |           |
| Instruction - Grades 1-12                                 | 7,532   | 892,719   | 7,716   | 940,461   | 7,877   | 988,983   | 8,106       | 1,015,538 | 8,206   | 1,030,679 | 8,331     | 1,063,564 | 8,469   | 1,093,528 | 8,591   | 1,125,592 |
| Plant operations and maintenance                          | 825     | 151,746   | 829     | 157,489   | 826     | 167,923   | 884         | 174,053   | 847     | 182,195   | 860       | 188,008   | 874     | 193,305   | 887     | 198,973   |
| Instruction - Early Childhood Services                    | 390     | 44,996    | 436     | 49,136    | 481     | 49,003    | 518         | 55,553    | 526     | 57,353    | 534       | 59,182    | 543     | 60,850    | 551     | 62,634    |
| Transportation  | 41      | 40,815    | 43      | 44,336    | 43      | 48,447    | 43          | 45,393    | 44      | 48,065    | 44        | 49,598    | 45      | 50,996    | 46      | 52,491    |
| Board & system administration                             | 164     | 36,603    | 158     | 33,917    | 156     | 33,548    | 158         | 37,073    | 159     | 37,495    | 162       | 38,691    | 165     | 39,781    | 167     | 40,947    |
| External services   | 294     | 23,421    | 263     | 20,814    | 270     | 23,234    | 262         | 23,188    | 268     | 23,751    | 272       | 24,509    | 277     | 25,199    | 281     | 25,938    |
|   | 9,245   | 1,190,300 | 9,444   | 1,246,153 | 9,652   | 1,311,138 | 9,971       | 1,350,798 | 10,050  | 1,379,538 | 10,202    | 1,423,552 | 10,373  | 1,463,659 | 10,522  | 1,506,575 |
| <b>Expenses by object</b>                                 |         |           |         |           |         |           |             |           |         |           |           |           |         |           |         |           |
| Certificated permanent salaries and benefits              | 5,990   | 675,027   | 6,150   | 702,172   | 6,265   | 727,897   | 6,472       | 751,779   | 6,562   | 764,576   | 6,669     | 793,641   | 6,789   | 821,405   | 6,902   | 847,763   |
| Non-certificated permanent salaries and benefits          | 3,255   | 222,259   | 3,294   | 233,449   | 3,388   | 237,347   | 3,499       | 253,696   | 3,488   | 261,973   | 3,533     | 267,668   | 3,584   | 273,351   | 3,621   | 278,446   |
| Services, contracts and supplies                          |         | 207,290   |         | 217,687   |         | 233,130   |             | 247,869   |         | 240,065   |           | 246,428   |         | 252,985   |         | 259,349   |
| Amortization  |         | 52,158    |         | 51,644    |         | 52,092    |             | 57,370    |         | 67,339    |           | 70,139    |         | 70,139    |         | 75,139    |
| Certificated temporary salaries and benefits              |         | 20,557    |         | 26,355    |         | 41,974    |             | 23,535    |         | 27,706    |           | 27,704    |         | 27,704    |         | 27,704    |
| Non-certificated temporary salaries and benefits          |         | 9,586     |         | 11,251    |         | 11,988    |             | 8,983     |         | 12,169    |           | 12,168    |         | 12,168    |         | 12,168    |
| Other (uncollectible accounts)                            |         | 1,321     |         | 1,557     |         | 5,196     |             | 5,443     |         | 3,802     |           | 3,863     |         | 3,932     |         | 3,997     |
| Interest and finance charges                              |         | 2,102     |         | 2,038     |         | 1,514     |             | 2,123     |         | 1,908     |           | 1,941     |         | 1,975     |         | 2,009     |
|   | 9,245   | 1,190,300 | 9,444   | 1,246,153 | 9,652   | 1,311,138 | 9,971       | 1,350,798 | 10,050  | 1,379,538 | 10,202    | 1,423,552 | 10,373  | 1,463,659 | 10,522  | 1,506,575 |
| <b>Surplus / (deficit)</b>                                |         | 9,144     |         | 11,362    |         | 14,561    |             | (19,826)  |         | (15,000)  |           | (35,472)  |         | (52,444)  |         | (68,470)  |
| <b>Transfers from / (to) operating reserves</b>           |         | (6,855)   |         | 3,760     |         | 1,130     |             | 33,040    |         | 5,000     |           | -         |         | -         |         | -         |
| <b>Add/(deduct) capital items paid by operating funds</b> |         |           |         |           |         |           |             |           |         |           |           |           |         |           |         |           |
| Capital assets acquired                                   |         | (22,367)  |         | (28,817)  |         | (35,560)  |             | (63,390)  |         | (22,910)  |           | (28,150)  |         | (28,150)  |         | (28,150)  |
| Board funded amortization                                 |         | 21,505    |         | 21,837    |         | 22,871    |             | 24,229    |         | 28,150    |           | 28,150    |         | 28,150    |         | 28,150    |
| Transfer from / (to) capital reserves'                    |         | (1,427)   |         | (8,142)   |         | (3,002)   |             | 25,947    |         | 4,760     |           | -         |         | -         |         | -         |
|   |         | (2,289)   |         | (15,122)  |         | (15,691)  |             | (13,214)  |         | 10,000    |           | -         |         | -         |         | -         |
| <b>Costs to be reduced/efficiencies to identify</b>       |         | -         |         | -         |         | -         |             | -         |         | -         |           | (35,472)  |         | (52,444)  |         | (68,470)  |

## Board-funded (non-facility) capital

### Priorities

Consistent with our values and focus on supporting student learning, the CBE makes decisions every year on needed non-facility capital investments. Those investments focus on enhancing the CBE's learning environment for students and maintaining key CBE systems and infrastructure.

The determination of which projects are funded is informed by the CBE's Three-Year Education Plan and related system priorities. Decision making is delegated to the Capital Budget Council which is headed by the Chief Financial Officer. The council is co-chaired by the Superintendent, Facilities & Environmental Services and has representation from across the organization. Three school-based principals participate on the council. The council evaluates and prioritizes all non-facility capital projects and makes a recommendation to the Chief Superintendent via Superintendents' Team. The recommended projects then form part of the CBE's non-facility capital budget for the year.

The CBE continues to invest resources to ensure that necessary capital investments are being made today that will support the learning environment our students will need in the future. As a result, the CBE is investing \$22.9 million in board-funded (non-facility) capital projects. The CBE does not receive explicit funding from Alberta Education for these capital projects; rather, the CBE must accumulate funds over time from its annual funding. This explains, in part, why operating and capital reserves are so important to the operation of the CBE.

This budget includes projects such as the implementation of a new student information system, wireless upgrades to ensure consistent capacity standard in all schools as well as the replacement of technology devices. These investments that are made today will allow us to maintain and enhance the learning environment that supports student success into the future.

### Background

The budget for capital acquisitions (or non-facility capital) includes technology, furniture, equipment, vehicles and all other non-facility assets.

A portion of the projects typically included in this budget are for the renewal and maintenance of vehicles, equipment, existing technology systems and computer hardware. These projects are categorized as 'maintenance' projects.

'Enhancement' projects are those that expand or improve the functionality of existing systems, technologies and processes. The final category of projects is 'strategic' which open up new horizons, learning methods or organizational models that span the organization.

These capital acquisitions do not reflect capital needs for school buildings and related facility infrastructure. School building and related facility infrastructure are supported by additional capital grants provided by the Provincial Government through a separate capital planning process.

Non-facility capital needs are funded from in-year operating grants or targeted funds, if any. The budget is generally established based on the non-facility amortization expense for the year. The anticipated funding available from amortization for non-facility capital in 2017-18 is \$28.2 million. The capital budget has been reduced by \$10 million in order to balance the overall CBE budget. \$5 million of this reduction will be garnered by reducing the scope and/or number of projects supported and the other \$5 million will be supported by the use of Infrastructure, Maintenance and Renewal funding to continue the work of qualifying projects.

Reserves may also be used to fund capital activities. \$4.8 million of board-funded capital spending will be funded from draws on capital reserves to support the CBE's portion (\$2.2 million) of the gymnasium at Nelson Mandela High School and up to \$2.6 million is for the additional cost of commissioning the Seton High School beyond the funds that have already been identified in the 2016-17 budget.

**2016-17 board-funded (non-facility) capital budget**

The CBE's board-funded capital budget supports both projects that are one-time (e.g. the replacement of the student information system) or capital acquisitions that need to be made on an annual basis to maintain a stable and reliable inventory of technology devices, vehicles and musical instruments. The current board-funded capital plan does include projections of costs for two years in addition to the 2017-18 budget year; however, approvals are made on an annual basis to correspond with the Government budget approval cycle.

The \$22.9 million allocated for non-facility capital will be assigned to project budgets as follows:

|   | Fall Budget<br>2016-17 | Budget<br>2017-18 | Projection<br>2018-19 | Projection<br>2019-20 | Useful life  | Funding source 2017-18                |
|---|------------------------|-------------------|-----------------------|-----------------------|--------------|---------------------------------------|
| (\$ thousands)                                |                        |                   |                       |                       |              |                                       |
| Wireless enhancements                         | 3,500                  | <b>2,228</b>      | -                     | -                     | 4 years      | IMR grant & board-funded amortization |
| Performance contracts                         | 3,765                  | <b>3,292</b>      | 3,292                 | 3,292                 | 10 years     | Board-funded amortization             |
| Student information system                    | 7,735                  | <b>6,984</b>      | 3,000                 | -                     | 4 years      | Board-funded amortization             |
| Technology refresh                            | 5,000                  | <b>5,646</b>      | 5,000                 | 3,000                 | 4 years      | Board-funded amortization             |
| Gymnasium at Nelson Mandela High School       | 2,200                  | <b>2,200</b>      | -                     | -                     | 40 years     | Capital reserves                      |
| Commissioning                                 | 12,083                 | <b>2,560</b>      | -                     | 3,700                 | 5 years      | Capital reserves                      |
| Strategic, enhancement & maintenance projects | 29,107                 | -                 | 16,858                | 18,158                | 3 - 10 years | Board-funded amortization             |
| <b>Total</b>                                  | <b>63,390</b>          | <b>22,910</b>     | <b>28,150</b>         | <b>28,150</b>         |              |                                       |

As noted above, the CBE's Capital Budget Council categorizes, assesses, and recommends for approval non-facility capital projects based on the business and strategic value that they deliver. The categories used are: strategic, enhancement and maintenance. This allows us to monitor our non-facility capital investment mix to ensure that sufficient resources are allocated to maintain and enhance existing capital investment to meet the technological requirements for student learning. It also ensures that the extent of new investment matches the organization's ability to maintain its assets in the future.

The total requests submitted for 2017-18 were in excess of \$47 million – double what the budget will accommodate. These projects have been prioritized by the Capital Budget Council.

**CALGARY BOARD OF EDUCATION  
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| <b>2017-18 Capital Budget Requests</b>                                |                               |                     |
|---|-------------------------------|---------------------|
| <b>Name</b>   | <b>Category</b>               | <b>Request</b>      |
| <b>ONGOING PROJECTS</b>   |                               | <b>\$ thousands</b> |
| Wireless Upgrades   | Maintenance                   | 8,218               |
| Infrastructure Maintenance & Growth                                   | Maintenance                   | 2,306               |
| Client Access Technology Refresh                                      | Maintenance                   | 6,646               |
| Edge Switch Replacement   | Maintenance                   | 2,789               |
| Corporate Performance Management (Hyperion)                           | Enhancement                   | 1,350               |
| Fees Central  | Enhancement or Strategic      | 420                 |
| Two-Factor Authentication   | Strategic                     | 738                 |
| Records Centre Modernization  | Maintenance                   | 750                 |
| Student Information System  | Maintenance                   | 7,984               |
| Musical Instrumentation Standardization                               | Enhancement                   | 695                 |
| On-line Application System and Database                               | Enhancement                   | 87                  |
| Security Cameras  | Enhancement                   | 160                 |
| Integrated Workplace System 5 Year Strategic Plan                     | Strategic                     | 390                 |
| Automated External Defibrillators - elementary schools                | Enhancement                   | 110                 |
| Program Moves and Expansions  | Enhancement                   | 1,100               |
| Fleet Replacement/Additions   | Maintenance                   | 944                 |
| Equipment Replacement/Additions                                       | Maintenance                   | 1,718               |
|   | <b>TOTAL ONGOING REQUESTS</b> | <b>36,405</b>       |
| <b>NEW PROJECTS</b>   |                               |                     |
| New School Commissioning (beyond amounts available in current budget) | Enhancement                   | 2,560               |
| Enterprise Portal Lifecycle Upgrade                                   | Maintenance                   | 1,385               |
| Conference Room Technology Update                                     | Maintenance                   | 44                  |
| iProcurement Implementation   | Enhancement                   | 400                 |
| QuickBooks Replacement  | Enhancement                   | 2,300               |
| Symphony Cloud Implementation   | Maintenance                   | 97                  |
| School Entryway Matting   | Maintenance                   | 600                 |
| School Enhancement Projects (System)                                  | Strategic                     | 2,330               |
| School Enhancement Project  | Strategic                     | 1,500               |
| ATIP Software   | Enhancement                   | 58                  |
|   | <b>TOTAL NEW REQUESTS</b>     | <b>11,274</b>       |
|   | <b>TOTAL REQUESTS</b>         | <b>47,679</b>       |

**BUDGET AVAILABLE**

|  |  |               |
|--|--|---------------|
| Board-funded amortization                                  |  | 28,150        |
| Reduction for balancing                                    |  | (5,000)       |
| Use of reserves for commissioning and the gymnasium @ NMHS |  | 4,760         |
| <b>TOTAL BUDGET AVAILABLE*</b>                             |  | <b>27,910</b> |

\*\$5 million of which must qualify for use of Infrastructure, maintenance and renewal funding which brings the net budget to \$22.9 million.

### Facility (Provincially supported) capital projects

Each year the CBE prepares a Three-Year School Capital Plan for submission to the Provincial Government which is an analysis of the CBE's forecasted school capital needs. We also prepare and submit to the Provincial Government an annual Modular Classroom Plan, which is an analysis of the CBE's forecasted modular classroom needs. The implementation of any of these plans is dependent upon Provincial approval.

The spending for these Provincially funded projects is not included in the CBE's annual budget, as the amortization expense and corresponding recognized revenues are recorded over the useful life of the asset. The annual amortization expense provision and corresponding Alberta Education revenues are incorporated in the budget for all assets in productive use by Aug. 31, 2017. \$39.2 million in amortization expense and corresponding Provincial revenue is included in the 2017-18 budget for these assets.

At the time this report was written, the following facility-related projects have been approved by the Provincial Government and are in various stages of completion:

| Name                                   | Type                     | Grant funding     | Board-funded / reserves estimated cost* | Completion date |
|--|--------------------------|-------------------|---|-----------------|
|  |                          | (in \$ thousands) |   |                 |
| Marshall Springs School                | New school – middle      | 24,848            | 1,263                                   | Fall 2017       |
| Manmeet Singh Bhullar School           | New school - elementary  | 14,678            | 908                                     | Fall 2017       |
| Gymnasium @ Nelson Mandela High School | Gymnasium                | 4,300             | 2,200                                   | TBD             |
| Ron Southern School                    | New school - elementary  | 15,450            | 908                                     | Fall 2017       |
| Rosedale School modulars               | Replacement modulars     | TBD               | 130                                     | Fall 2017       |
| Griffith Woods School                  | New school – K – 9       | 27,131            | 1,646                                   | January 2018    |
| Seton High School                      | New school – high school | 61,160            | 4,115                                   | Fall 2018       |
| James Fowler High School               | Modernization            | 20,002            | 730                                     | Fall 2018       |
| Lord Beaverbrook High School           | Modernization            | 30,013            | 730                                     | Fall 2018       |
| Coventry Hills / Country Hills Village | New school - elementary  | TBD               | TBD                                     | 2021            |
| Cranston                               | New school – elementary  | TBD               | TBD                                     | 2021            |
| Evergreen                              | New school – elementary  | TBD               | TBD                                     | 2021            |
| Forest Lawn High School                | Modernization            | TBD               | TBD                                     | 2021            |

\*Board-funded or reserve-funded commissioning costs are for spending **up to** the amounts indicated. Where savings are possible, the funds will be redirected into future commissioning needs.

## Debt obligations

The CBE has entered into three types of debt obligations, which incur interest charges on outstanding balances. Legally the CBE is permitted to borrow up to whatever limit the Minister of Education approves for long-term debt.

### Line of credit

The CBE has a line of credit with a zero per cent interest rate. The sum is limited to the balance in Accounts Receivable from the prior year's financial statements. The line of credit has not been used as at August 31 of the last two fiscal years.

### Provincially supported debt

The Province of Alberta funds the outstanding debt on school building projects. The annual debt owing is paid directly by Alberta Education to the Alberta Capital Finance Authority. The debt transactions and corresponding funding from Alberta Education are required to be recorded in our financial statements.

| Supported debt         | Actuals | Actuals | Fall Budget | Budget  | Forecast | Forecast |
|------------------------|---------|---------|-------------|---------|----------|----------|
|                        | 2014-15 | 2015-16 | 2016-17     | 2017-18 | 2018-19  | 2019-20  |
| in \$ thousands        |         |         |             |         |          |          |
| Debt owed at August 31 | 4,911   | 2,936   | 1,383       | 542     | 246      | -        |
| Interest expense       | 561     | 257     | 273         | 128     | 52       | 24       |

### Capital leases

Capital leases are approved by the Minister of Education for internally financed projects. All capital leases are secured by identified assets of the CBE (restricted cash). The CBE has set aside restricted long-term investments to retire the outstanding lease obligations.

| Capital leases         | Actuals | Actuals | Fall Budget | Budget  | Forecast | Forecast |
|------------------------|---------|---------|-------------|---------|----------|----------|
|                        | 2014-15 | 2015-16 | 2016-17     | 2017-18 | 2018-19  | 2019-20  |
| in \$ thousands        |         |         |             |         |          |          |
| Debt owed at August 31 | 8,088   | 10,181  | 6,889       | 4,414   | 2,723    | 2,164    |
| Interest expense       | 454     | 236     | 251         | 163     | 92       | 48       |

## Post-employment and post-retirement benefit obligations

The CBE has a number of defined benefit plans providing post-employment and post-retirement benefits for supplementary health care, dental care, life insurance and retiring allowances (collectively "Post-Retirement and Post-Employment Benefits Plans"). These plans are not funded by separately designated plan assets. For those plans the future benefits cost is actuarially determined using the projected unit credit method pro-rata on service and using management's best estimate of expected salary escalation, termination and retirement rates and mortality. The discount rate used to measure obligations is based on the internal cost of borrowing.

For the last two years, the obligation has stayed at \$24 million with annual costs of \$3.7 million.

[cbe.ab.ca](http://cbe.ab.ca)



## IV. Informational

The Informational section includes a range of information that may be of interest to some readers to better understand the context and environment within which the CBE operates.

Information included in this section includes enrolment projection methodology and data, staffing complement details, debt information, student results and property tax information from the City of Calgary.

## Student enrolment

### Enrolment forecasting methodology

Enrolment is counted on September 30 of each year. [An annual report](#) is then presented to the Board of Trustees to provide a snapshot of actual September 30 enrolment. Projections are made for the upcoming school year and two subsequent years based on City of Calgary population changes, market share and student retention rates, new school openings and pre-school census.

The CBE uses the Cohort-Survival methodology in preparing enrolment projections. The cohort survival projection methodology uses historic birth data and historic student enrolment data to “age” a known population (cohort) through their school grades. The cohort survival ratio is calculated to see how a group of potential students first enter the system at kindergarten and Grade 1 (market share) and how this group of students grows or shrinks over time (retention rates). Enrolment patterns emerge that are used for projections.

The CBE uses pre-school census information, which is collected annually for all communities, combined with historic intake rates at kindergarten and Grade 1 to project how many students will enter our system each year. The annual September 30 enrolment data is used as a base for establishing retention rates that are used to project how existing student populations move through the system from one year to the next.

City of Calgary population projections are not a direct factor in CBE’s enrolment projections but they do provide context for comparison. Trends reported by the City with respect to net migration and natural increase (births minus deaths) are considered when evaluating future student growth.

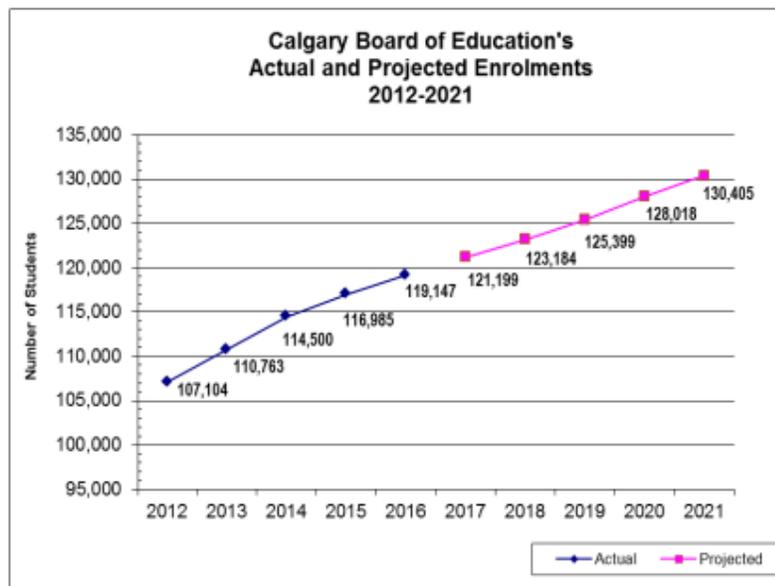
The opening of new schools typically increases CBE’s intake rates. 16 new schools opened in the 2016-17 school year and four more will open for the 2017-18 year.

CBE’s current enrolment of 119,147 students is forecast to increase to 121,200 in 2017-18 and 130,405 students by September, 2021. An increase of 11,257 students is projected averaging approximately 2,250 additional students annually. Taking into consideration the current economic situation and expectations of a lower level of net migration into the City, CBE is projecting growth between 1.6 and 2.1 per cent over the next five years. The largest increase over this five-year timeframe is projected to be in Division II (Grades 4-6) and Division III (Grades 7-9).

### Current and projected enrolment numbers

Enrolment historical actuals and projections are as follows. See the end of this section for school-by-school enrolment projections by grade and program.

| Enrolment by program      | Actual         | Actual         | Actual         | Projection     | Projection     | Projection     | Projection     |
|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                           | 2014-15        | 2015-16        | 2016-17        | 2017-18        | 2018-19        | 2019-20        | 2020-21        |
| Grades 1-6                | 51,253         | 53,329         | 55,122         | 56,393         | 57,733         | 58,315         | 58,558         |
| Grades 7-9                | 22,237         | 22,624         | 23,292         | 24,076         | 24,998         | 26,189         | 27,424         |
| Grades 10-12              | 26,420         | 26,375         | 26,442         | 25,880         | 25,809         | 26,121         | 27,001         |
| Pre-K and Kindergarten    | 9,389          | 9,389          | 9,298          | 9,759          | 9,464          | 9,510          | 9,675          |
| Chinook Learning Services | 2,393          | 2,327          | 2,219          | 2,259          | 2,298          | 2,335          | 2,378          |
| Outreach Programs         | 1,281          | 1,384          | 1,337          | 1,366          | 1,390          | 1,412          | 1,438          |
| Unique Settings           | 690            | 676            | 729            | 745            | 758            | 770            | 784            |
| Cbe-Learn                 | 589            | 611            | 459            | 468            | 476            | 484            | 493            |
| Home Education            | 248            | 270            | 249            | 254            | 259            | 263            | 268            |
| <b>Total</b>              | <b>114,500</b> | <b>116,985</b> | <b>119,147</b> | <b>121,200</b> | <b>123,185</b> | <b>125,399</b> | <b>128,018</b> |
| Total annual change       |                | 2,485          | 2,162          | 2,053          | 1,985          | 2,214          | 2,619          |
| Total % change            |                | 2.2%           | 1.8%           | 1.7%           | 1.6%           | 1.8%           | 2.1%           |



Note: Enrolment includes Home Education, Outreach/Unique Settings, Chinook Learning and CBeLearn.

## School planning

### New school planning

Each year school boards submit a Three-Year School Capital Plan to Alberta Education by April 1. The Calgary Board of Education doesn't decide when new schools are built. The Provincial Government determines where and when new schools are built.

The Calgary Board of Education's [Three-Year School Capital Plan 2017-2020](#) requested 19 new schools and 10 major modernizations from the Provincial Government. This plan identifies a single prioritized capital list consisting of both new school construction and major modernization requests, as required by Alberta Education. The plan identifies priorities for new school construction and major modernizations based on criteria approved by the Board of Trustees.

### Program changes and managing space for students

To manage the space we have for students in our schools, we make adjustments to program offerings or designations, anticipate capacity issues, monitor and develop transportation solutions and prioritize new school construction and school closure considerations based on student populations, programming, and community needs.

Our [Three-Year System Student Accommodation Plan](#) identifies schools and communities facing accommodation challenges over the next three years, and our plans to manage those challenges.

There are several possible situations that may occur in a school community for us to initiate an engagement with parents, students, staff and other interested stakeholders.

These situations may include:

- changes to the communities the school serves
- changes to the grades offered in the school
- the school or a program offered at the school is being considered for closure
- changes to the location or delivery of programs

Decisions about student accommodation take into account input and feedback from parents, students, school staff, community members and any others who could be affected. CBE administration is responsible for making decisions about how space is managed within our schools to educate students.

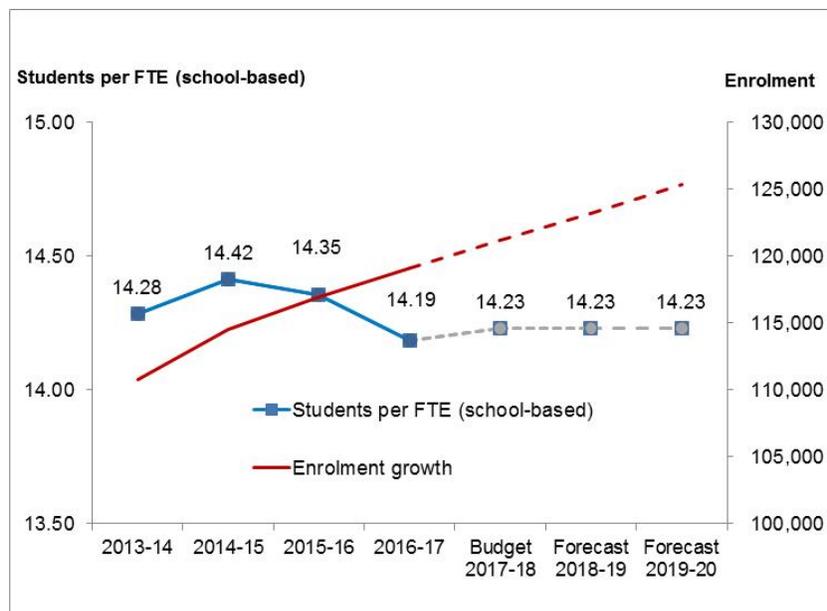
The Board of Trustees is responsible for making decisions where the recommendation involves a consideration of closure.

### Staffing and Full Time Equivalent (FTEs)

The CBE spends the greatest proportion of the budget (77 per cent) on salaries and benefits with certificated staff (teachers) making up the majority of that total. The provincial grant rate increase in recent years has not been sufficient to keep up with enrolment growth and to cover the negotiated rate increases and movement up the salary grid for teachers and support staff. As a result the number of full time equivalent (FTEs) has not been increasing at a rate equal to enrolment growth. In 2017-18, we anticipate the ratio to increase slightly.

The following table shows the average number of CBE students per full time equivalent staff position.

#### School-based staff



More than 14,000 people work for the CBE, which equates to 10,050 FTE positions budgeted in 2017-18; consequently, the CBE is a major contributor to economic activity in the City of Calgary. In all approximately 77 per cent of the CBE's budget is returned to the community in the form of salaries and benefits for our staff.

Each one of our employees plays an important role in providing personalized learning. Teachers, principals and school-based employees work with students to unlock their passions and potential. They are supported by knowledgeable employees who work in a variety of other service units supporting our students and their learning.

RAM spring staffing decisions were being made when this report was written. Therefore, FTEs disclosed are projections and actual fall staff deployed may differ. Typically staffing levels fluctuate throughout the year as student populations and needs change.

Staffing levels do not have a reliable correlation with the opening of new schools. A new school will require a principal and administrative staff; however, increase in central supports and maintenance are contingent on student need and budget availability.

### Budgeted FTEs by bargaining unit

|   | 2013-14      | 2014-15      | 2015-16      | 2016-17      | 2017-18       |
|---|--------------|--------------|--------------|--------------|---------------|
| Alberta Teacher Association (ATA)         | 5,990        | 6,129        | 6250         | 6,451        | 6,543         |
| Staff Association (SA & PSS)              | 2,324        | 2,377        | 2470         | 2,534        | 2,554         |
| Canadian Union of Public Employees (CUPE) | 632          | 637          | 636          | 673          | 664           |
| Exempt Employees                          | 212          | 208          | 205          | 218          | 204           |
| Trades                                    | 87           | 93           | 91           | 95           | 85            |
| <b>Total</b>                              | <b>9,245</b> | <b>9,444</b> | <b>9,652</b> | <b>9,971</b> | <b>10,050</b> |

### 2015-16 CBE Results

Calgary Board of Education students achieved high standards on the 2015-16 Provincial Achievement Tests and Diploma Exams once again.

CBE students in Grades 6 and 9 outperformed the Province at the acceptable standard and the standard of excellence on 18 out of 20 measures. Students' results on diploma exams are also impressive. In 10 of 11 exams CBE students outperformed the Province at the acceptable standard and the standard of excellence.

Some improvements have been noted in math, and this subject continues to be an area of focus. Overall improvement in Knowledge and Employability Courses is also identified as an area for continued attention.

Provincial achievement testing is one of several ways the CBE measures student success. Other measures include report card data, student survey data and the Province's Accountability Pillar.

The full Annual Education Results Report 2015-16 is included at the end of this section.

## **2017-18 Fees information**

Fee rates planned for 2017-18 and communicated in this report are subject to Ministerial approval. In the event that fees are approved at different rates, the budget changes will be reflected in the CBE's Fall Budget Update.

### **Bill 1**

As discussed elsewhere in this report, the introduction of Bill 1: An Act to Reduce School Fees is having an impact on the CBE's 2017-18 budget.

Under Bill 1 the CBE will receive funding to replace fees previously charged to some families. School boards will no longer be permitted to charge fees for instructional supplies and materials. Included in this category are fees for:

- textbooks
- workbooks
- photocopying
- printing and paper supplies
- any common fees charged to an entire student body or grade cohort

Bill 1 also requires school boards to eliminate or reduce fees for students who attend their designated community school for a Regular Program, and reside more than 2.4 kilometres from the school. Fees may still be incurred for students attending programs of choice or who take the bus and live within 2.4 kilometres from school. We will be offering service for elementary students residing 1.6 kilometres from the school and for middle/junior high students living greater than 1.8 kilometres from the school.

Under Bill 1 school boards will submit their fee plan to the Ministry of Education in advance of the school year. Work is currently underway on this process.

The Provincial Government is currently working on the development of the regulations that will support Bill 1. The School Fee Regulation is anticipated to be in force in June, 2017. Representatives from the CBE have participated in several engagement sessions focused on informing the regulations.

At the date of this report we do not have access to the regulations that will underpin Bill 1. In the absence of that specific direction we have made a number of estimates and assumptions. Those estimates and assumptions are subject to change as final information becomes available.

### **Grant received in lieu of fees**

The CBE is working collaboratively with the Provincial Government to reduce fees in accordance with Bill 1 to make life more affordable for families. We are reviewing all of our fees to ensure they are aligned with students, families and to government expectations.

Approximately \$18.3 million will be received from the Provincial Government as a grant in lieu of collecting instructional supplies and materials and transportation fees for students who qualify for fee-free or rebated transportation. That grant has been applied fully towards the reduction of fees.

| (in \$ thousands)                      | <b>Before Bill 1<br/>changes</b> | <b>Bill 1<br/>changes</b> | <b>2017-18<br/>Budget</b> |
|--|----------------------------------|---------------------------|---------------------------|
| <b>Alberta Education grant revenue</b> |                                  |                           |                           |
| Transportation                         | 34,266                           | 7,870                     | 42,136                    |
| Instructional supplies & materials     | -                                | 10,390                    | 10,390                    |
| Noon supervision                       | n/a                              | n/a                       | n/a                       |
|  | <u>34,266</u>                    | <u>18,260</u>             | <u>52,526</u>             |
| <b>Fee revenue</b>                     |                                  |                           |                           |
| Noon supervision                       | 13,965                           | n/a                       | 13,965                    |
| Transportation                         | 13,800                           | (7,870)                   | 5,930                     |
| Instructional supplies & materials     | 10,390                           | (10,390)                  | -                         |
|  | <u>38,155</u>                    | <u>(18,260)</u>           | <u>19,895</u>             |

## Fees information

The charging of fees is governed by the School Act and its regulations and by the CBE's Administrative Regulation 7005: Student Fees. Further, the calculation of CBE fees is informed by the Report to the Minister dated October 2012 submitted by Keates and van Tamelen (known as "the Ministerial Report on Fees").

The charging of fees is guided by the CBE's values:

- Students come first
- Learning is our central purpose
- Public education serves the common good

These values result in the CBE directing the maximum amount of dollars towards student learning during its budget process. Also, the CBE ensures that no child is denied access to an education due to the inability to pay fees.

Since the 2012-13 budget year CBE administration has been delegated responsibility for establishing the various fee rates by the Board of Trustees. The Board's approval of fees is accomplished through the approval of the annual budget.

Information included in this note supports Operational Expectation 5: Financial Planning.

Historical levels for the system-wide fees have been:

|  | 2016-17  | 2015-16  | 2014-15   | 2013-14   | 2012-13   | 2011-12   |
|--|----------|----------|-----------|-----------|-----------|-----------|
|  | (in \$)  |          |           |           |           |           |
| <b>Noon Supervision Fees</b>               |          |          |           |           |           |           |
| Non bused students                         | 255 -285 | 255 -285 | 250 - 280 | 200 - 220 | 185 - 230 | 240 - 295 |
| Bused students                             | 255 -285 | 255 -285 | 250 - 280 | 135 - 145 | 65 - 80   | -         |
| <b>Transportation Fees – Charter Buses</b> |          |          |           |           |           |           |
| Kindergarten                               | 335      | 300      | 330       | 215       | 215       | 215       |
| Elementary                                 | 335      | 300      | 330       | 295       | 295       | 295       |
| Junior High                                | 335      | 300      | 330       | 295       | 295       | 335       |
| <b>ISM</b>                                 |          |          |           |           |           |           |
| Kindergarten                               | 15       | 15       | 15        | 15        | 15        | 15        |
| Elementary                                 | 30       | 30       | 30        | 30        | 30        | 30        |
| Junior High                                | 137      | 137      | 137       | 105       | 105       | 105       |
| Senior High                                | 152      | 152      | 152       | 132       | 132       | 132       |

## Analysis

### Fees Calculation & Reporting

The two fees that the CBE centrally manages and reports on are noon supervision and transportation. The setting of these fees takes into consideration the full costs associated with the program or service including the costs of unpaid fees and waivers and the number of students projected to participate in the programs or services. The setting of the fees also takes into account the intangible costs (for example, waivers etc.) to the parent population.

### Waivers

The CBE provides parents and independent students with a mechanism to have centrally managed fees waived. The availability of waivers meets the CBE value that no child be denied access to an education due to the inability to pay fees.

Fees can be waived for two reasons. The first reason is for a low family income and this must be demonstrated in one of four ways:

- if you receive assistance from Provincial Social Services
- if your family is eligible for the Alberta Child Health Benefit
- if you are a Government Sponsored Convention Refugee
- if you do not have the documents listed above but have a low income and Treaty Status

If families do not meet the criteria above, they may declare a financial hardship to their school principal. Their principal will work with them to either come up with a manageable payment schedule or to waive part or all of the fees.

### Unpaid Fees & Collections

For the unpaid amounts for transportation, noon supervision, and prior years ISM fees, schools will be centrally supported and their individual budgets will not be directly impacted.

**CALGARY BOARD OF EDUCATION  
BUDGET 2017–18**

The accounts of parents who owe transportation, noon supervision or prior year ISM fees and any charges related to payments resulting in non-sufficient funds (NSF) are sent to collections. The minimum amount that needs to be outstanding before an account is sent to collection varies by fee. For prior years ISM it was \$15; for noon supervision and transportation it was \$25.

An external collection agency is contracted by the CBE to perform the collection duties. The agency is compensated at a rate of 14 per cent of the amount that is recovered on the account. If an account has already been sent to collections and the account holder pays the CBE, the collection agency still receives a fee for the amount collected.

**Noon Supervision Fees** *(subject to Ministerial approval)*

- Noon supervision fees are charged to cover the costs related to the supervision of children in full day kindergarten and Grades 1 to 6. The costs are incurred primarily in schools and relate to lunchroom supervisors and lead lunchroom supervisors levels A to B depending on principal decisions.
- Centralized costs are included in the fee (absence relief in schools and registration and fee collection costs, noon supervision co-ordination costs).

|                      | 4 day   |         |       | 4/5 day |         |       | 5 day   |         |       |
|----------------------|---------|---------|-------|---------|---------|-------|---------|---------|-------|
|                      | 2017-18 | 2016-17 | % var | 2017-18 | 2016-17 | % var | 2017-18 | 2016-17 | % var |
| Noon Supervision Fee | \$255   | \$255   | -     | \$275   | \$275   | -     | \$285   | \$285   | -     |

**Transportation Fees** *(subject to Ministerial approval)*

| Charter rates  | 2017-18 | 2016-17 | % var |
|--|---------|---------|-------|
| Students greater than 2.4 km from regular program, designated school   | \$0     | \$335   | (100) |
| Students less than 2.4 km from regular program (elementary students living between 1.6 – 2.4km from school and middle/junior high students living 1.8 – 2.4km from school), designated school and students attending alternative program | \$335   | \$335   | -     |

**Instructional Supplies and Materials Fees** *(subject to Ministerial approval)*

- ISM fees will not be charged in the 2017-18 school year in accordance to the School Act.

| ISM fees     | 2017-18 | 2016-17 | % var |
|--------------|---------|---------|-------|
| Kindergarten | \$0     | \$15    | (100) |
| Elementary   | \$0     | \$30    | (100) |
| Junior High  | \$0     | \$137   | (100) |
| Senior High  | \$0     | \$152   | (100) |

**Fee rates** *(subject to Ministerial approval)*

The following is a list of fees for the 2017-18 school year for the Calgary Board of Education, with comparative information presented for the 2016-17 school year.

**1. Instructional Supplies and Materials Fee**

| <b>Instructional Supplies and Materials Fees</b> | <b>2017-18</b> | <b>2016-17</b> |
|--|----------------|----------------|
| Kindergarten (Half day)                          | \$0            | \$15           |
| Kindergarten (Full day program when offered)     | \$0            | \$30           |
| Elementary (Grades 1 to 6)                       | \$0            | \$30           |
| Junior High (Grades 7 to 9)                      | \$0            | \$137          |
| Senior High (Grades 10 to 12)                    | \$0            | \$152          |
| <b>Refundable Security Deposit</b>               | <b>2017-18</b> | <b>2016-17</b> |
| Junior High (Grades 7 to 9)                      | \$50           | \$50           |
| Senior High (Grades 10 to 12)                    | \$50           | \$50           |

**2. Transportation Fees**

| <b>Calgary Transit</b>  | <b>2017-18</b>                           | <b>2016-17</b> |
|---|--|----------------|
| Eligible Transit  |  |                |
| Students greater than 2.4 km from regular program, designated school  | \$15.10 monthly<br><i>(after rebate)</i> | \$65 monthly   |
| Ineligible Transit  | \$70 monthly                             | \$65 monthly   |
| Students less than 2.4 km from regular program, designated school and students attending a program of choice        |  |                |
| <b>Yellow Bus Service</b>   |  |                |
| Students greater than 2.4 km from regular program, designated school and students with complex transportation needs | \$0                                      | \$335          |
| Students less than 2.4 km from regular program, designated school and students attending a program of choice        | \$335                                    | \$335          |

### 3. Elementary Noon Supervision

| Conditional riders and kindergarten (full-day) and Grades 1 to 6 | 2017-18 | 2016-17 |
|--|---------|---------|
| 4 day program  | \$255   | \$255   |
| 4/5 day program  | \$275   | \$275   |
| 5 day program  | \$285   | \$285   |

### 4. Musical Instrument Registration Fees

| All Programs | 2017-18 | 2016-17 |
|--------------|---------|---------|
| Annual       | \$100   | \$100   |

### 5. Non-Resident Student Fees

#### (i) Non-Resident (of Alberta) Fees

*(Entitled under Section 8 of the School Act)*

Non-resident (of Alberta) fees reflect actual school year costs. The following basic fees represent the projected average cost per student of the programs offered:

| Non-Resident Student Fees                               | 2017-18     | 2016-17     |
|---|-------------|-------------|
| Kindergarten  | \$4,620     | \$4,620     |
| Elementary  | \$9,235     | \$9,235     |
| Junior High   | \$7,800     | \$7,800     |
| Senior High School - Other Programs                     | \$8,135     | \$8,135     |
| Students with Exceptional Needs Add:                    |             |             |
| Mild or Moderate Disabilities                           | \$4,275     | \$4,275     |
| Severe Disabilities                                     | \$15,360    | \$15,360    |
| English Language Learner Basic Support                  | \$1,160     | \$1,160     |
| Specialized Individual Student Costs (if provided) add: |             |             |
| Education Assistant (1.0 FTE – 10 month)                | \$60,436    | \$60,436    |
| Transportation  | Actual Cost | Actual Cost |
| Institutions  | Actual Cost | Actual Cost |

Fees related to students with special needs, or for a requested specialized individual educational program or for a part-time program, are determined on request on an individual basis. No non-resident (of Alberta) students have attended CBE schools since the 2003-04 school year.

#### (ii) Non-Resident (of Canada) Fees

*(Not entitled under Section 8 of the School Act)*

The following annual mandatory fees per non-resident (of Canada) students for 2017-18 (inclusive of English language support, as required) are recommended:

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|   | 2017-18  | 2016-17  |
|---|----------|----------|
| Non-refundable application fee  | \$250    | \$250    |
| *Grade 1 – Grade 12 (full year and full day Kindergarten where offered)   | \$12,000 | \$11,000 |
| *Kindergarten (full year, half day)                                       | \$6,000  | \$5,500  |
| *Senior High - Grades 10-12 (one semester only)                           | \$6,000  | \$5,700  |
| Monthly Fee (grades 1 to 12) (no credit granted on auditing of course(s)) | \$1,300  | \$1,200  |
| Refund processing service charge  | \$250    | \$250    |

\*Fees are set in accordance with market factors in reference to competing programs in the world and within Canada. Further, fees aligned with Edmonton Public jurisdiction due to similarity in programming. Fee levels are published with agents one year prior to the year of registration.

**6. Chinook Learning Services – Under 20 Years of Age Academic Fees**

|   | 2017-18 | 2016-17 |
|---|---------|---------|
| <b>Course Fees for Students Under 20 Years of Age as of Sept. 1, 2017</b>                                       |         |         |
| A non-refundable Instructional Supplies and Materials Fee per course  | \$0     | \$65    |
| Learning Resources Rental Fee, including a refundable learning resource Security Deposit of \$60 (2016-17 \$60) | \$60    | \$85    |

**7. Chinook Learning Services – Over 20 Years of Age Adult Academic Fees**

Students who are 20 years of age or older (as at Sept.1, 2017), and enrolled with Chinook Learning Services will be required to pay course fees and learning resources rental fees as approved, for academic courses, as follows:

Chinook Learning fees are based on a cost recovery model.

|   | 2017-18 | 2016-17 |
|---|---------|---------|
| <b>Course Fees for Students Over 20 Years of Age</b>  |         |         |
| A non-refundable Instructional Supplies and Materials Fee per course  | \$65    | \$65    |
| Learning Resources Rental Fee, including a refundable learning resource Security Deposit of \$60 (2016-17 \$60) | \$60    | \$85    |
| 8 credit Classroom Learning daytime courses   | \$545   | \$545   |

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|  |         |         |
|--|---------|---------|
| 5 credit Classroom Learning daytime courses                            | \$545   | \$545   |
| 5 credit Self-Directed Learning and Classroom Learning evening courses | \$480   | \$480   |
| 3 credit Classroom Learning daytime courses                            | \$355   | \$355   |
| 3 credit Self-Directed Learning and Classroom Learning evening courses | \$295   | \$295   |
| <b>Course Fees for Diploma Exam Preparation</b>                        |         |         |
| Power Week - 15 hours of instruction                                   | \$165   | \$165   |
| Power Weekend – 15 hours of instruction                                | \$165   | \$165   |
| <b>*Course Fees for International Students</b>                         |         |         |
| 8 – credit courses   | \$1,840 | \$1,840 |
| 5 – credit courses   | \$1,150 | \$1,150 |
| 3 – credit courses   | \$690   | \$690   |

**8. CBe-learn Fees**

These fees apply to students who are 19 years of age or younger (as at Sept. 1, 2017) who are only taking CBe-learn courses and who are not registered at any other Calgary Board of Education school or program of studies. These students enrolled in CBe-learn will be required to pay the following fees per course:

|   | 2017-18 | 2016-17 |
|---|---------|---------|
| <b>CBe-learn Registration Fees</b>  |         |         |
| <b>Junior High Fees</b>   |         |         |
| <b>CBe-learn students (not attending another CBE school)</b>                |         |         |
| A non-refundable Instructional Supplies and Materials Fee per school year   |         |         |
| Maximum   | \$0     | \$137   |
| First course  | \$0     | \$86    |
| Two courses   | \$0     | \$129   |
| Full-time access  | \$0     | \$137   |
| <b>Senior High Fees</b>   |         |         |
| <b>Students age 19 years and younger (not attending another CBE school)</b> |         |         |
| A non-refundable Instructional Supplies and Materials Fee per course        |         |         |
| Maximum   | \$0     | \$195   |
| First course  | \$0     | \$65    |
| Two courses   | \$0     | \$130   |
| Three courses   | \$0     | \$195   |

**Students under 20 (attending any other non-CBE school)**

A non-refundable Instructional Supplies and Materials Fee per credit

|   |      |       |
|---|------|-------|
| One credit course   | \$0  | \$30  |
| Three credit course   | \$0  | \$90  |
| Five credit course  | \$0  | \$150 |
| Learning Resources Rental Fee, including a refundable learning resource Security Deposit of \$50 (2016-17 \$50) | \$50 | \$85  |

**9. CBe-learn Age 20 and over Course Fees and non-resident fees**

Students who are 20 years of age or older (as at Sept.1, 2017) or non-resident and enrolled with CBe-learn will be required to pay fees, as follows:

|   | <b>2017-18</b> | <b>2016-17</b> |
|---|----------------|----------------|
| <b>Students over 20</b>   |                |                |
| 5 – credit courses  | \$480          | \$480          |
| 3 – credit courses  | \$295          | \$295          |
| Learning Resources Rental Fee including a refundable learning resources security deposit of \$50 (2016-17 - \$50) | \$85           | \$85           |
| <b>Out of province (non-resident of Alberta)</b>  |                |                |
| Per course  | \$870          | \$870          |
| <b>*International student (non-resident of Canada)</b>  |                |                |
| 5 – credit courses  | \$1,150        | \$1,150        |
| 3 – credit courses  | \$690          | \$690          |

\*Fees in alignment with Chinook Learning Services.

**10. Student Parking Fee (annual)**

High schools are permitted to charge students a parking fee for those students wishing access to on-site parking at schools.

|                    | <b>2017-18</b> | <b>2016-17</b> |
|--------------------|----------------|----------------|
| Maximum annual fee | \$40           | \$40           |

## Tax revenue

The CBE receives 93 per cent of its revenue via grants from the Province of Alberta. The Province, in turn, generates revenue from many sources including personal and corporate income tax, property tax from municipal districts resource revenue and federal transfers.

The Province sets the mill rates for the education portion of property tax collected in Alberta. Education property tax rates will be frozen for 2017-18. The residential/farmland rate will remain at \$2.48 per \$1,000 of equalized assessment and the non-residential rate will remain at \$3.64.<sup>6</sup>

Property assessment is performed at the Municipal Government level. The City of Calgary conducts assessments each year that reflect the market value for the property or the typical net annual rental rate for businesses as at July 1 of the previous year, as provisioned by the Municipal Government Act.

Some summary information has been provided to illustrate property taxes collected in the City of Calgary.

Residential and non-residential property tax revenues reported and planned for the City of Calgary are summarized below:

Data from City of Calgary on property taxes  
in \$ thousands

| Actuals   |           |           |           | Budget    |           |           |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 2012      | 2013      | 2014      | 2015      | 2016      | 2017      | 2018      |
| 1,161,100 | 1,300,300 | 1,376,000 | 1,546,000 | 1,659,000 | 1,820,000 | 1,983,000 |

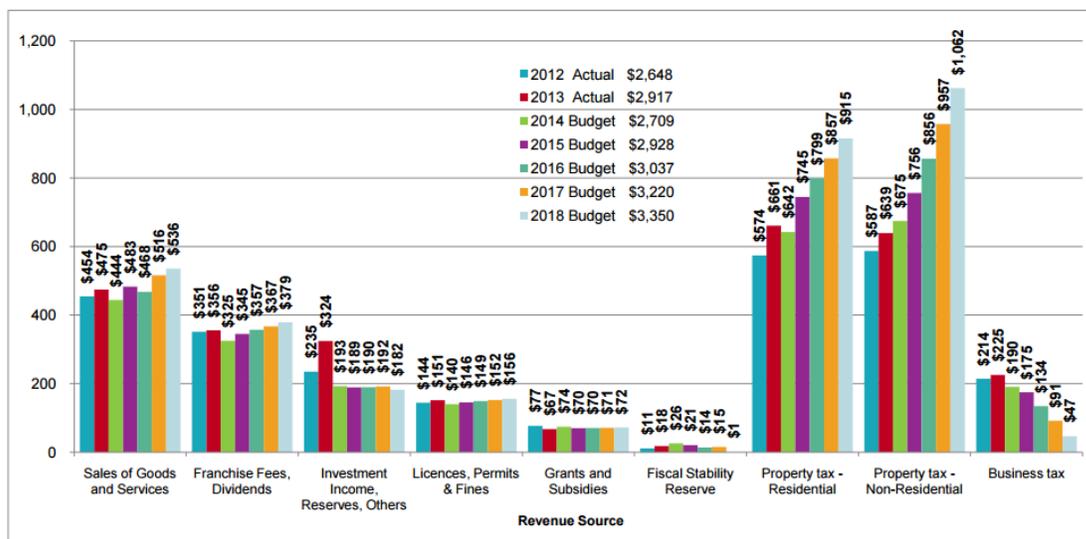
Sources: City of Calgary Action Plan 2015 - 2018 and 2015 Year End Report

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<sup>6</sup> Alberta Budget 2017: Working to make life better

# CALGARY BOARD OF EDUCATION BUDGET 2017-18

Data from City of Calgary on funding the 2015-16 Operating Budget – Tax-Supported  
in \$ millions



- Reliance on property tax as a revenue source is increasing, from 43.9 per cent in 2012 to 59.0 per cent in 2018, partially due to business tax consolidation.
- Business tax as a share of tax-supported revenues is declining, from 8.1 per cent in 2012 to 1.4 per cent in 2018, mainly due to business tax consolidation.
- Grants and subsidies as a portion of tax-supported revenue are declining slightly, from 2.9 per cent in 2012 to 2.2 per cent in 2018.
- 2014 budget as at 2014 June 30 and reflects removal of the provincial property tax.

Data from City of Calgary on Tax Revenue  
in \$ millions

|   | 2012<br>Actual | 2013<br>Actual | 2014<br>Budget | 2015<br>Budget | 2016<br>Budget | 2017<br>Budget | 2018<br>Budget |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| <b>Net Expenditures</b>                   |                |                |                |                |                |                |                |
| Total Budgeted Tax-Supported Expenditures | 2,614.7        | 2,906.8        | 2,708.4        | 2,927.9        | 3,036.6        | 3,219.7        | 3,349.5        |
| Less: Non-tax Revenue                     | (1,239.4)      | (1,381.1)      | (1,200.9)      | (1,252.8)      | (1,247.1)      | (1,313.7)      | (1,325.2)      |
| <b>Net Tax-Supported Expenditures</b>     | <b>1,375.3</b> | <b>1,525.7</b> | <b>1,507.5</b> | <b>1,675.2</b> | <b>1,789.5</b> | <b>1,906.0</b> | <b>2,024.4</b> |
| <b>Tax Revenue</b>                        |                |                |                |                |                |                |                |
| Business Tax: Base at beginning of year   | 208.8          | 214.2          | 186.0          | 168.7          | 129.9          | 88.7           | 44.8           |
| Business Tax: Growth in base              | 5.4            | 11.2           | 4.5            | 6.0            | 4.4            | 2.7            | 1.8            |
| <b>Business Tax Total</b>                 | <b>214.2</b>   | <b>225.4</b>   | <b>190.5</b>   | <b>174.7</b>   | <b>134.3</b>   | <b>91.4</b>    | <b>46.6</b>    |
| Property Tax: Base at beginning of year   | 1,066.6        | 1,161.1        | 1,291.2        | 1,393.3        | 1,545.3        | 1,700.8        | 1,861.2        |
| Property Tax: Growth in base              | 18.5           | 20.9           | 18.5           | 45.1           | 39.5           | 39.3           | 36.4           |
| Property Tax: Rate Increase               | 76.0           | 118.2          | 59.4           | 62.1           | 70.4           | 74.5           | 80.2           |
| One-time Rebate                           | 0.0            | 0.0            | (52.1)         | 0.0            | 0.0            | 0.0            | 0.0            |
| <b>Property Tax Total</b>                 | <b>1,161.1</b> | <b>1,300.3</b> | <b>1,317.0</b> | <b>1,500.5</b> | <b>1,655.2</b> | <b>1,814.6</b> | <b>1,977.8</b> |
| <b>TOTAL TAX REVENUE</b>                  | <b>1,375.3</b> | <b>1,525.7</b> | <b>1,507.5</b> | <b>1,675.2</b> | <b>1,789.5</b> | <b>1,906.0</b> | <b>2,024.4</b> |

- Municipalities in Alberta are required under the Municipal Government Act to balance their operating budgets.
- This schedule shows the sources of tax revenue that fund The City's tax-supported budgeted net operating expenditures:
  - The base at the beginning of the year is the amount of tax that would be collected if no changes to either the tax rate or tax base occurred in that year.
  - The growth in the base is the additional tax revenue collected resulting from the increase in the physical stock of residential and non-residential space.
  - The rate increase is the additional tax revenue collected resulting from Council's property tax rate.

Sources: [City of Calgary Action Plan 2015-18](#) and 2015 Year End Report

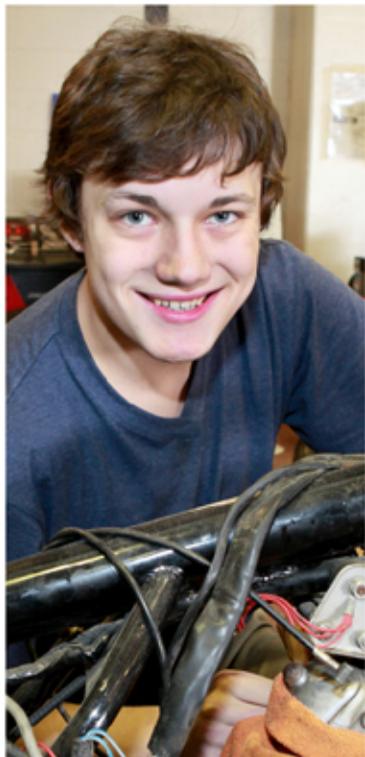
## Glossary of terms and acronyms

|                                    |   |
|------------------------------------|---|
| Alberta Education revenue          | All funds received from Alberta Education, including amortization of Alberta Education-funded facilities. This is sometimes referred to as Provincial funding.  |
| Alternative programs               | Section 21(1) of the Alberta School Act defines alternative programs as, “an education program that (a) emphasizes a particular language, culture, religion or subject matter, or b) uses a particular teaching philosophy.” CBE alternative programs include: All Boys, All Girls, Arts-Centered Learning, Canadian Studies, Montessori, Science, Traditional Learning Centre and immersion and bilingual language programs.                         |
| Amortization                       | Amortization expenses for both supported and unsupported capital assets (“unsupported” capital assets are non-facility, “supported” capital assets are funded by externally restricted capital funding/contributions). Amortization is a “non-cash” expenditure which means that an equivalent amount of cash is available to support other priorities. As a general rule, the CBE uses amortization related cash to fund non-facility capital needs. |
| BAR                                | Budget Assumptions Report   |
| Capital assets                     | These are goods that are acquired that have a useful life that extends beyond one year and are of more than minor value. For example, computers, most musical instruments, furniture, machinery, etc. Capital assets are amortized over their useful life. Amortization periods are defined by Alberta Education.   |
| CBE                                | Calgary Board of Education  |
| CEU                                | Credit Enrolment Units (CEU) are a funding unit used to calculate base instructional funding at the high school level. CEUs are assigned when the course, the student, and the student’s achievement in a course meet certain criteria.   |
| Collective agreement               | An agreement between a union or association that sets out terms and conditions of employment including general wage increases, benefits, grid movement, and other employment terms.   |
| Deferred maintenance               | The practice of postponing repair and maintenance activities to property (such as school buildings) in order to save costs and/or meet budget funding levels.   |
| Designated school                  | All students have a designated school that is determined by the attendance area set by the resident school board. Designated schools offer regular programming and are not schools of choice. Designated schools are usually, but not always, the closest school to the residence of the student that offers regular programming.   |
| ECS                                | Early Childhood Services includes Kindergarten and educational programming for children as young as 2½ years old.   |
| Enrolment                          | Total number of students including those enrolled in Home Education, outreach programs and Chinook Learning Services.   |
| Expended deferred capital revenues | As facility capital projects are amortized (expensed) over the course of their estimated useful life, a corresponding amount of Alberta Education revenue is recognized to show that provincial funding fully offsets the cost of the building.   |

**CALGARY BOARD OF EDUCATION  
BUDGET 2017–18**

|   |   |
|---|---|
| Fixed cost                                    | A cost that will not change based on fluctuations in activity.  |
| Fall Update Budget                            | An update to the budget submitted in the spring is due to Alberta Education by November 30 of each year. This Fall Update Budget reflects updated revenue and expense estimates for actual September 30 enrolment counts.   |
| General wage increase                         | An overall wage increase or lump sum applicable to an entire union (or exempt) group.   |
| Grid movement                                 | The increase in the salary paid to an employee based on movement through progressive salary grid levels. The movement is based on the passage of time.  |
| Infrastructure, maintenance and renewal (IMR) | <p>IMR funding is provided by the Province to ensure that the health, safety and essential upgrading needs of facilities are met. IMR funding may be spent only for approved purposes such as:</p> <ul style="list-style-type: none"> <li>▪ ensure school facilities meet all regulatory requirements, particularly as they pertain to</li> <li>▪ providing a safe and healthy learning environment;</li> <li>▪ preserve and improve the quality of the learning environment by: <ul style="list-style-type: none"> <li>○ replacing building components that have failed,</li> <li>○ prolonging the life of the facility through planned, proactive replacement of major components; and</li> <li>○ upgrading of the educational areas to meet program requirements;</li> </ul> </li> <li>▪ meet the facility requirements of students with special needs; and</li> <li>▪ replace or upgrade building components to improve energy conservation and efficiency and to achieve costs savings as a result.</li> </ul> |
| Instructional supplies and materials (ISM)    | Alberta Education’s definition of ISM include the following items/costs: textbooks, workbooks, photocopying, printing/paper and any common fees charged to an entire student body or grade cohort.  |
| Operational Expectations                      | Policies established by the Board of Trustees by which the Chief Superintendent’s performance and successful operation of the organization is evaluated.  |
| RAM   | Resource Allocation Method  |
| Regular program                               | A CBE school or program within a school that is not considered an alternative program.  |
| Reserves                                      | Dollars that have been accumulated from prior years that are available to support current year projects, programs and services. Reserves can be restricted by board motion or external parties.   |
| System administration                         | The overall management, administration and educational leadership of the CBE at the system level. Also includes Board of Trustees remuneration and office budgets. Examples include functions in human resources, finance, information technology, legal and communications that provide system-level support.  |
| Total revenue                                 | All funds received from Alberta Education plus all other revenues.  |

| achieve | strategies for success



Annual Education Results Report 2015-2016  
Three-Year Education Plan 2016-2019

learning | as unique | as every student



# Annual Education Results Report (AERR) Summary

## Mission

Each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

## Overview

CBE offers a depth and breadth of programs and supports to meet the unique learning needs and interests of a richly diverse population. In addition to responsive and inclusive programming in all CBE schools, we provide opportunities for students to learn in unique settings and outreach programs.

## Fast Facts

More than 119,147 students in 242 schools, including:

- 114,162 students between pre-kindergarten and Grade 12;
- 458 students fully enrolled in CBe-learn, our online learning program, with close to 1,900 more registered in courses with CBe-learn while enrolled at another school;
- 751 students in full-day kindergarten in 16 schools;
- 2,211 students upgrading high school courses and pursuing continuing education through Chinook Learning Services;
- 18,524 students with identified special education needs, the majority of whom are learning in their community schools;
- almost 25 per cent of CBE students self-identified as English Language Learners;
- over 4,600 students self-identified as Indigenous;
- over 8,400 students in French Immersion; and
- over 4,700 students in bilingual language and culture programs.

## Student Results

On Provincial Achievement Tests (PATs):

- Grade 6 CBE results exceeded those of the province in every subject at the acceptable standard and the standard of excellence.
- Grade 9 CBE results exceeded those of the province in every subject at the acceptable standard and in three out of five subjects for the standard of excellence.

On Diploma Examinations:

- In ten of the eleven diploma examinations, the percentage of CBE students achieving the acceptable standard was equal to or above that of students in the province.
- The percentage of CBE students achieving the standard of excellence exceeded the percentage in the province on ten of eleven examinations.
- Particularly strong results were achieved in Mathematics 30-1, Biology 30, Chemistry 30, Physics 30 and Social Studies 30-2 at the standard of excellence.

Details can be found at CBE Provincial Assessment & Reports

<http://www.cbe.ab.ca/about-us/provincial-tests-and-reports/Pages/default.aspx>

On the Combined Accountability Pillar Overall Summary, Alberta Education records evaluations on the following measures: Achievement, Improvement and Overall. The Achievement Evaluation is based on a comparison of Current year data to a set of standards which remain consistent over time. The Improvement Evaluation consists of comparing the Current year result for each measure with the previous three-year average. A chi-square statistical test is used by Alberta Education to determine the significance of the improvement. The Overall Evaluation combines the Achievement Evaluation and the Improvement Evaluation. Details of the way these measures are calculated can be found on pages 38 - 39. On the Combined 2016 Accountability Pillar Overall Summary the following measures were evaluated by the province as Improved Significantly:

- Safe and Caring Schools
- Program of Studies
- Education Quality
- Drop Out Rate
- Work Preparation
- Citizenship
- School Improvement

CBE also earned an evaluation of Improved on:

- PAT results at both the acceptable standard and the standard of excellence
- Parental Involvement

In the following areas, already very high achievement was Maintained on:

- High School Completion Rate (3 yr)
- Diploma Exam Participation Rate (4+ Exams)
- Transition Rate (6 yr)

## Engaging Stakeholders

The CBE is committed to implementing the CBE *dialogue* engagement framework to give students, staff, families and community members voice in decisions that affect them. This *dialogue* framework provides guidance on how people can participate in decision-making. It defines roles and responsibilities and establishes best practices to be applied across the system. The process follows international standards for effective community engagement and ultimately, leads to more informed decisions in the best interests of students.

The CBE provides opportunities for student voices through:

- the Chief Superintendent's Student Advisory Councils;
- surveys and focus groups;
- their school's Principal Advisory Council; and
- bringing their ideas and interests to the design of learning tasks.

In February 2016, more than 23,000 CBE students, over 4,800 parents/guardians and over 4,800 teachers responded to the provincial Accountability Pillar Survey.

- 89.8 per cent agreed or strongly agreed that students are safe in school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school.
- 83.8 per cent were satisfied or very satisfied that CBE students model the characteristics of active citizenship.
- 89.4 per cent were satisfied or very satisfied with the overall quality of basic education.

## CBE Strategies for Excellence and Continued Improvement

Our overall strategy is to personalize learning and this is supported by three other strategies:

- build professional capital
- engage our stakeholders
- steward our resources

Through these strategies, the CBE supports the outcomes in Alberta Education Business Plan<sup>1</sup> (March 17, 2016) and aligns with provincial Key Strategies including the following:

- 1.3 implement systemic actions to further support student learning and achievement in mathematics;
- 2.1 ensure all students, teachers and system leaders learn about First Nations, Métis and Inuit perspectives and experiences, treaties, and the history and legacy of residential schools;
- 3.3 foster welcoming, caring, respectful and safe learning environments;
- 4.2 promote excellent teaching practices consistent with the Teaching Quality Standard, which guides student achievement; and
- 5.2 ensure school facilities support current and future education programming.

### Financial Summary

- Alberta Education grant revenue makes up 92 per cent of total revenues.
- Funding is spent primarily on Salaries and Benefits at 78 per cent of total expenses.
- Revenue and expense increases from the prior year are driven by increases in enrolment as well as collective agreement negotiated salary increases and grid movement.
- Overall results are more favorable than budgeted resulting in a \$14.6 million surplus compared with the planned \$17.9 million deficit.

[Detailed CBE Budget & Financial Information](#)

<sup>1</sup> Business Plan 2016-19: Education  
<http://finance.alberta.ca/publications/budget/budget2015/education.pdf>

## Our Ultimate Goals

The CBE Annual Education Results Report 2015-16 combined with the CBE Three-Year Education Plan 2016-19 helps the CBE build strategies that support student learning. These strategies align to the Board of Trustees Results to guide our work with fostering student success.

The Board of Trustees defines the Results as:

### Result 1 | Mission

Each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

### Result 2 | Academic Success

Each student will be literate and numerate, able to integrate and apply the knowledge, skills, attitudes and competencies acquired across all academic disciplines.

### Result 3 | Citizenship

Each student will be a responsible citizen.

### Result 4 | Personal Development

Each student will identify and actively develop individual gifts, talents and interests.

### Result 5 | Character

Each student will demonstrate good character.

Full Description of CBE Results Policies can be found here.

<http://www.cbe.ab.ca/about-us/policies-and-regulations/Pages/Results-Policies.aspx>

## Accountability

The Annual Education Results Report for the 2015-16 school year and the Education Plan for the three years commencing Sept. 1, 2016 for the Calgary Board of Education were prepared under the direction of the Board of Trustees in accordance with its responsibilities under the *School Act* and the *Fiscal Planning and Transparency Act*. This document was developed in the context of the provincial government's business and fiscal plans. The Board of Trustees has used the results reported in the document, to the best of its abilities, to develop the Education Plan and is committed to implementing the strategies contained within the Education Plan to improve student learning and results.

School councils play a key role in education and council advice is actively sought and seriously considered prior to making decisions on a wide range of school issues. School councils help build the context of school development plans through direct input at School Council meetings and the opportunities for suggestions and feedback provided to all parents/guardians. The CBE has established administrative regulations and practices that ensure school principals work toward:

- enhancing communication between the school and its parent/guardian community;
- providing a method by which the school, the home and the community may work together for the benefit of students; and
- providing a forum for discussion of school philosophies, results and operations that contributes to the creation of the school development plan.

The Board of Trustees approved this combined Annual Education Results Report for the 2015-16 school year and the Three-Year Education Plan for 2016-19 on Nov. 29, 2016.



Joy Bowen-Eyre  
Chair, Board of Trustees  
Calgary Board of Education



David Stevenson  
Chief Superintendent of Schools  
Calgary Board of Education

The Calgary Board of Education Three-Year Education Plan 2016-19 and Annual Education Results Report 2015-16 may be accessed using the following permalink:

<http://www.cbe.ab.ca/FormsManuals/AERR-2015-2016-3-YEP-2016-2019.pdf>

The Calgary Board of Education Average Class Size Report 2015-16 can be viewed at:

<https://portal.cbe.ab.ca/FormsManuals/Class-Size-Survey-Jurisdiction-Report.pdf>

# CBE Three-Year Education Plan 2016-19 and Strategies Overview

The CBE Three-Year Education Plan guides our work and connects each CBE employee to our Mission, our Values and our Outcome: Student Success, as defined through the Board of Trustees Results policies. Our task is to create an environment, aligning with Alberta Education’s fundamental goal as defined through the Ministerial Order on Student Learning, “... to inspire all students to achieve success and fulfillment, and reach their full potential by developing the competencies of Engaged Thinkers and Ethical Citizens with an Entrepreneurial Spirit ...” (Alberta Education, 2013). This coherent framework of CBE and provincial outcomes supports individual schools in their work with each student.

## Calgary Board of Education Three-Year Education Plan 2016-19

**Our Mission:** Each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

**Our Values:** Students come first. Learning is our central purpose. Public education serves the common good.

### Our Outcome: Student Success

#### Personalize Learning

Success for each student, every day, no exceptions

Instructional design and leadership focus on:

- student agency and intellectual engagement
- active and effortful tasks designed for student interests and learning needs
- assessment that informs teaching and learning
- students knowing what they know, how they know it, how they show it, and what they need next

#### Build Professional Capital

Capacity building with a focus on results

Collaborative learning networks focus on:

- professional and intellectual engagement
- shared standards of practice
- evidence-informed, research-informed and job-embedded professional learning
- staff knowing the decisions they have made, why they made them, what impact those decisions had, and what is required next

#### Engage our Stakeholders

Everyone contributes to the success of public education

Internal and external community members:

- actively recognize public education as foundational to a democratic society
- acknowledge and accept different roles, responsibilities and contributions based on shared outcomes and engagement
- support, practice and benefit from open and responsive communication
- accept responsibility for the success of the organization

#### Steward our Resources

Resource management on behalf of student learning

Decisions and actions at all levels of the organization are:

- based on values and priorities
- consistent with the learning agenda
- evidence-informed
- made within a coherent framework
- strategic & responsive
- sustainable

### Alberta Education Outcomes

- Students are successful
- The achievement gap is eliminated for FNMI students
- The education system is inclusive
- Excellent teachers and leaders
- The education system is well governed and managed

# Calgary Board of Education Three-Year Education Plan 2016-19

## Strategies and Actions

### Personalize Learning

Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.

- extend the use of learning plans and profiles that help each student be known and develop as a learner
- extend the design of responsive, inclusive, rigorous and engaging learning tasks that ensure students participate, progress and achieve

Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.

- identify and create the conditions for success for students as unique learners and as members of their school and home communities
- action Indigenous Education Strategy

Advance multiple literacies, numeracy and core competencies for each student across the subject areas.

- action Literacy Strategy
- improve clarity and coherence in mathematics teaching and learning practices through a unified mathematics strategy

### Build Professional Capital

Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture:

- action recommendations from previous review of High School Success Strategy
- build data literacy across CBE leadership teams

Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice:

- inclusive learning
- Indigenous cultures, languages and histories
- literacy, numeracy and core competencies
- task design and assessment

Introduce teacher induction program:

- engage stakeholders and develop program for teachers new to the CBE
- begin implementation of program to support new teachers in actioning personalized learning strategy

### Engage our Stakeholders

Implement *dialogue* engagement framework to give students, staff, families and community members voice in decisions that affect them.

- create opportunities for meaningful dialogue that focus on concerns and aspirations of those impacted
- demonstrate and communicate how contributions influence decisions and connect to student success

Promote a workplace culture built on the values of voice, accountability, clarity of role and responsibility in which all employees find meaning and fulfilment.

- introduce an employee engagement survey (administered every two years)
- act on input and feedback to continuously improve processes and build stronger relationships

Engage local, provincial and global partners in collaborative ventures to support student learning.

- create opportunities for Indigenous Elders and community to contribute to student learning
- expand transition opportunities for young adult students
- engage partners in support of shared literacy and mathematics goals

### Steward our Resources

Build, optimize, modernize and/or maintain schools and infrastructure to foster enriching learning environments

Improve access to and use of data

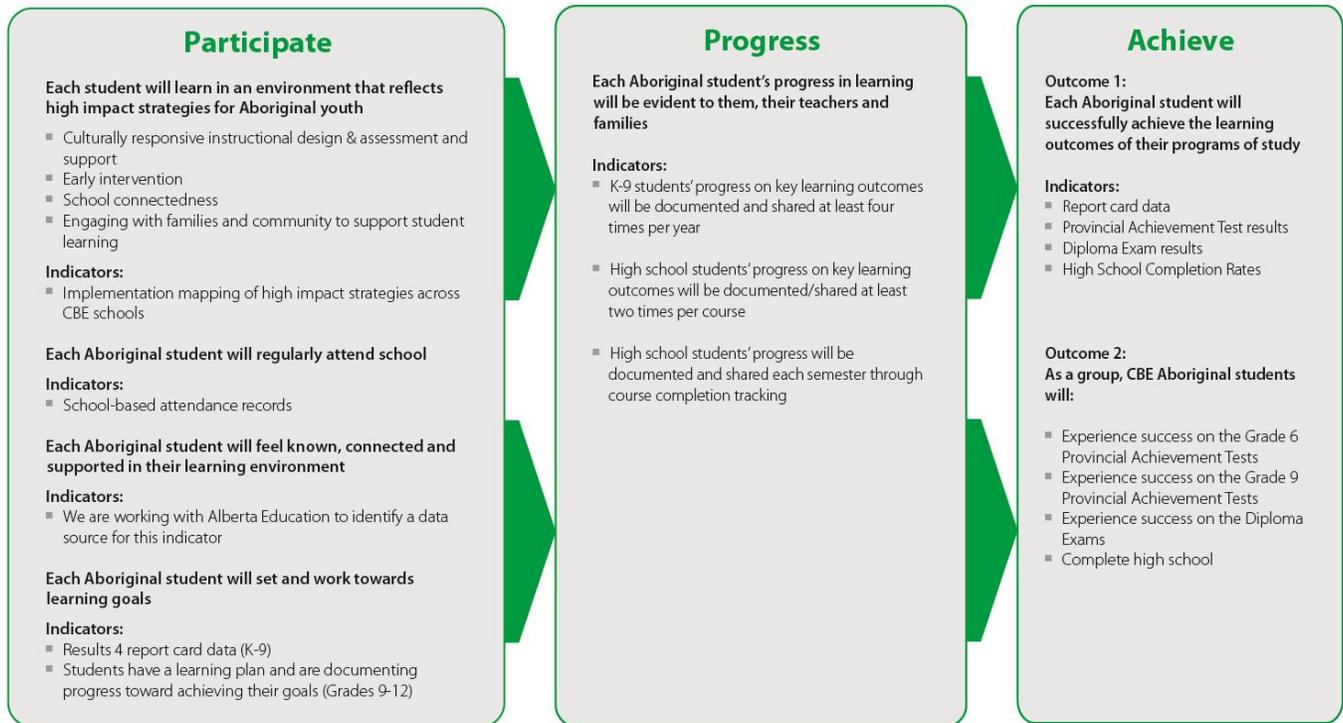
Develop and implement a new student information system

Enhance operational performance through increasingly effective, efficient and streamlined business processes and practices

## Indigenous Education Strategy 2016-19

**Outcome 1:** Each Aboriginal student will participate, progress and achieve in their learning programs.

**Outcome 2:** As a group, CBE Aboriginal students will show improvement within Alberta Education's Accountability Pillar Measures, closing the achievement gap between Aboriginal students and all Alberta students.



# Indigenous Education Strategy 2016-19

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## Priorities

### Indigenizing CBE

Cultivating a balanced and respectful relationship between Indigenous knowledge and existing CBE knowledge structures.

### Culturally Responsive Instructional Design & Assessment and Support

Honouring Indigenous histories, cultures and languages through responsive learning environments and instructional design & assessment.

### System-Wide Learning

Ensuring staff are knowledgeable, understanding and respectful of the rich diversity of First Nations, Métis and Inuit cultures, languages and histories; the importance of treaties and agreements with First Nations and Métis; and the history and legacy of residential schools

### Building Respectful Working Relationships with Community

Working with community from the very beginning as part of how we think about and do everything.

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## Key Actions

### Key Actions 2016-17

#### Teaching and Learning/Community Engagement

- Build strong collective network of support to advance culturally responsive environments, instructional design & assessment and support across schools
- Extend High School Graduation Coaching Model to 11 elementary/middle schools to work as cohort to create and document wise practice with high impact strategies
- Establish Aboriginal Learning Centre: gathering place for community; supports and services for families; and, pre K-3 school program (pre K-1 first year)

#### Business Supports

- Redesign allocation of human and financial resources to enable implementation of high impact strategies
- Design succession and recruitment strategy for Indigenous Education

### Key Actions 2017-18

#### Teaching and Learning/Community Engagement

- Strengthen strong collective network of support to advance culturally responsive environments, instructional design & assessment and support across schools
- Extend high impact strategies across CBE schools
- Advance system-wide learning to meet new Teacher Quality/Leader Standards for the benefit of all students
- Design traditional, holistic approach/response to support improved attendance

Continued revision and extension of previous implementation strategies

### Key Actions 2018-19

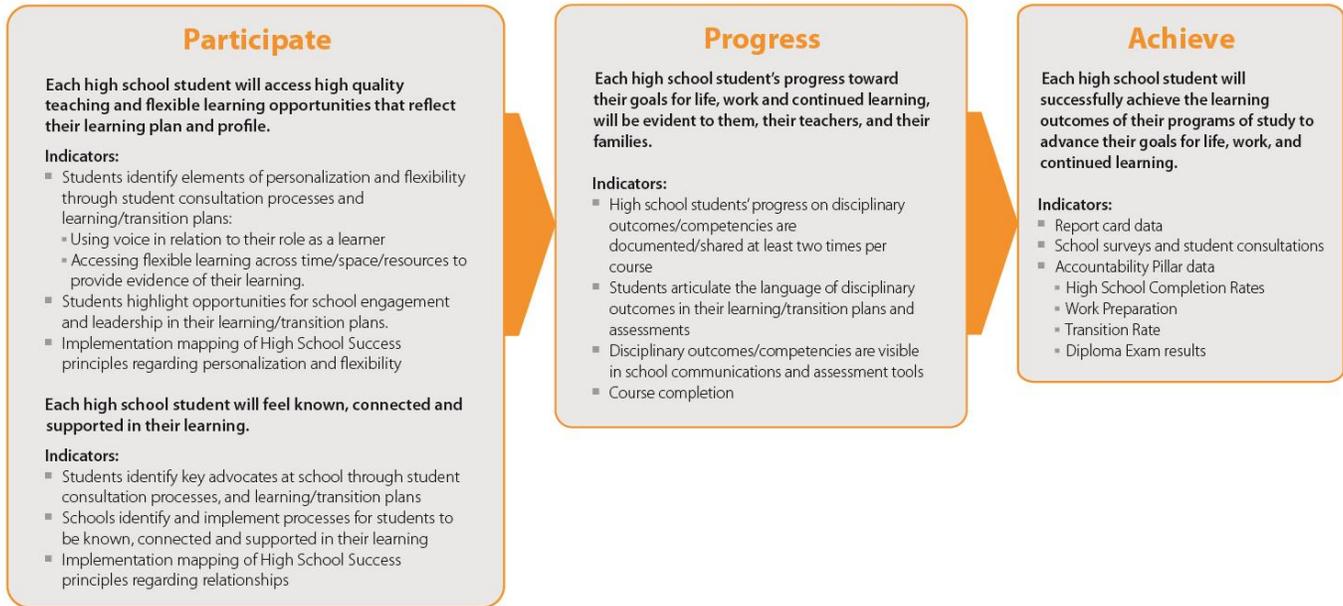
#### Teaching and Learning/Community Engagement

Continued revision and extension of previous implementation strategies

## High School Success Strategy 2016-19

### Outcome:

Each CBE high school student will participate, progress and achieve in their learning programs.



Alberta Education identifies three outcomes for high school redesign: • engaged students • high levels of achievement • quality teaching

# High School Success Strategy 2016-19

## Conditions for Success

Moving Forward with High School Redesign (MFWHSR), a province-wide initiative that includes over 200 high schools, highlights “conditions for student success”. Calgary Board of Education continues to evolve our approach to these conditions:

### Pedagogy

- Designing personalized learning for students through professional learning/networks in task design and assessment.
- Identifying intervention and transition practices.

### School Leadership

- Building school leadership teams that collaboratively strengthen their response to the principles of high school redesign including personalization, flexibility and relationships.
- Designing collective research-based and evidence-informed practices that accelerate student learning.

### School Culture

- Creating ongoing opportunities for student agency/voice/leadership.
- Engaging with partners around shared goals for student learning and career development

### School Structures

- Connecting and making visible the school practices that reflect the principles of high school redesign that support personalization, flexibility and relationships



## Key Actions

### Key Actions 2016-17

- Align formative/summative assessment practices with outcomes-based assessment and task design
- Develop a continuum of practices that allow students to be known and their learning/life goals to be supported and enriched
- Build coherence in intervention (credit rescue / attendance / essential learning assessments) and Iris/transition practices
- Expand unique pathways, dual credit, work experience and career development opportunities for students
- Articulate school communications regarding the principles of High School Success that support personalization, flexibility and relationships

### Key Actions 2017-18

Continued revision and extension of previous implementation strategies

- Task design and assessment
- Practices for students to be known and their learning/life goals to be supported and enriched
- Intervention/transition practices for students
- Career development opportunities for students

### Key Actions 2018-19

Continued revision and extension of previous implementation strategies

## Fostering a Positive Workplace Environment Strategy 2016-19

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**Outcome:** CBE has a workplace culture built on the values of voice, accountability, clarity of role and responsibility in which all employees find meaning and fulfillment.

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### Key Actions

#### Key Actions 2016-17

- Create a representative Positive Workplace Environment Committee
- Identify preferred survey methodology and select a vendor
- Survey employees with respect to their level of engagement
- Share baseline results with stakeholders
- Build capacity of leaders to analyze results and plan strategies to address areas of growth where feasible

#### Progress Indicator

- Baseline data story

#### Key Actions 2017-18

- Supervisors and workgroups determine how to strategically address areas of growth in work plans
- Implement the strategies within workgroups

#### Progress Indicator

- Responsive implementation plans in workgroups and across workgroups

#### Key Actions 2018-19

- Survey representative group of employees to determine progress
- Celebrate success and use data to inform the adjustment cycle

#### Progress Indicator

- Improvement in targeted areas addressed by plans

## Combined 2016 Accountability Pillar: Overall Summary

| Measure Category  | Measure Category Evaluation | Measure                                    | Calgary School District No. 19 |                  |                     | Alberta        |                  |                     | Measure Evaluation |                        |           |
|---|-----------------------------|--|--------------------------------|------------------|---------------------|----------------|------------------|---------------------|--------------------|------------------------|-----------|
|   |                             |  | Current Result                 | Prev Year Result | Prev 3 Year Average | Current Result | Prev Year Result | Prev 3 Year Average | Achievement        | Improvement            | Overall   |
| Safe and Caring Schools                                       | Excellent                   | Safe and Caring                            | 89.8                           | 88.2             | 88.5                | 89.5           | 89.2             | 89.1                | Very High          | Improved Significantly | Excellent |
| Student Learning Opportunities                                | Good                        | Program of Studies                         | 83.2                           | 81.1             | 82.2                | 81.9           | 81.3             | 81.4                | Very High          | Improved Significantly | Excellent |
|   |                             | Education Quality                          | 89.4                           | 87.6             | 87.9                | 90.1           | 89.5             | 89.5                | High               | Improved Significantly | Good      |
|   |                             | Drop Out Rate                              | 2.8                            | 3.3              | 3.4                 | 3.2            | 3.5              | 3.5                 | High               | Improved Significantly | Good      |
|   |                             | High School Completion Rate (3 yr)         | 75.2                           | 76.2             | 74.7                | 76.5           | 76.5             | 75.5                | High               | Maintained             | Good      |
| Student Learning Achievement (Grades K-9)                     | Good                        | PAT: Acceptable                            | 75.5                           | 74.8             | 74.6                | 73.6           | 72.9             | 73.4                | Intermediate       | Improved               | Good      |
|   |                             | PAT: Excellence                            | 20.4                           | 19.9             | 19.5                | 19.4           | 18.8             | 18.6                | High               | Improved               | Good      |
| Student Learning Achievement (Grades 10-12)                   | n/a                         | Diploma: Acceptable                        | 87.2                           | 88.0             | 88.2                | 85.0           | 85.2             | 85.1                | High               | Declined Significantly | Issue     |
|   |                             | Diploma: Excellence                        | 27.3                           | 27.7             | 28.1                | 21.0           | 21.0             | 20.5                | Very High          | Declined               | Good      |
|   |                             | Diploma Exam Participation Rate (4+ Exams) | 61.0                           | 60.7             | 60.8                | 54.6           | 54.4             | 53.5                | High               | Maintained             | Good      |
|   |                             | Rutherford Scholarship Eligibility Rate    | 61.1                           | n/a              | n/a                 | 60.8           | n/a              | n/a                 | n/a                | n/a                    | n/a       |
| Preparation for Lifelong Learning, World of Work, Citizenship | Good                        | Transition Rate (6 yr)                     | 60.9                           | 61.3             | 60.3                | 59.4           | 59.7             | 59.3                | High               | Maintained             | Good      |
|   |                             | Work Preparation                           | 79.3                           | 78.2             | 77.9                | 82.6           | 82.0             | 81.1                | High               | Improved Significantly | Good      |
|   |                             | Citizenship                                | 83.8                           | 82.3             | 82.6                | 83.9           | 83.5             | 83.4                | Very High          | Improved Significantly | Excellent |
| Parental Involvement  | Good                        | Parental Involvement                       | 78.4                           | 77.2             | 77.5                | 80.9           | 80.7             | 80.5                | Intermediate       | Improved               | Good      |
| Continuous Improvement  | Excellent                   | School Improvement                         | 80.4                           | 75.6             | 77.5                | 81.2           | 79.6             | 80.0                | Very High          | Improved Significantly | Excellent |

### Notes

- 1 | Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- 2 | Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
- 3 | Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), and Social Studies (Grades 6, 9, 9 KAE).
- 4 | Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: Biology 30, Chemistry 30, English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Physics 30, Science 30, Social Studies 30-1, and Social Studies 30-2.
- 5 | Diploma Examination Participation, High School Completion and High School to Post-secondary Transition rates are based upon a cohort of grade 10 students who are tracked over time.
- 6 | Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- 7 | Results for the Alberta Commission on Learning (ACOL) measures are available in the detailed report: see "ACOL Measures" in the Table of Contents.
- 8 | Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 9 | Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 10 | Survey results for the province and school authorities were impacted by the changes in the number of students responding to the survey through the introduction of the OurSCHOOL/TTFM (Tell Them From Me) survey in 2014.

## Combined 2016 Accountability Pillar: First Nations, Métis and Inuit Summary

| Measure Category  | Measure Category Evaluation | Measure                                    | Calgary School District No. 19 (FNMI) |                  |                     | Alberta (FNMI) |                  |                     | Measure Evaluation |                        |            |
|---|-----------------------------|--|---------------------------------------|------------------|---------------------|----------------|------------------|---------------------|--------------------|------------------------|------------|
|   |                             |  | Current Result                        | Prev Year Result | Prev 3 Year Average | Current Result | Prev Year Result | Prev 3 Year Average | Achievement        | Improvement            | Overall    |
| Student Learning Opportunities                                | n/a                         | Drop Out Rate                              | 5.5                                   | 9.0              | 9.1                 | 6.1            | 7.0              | 7.2                 | Intermediate       | Improved Significantly | Good       |
|   |                             | High School Completion Rate (3 yr)         | 33.2                                  | 35.1             | 34.0                | 50.2           | 47.7             | 46.4                | Very Low           | Maintained             | Concern    |
| Student Learning Achievement (Grades K-9)                     | Concern                     | PAT: Acceptable                            | 39.6                                  | 42.4             | 41.8                | 52.4           | 52.1             | 52.8                | Very Low           | Maintained             | Concern    |
|   |                             | PAT: Excellence                            | 3.2                                   | 3.3              | 3.9                 | 6.3            | 6.5              | 6.2                 | Very Low           | Maintained             | Concern    |
| Student Learning Achievement (Grades 10-12)                   | n/a                         | Diploma: Acceptable                        | 83.7                                  | 87.9             | 85.7                | 78.2           | 78.3             | 77.3                | Intermediate       | Maintained             | Acceptable |
|   |                             | Diploma: Excellence                        | 16.8                                  | 15.7             | 16.0                | 10.0           | 9.5              | 9.4                 | Intermediate       | Maintained             | Acceptable |
|   |                             | Diploma Exam Participation Rate (4+ Exams) | 14.2                                  | 16.3             | 15.8                | 20.7           | 21.0             | 20.4                | Very Low           | Maintained             | Concern    |
|   |                             | Rutherford Scholarship Eligibility Rate    | 20.3                                  | n/a              | n/a                 | 31.9           | n/a              | n/a                 | n/a                | n/a                    | n/a        |
| Preparation for Lifelong Learning, World of Work, Citizenship | n/a                         | Transition Rate (6 yr)                     | 25.6                                  | 24.6             | 25.5                | 33.5           | 33.0             | 33.3                | Very Low           | Maintained             | Concern    |

### Notes

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- 2 | Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
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- 10 | Survey results for the province and school authorities were impacted by the changes in the number of students responding to the survey through the introduction of the OurSCHOOL/TTFM (Tell Them From Me) survey in 2014.

## Outcome One: Alberta's students are successful

| Performance Measure  | Results (in percentages) |      |      |      |      | Target | Evaluation   |             |         | Targets |      |      |
|--|--------------------------|------|------|------|------|--------|--------------|-------------|---------|---------|------|------|
|  | 2012                     | 2013 | 2014 | 2015 | 2016 | 2016   | Achievement  | Improvement | Overall | 2017    | 2018 | 2019 |
| Overall percentage of students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (overall cohort results).    | 76.8                     | 80.2 | 74.4 | 74.8 | 75.5 | 75.4*  | Intermediate | Improved    | Good    |         |      |      |
| Overall percentage of students in Grades 6 and 9 who achieved the standard of excellence on Provincial Achievement Tests (overall cohort results). | 20.7                     | 20.5 | 19.0 | 19.9 | 20.4 |        | High         | Improved    | Good    |         |      |      |

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue* or *Concern*. Overall percentage of students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (all student cohort results) was an Issue in the 2014-2015 AERR; accordingly a target was set for 2016.

Year over year, Alberta Education revises results to reflect updated information.

- The 2015 result for this measure published in the October 2015 update to the Accountability Pillar Survey was 74.9%.
- The 2015 result for this measure published in the October 2016 update to the Accountability Pillar Survey was 74.8%.
- The target set for 2016 was 75.4% which would represent an increase of 0.5 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2016 was 75.4% and the result for 2016 was 75.5%; we met our target.
  - Second is based on the adjusted result for this measure. We could consider the same 0.5 percentage point targeted increase to have been met ( $74.8 + 0.5 = 75.3$ ; our 2016 result is 75.5% - target met).

### Strategies

#### Personalize learning

*Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.*

- extend the use of learning plans and profiles that help each student be known and develop as a learner
- extend the design of responsive, inclusive, rigorous and engaging learning tasks that ensure students participate, progress and achieve

*Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.*

- identify and create the conditions for success for students as unique learners and as members of their school and home communities
- action Indigenous Education Strategy

*Advance multiple literacies, numeracy and core competencies for each student across the subject areas.*

- action Literacy Strategy
- improve clarity and coherence in mathematics teaching and learning practices through a unified mathematics strategy

#### Build professional capital

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

*Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice.*

- inclusive learning
- Indigenous cultures, languages and histories
- literacy, numeracy and core competencies
- task design and assessment

### Notes

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- 3 | Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.

## Outcome One: Alberta's students are successful (continued)

| Performance Measure   | Results (in percentages) |      |      |      |      | Target<br>2016 | Evaluation  |                        |         | Targets |      |      |
|---|--------------------------|------|------|------|------|----------------|-------------|------------------------|---------|---------|------|------|
|   | 2012                     | 2013 | 2014 | 2015 | 2016 |                | Achievement | Improvement            | Overall | 2017    | 2018 | 2019 |
| Overall percentage of students who achieved the acceptable standard on diploma examinations (overall results).    | 86.2                     | 87.3 | 88.3 | 88.0 | 87.2 |                | High        | Declined Significantly | Issue   | 88.3    | 88.4 | 90.3 |
| Overall percentage of students who achieved the standard of excellence on diploma examinations (overall results). | 25.6                     | 24.7 | 28.6 | 27.7 | 27.3 |                | Very High   | Declined               | Good    |         |      |      |

| Performance Measure   | Results (in percentages) |      |      |      |      | Target<br>2016 | Evaluation |                        |             | Targets |      |      |
|---|--------------------------|------|------|------|------|----------------|------------|------------------------|-------------|---------|------|------|
|   | 2011                     | 2012 | 2013 | 2014 | 2015 |                | 2016       | Achievement            | Improvement | Overall | 2017 | 2018 |
| High School Completion Rate - Percentage of students who completed high school within three years of entering Grade 10. | 72.5                     | 73.1 | 74.8 | 76.2 | 75.2 |                | High       | Maintained             | Good        |         |      |      |
| Drop Out Rate - annual dropout rate of students aged 14 to 18   | 4.0                      | 3.7  | 3.3  | 3.3  | 2.8  |                | High       | Improved Significantly | Good        |         |      |      |
| High school to post-secondary transition rate of students within six years of entering Grade 10.                        | 58.5                     | 59.0 | 60.4 | 61.3 | 60.9 |                | High       | Maintained             | Good        |         |      |      |
| Percentage of Grade 12 students eligible for a Rutherford Scholarship.  | n/a                      | n/a  | n/a  | n/a  | 61.1 |                | n/a        | n/a                    | n/a         |         |      |      |
| Percentage of students writing four or more diploma exams within three years of entering Grade 10.                      | 61.1                     | 60.8 | 48.5 | 60.7 | 61.0 |                | High       | Maintained             | Good        |         |      |      |

### Notes

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- 3 | Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: Biology 30, Chemistry 30, English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Physics 30, Science 30, Social Studies 30-1, and Social Studies 30-2.
- 4 | Diploma Examination Participation, High School Completion and High School to Post-secondary Transition rates are based upon a cohort of grade 10 students who are tracked over time.
- 5 | Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.

## Strategies

### **Personalize learning**

*Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.*

- extend the use of learning plans and profiles that help each student be known and develop as a learner
- extend the design of responsive, inclusive, rigorous and engaging learning tasks that ensure students participate, progress and achieve

*Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.*

- identify and create the conditions for success for students as unique learners and as members of their school and home communities
- action Indigenous Education Strategy

*Advance multiple literacies, numeracy and core competencies for each student across the subject areas.*

- action Literacy Strategy
- improve clarity and coherence in mathematics teaching and learning practices through a unified mathematics strategy

### **Build professional capital**

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

- action recommendations from previous review of High School Success Strategy

*Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice.*

inclusive learning

- Indigenous cultures, languages and histories
- literacy, numeracy and core competencies
- task design and assessment

## Outcome One: Alberta's students are successful (continued)

| Performance Measure  | Results (in percentages) |      |      |      |      | Target<br>2016 | Evaluation  |                        |           | Targets |      |      |
|--|--------------------------|------|------|------|------|----------------|-------------|------------------------|-----------|---------|------|------|
|  | 2012                     | 2013 | 2014 | 2015 | 2016 |                | Achievement | Improvement            | Overall   | 2017    | 2018 | 2019 |
| Percentage of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.                                  | 81.2                     | 82.4 | 83.1 | 82.3 | 83.8 |                | Very High   | Improved Significantly | Excellent |         |      |      |
| Percentage of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school. | 76.4                     | 77.3 | 78.2 | 78.2 | 79.3 |                | High        | Improved Significantly | Good      |         |      |      |

### Strategies

#### Personalize learning

*Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.*

- extend the use of learning plans and profiles that help each student be known and develop as a learner

*Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.*

- identify and create the conditions for success for students as unique learners and as members of their school and home communities

#### Build professional capital

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

- action recommendations from previous review of High School Success Strategy

#### Engage our stakeholders

*Engage local, provincial and global partners in collaborative ventures to support student learning.*

- expand transition opportunities for young adult students

### Note

- 1 | Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2015.

## Outcome Two: The achievement gap between First Nations, Métis, and Inuit students and all other students is eliminated

| Performance Measure   | Results (in percentages) |      |      |      |      | Target<br>2016 | Evaluation   |             |            | Targets |      |      |
|---|--------------------------|------|------|------|------|----------------|--------------|-------------|------------|---------|------|------|
|   | 2012                     | 2013 | 2014 | 2015 | 2016 |                | Achievement  | Improvement | Overall    | 2017    | 2018 | 2019 |
| Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (overall cohort results).    | 42.7                     | 47.0 | 41.1 | 42.4 | 39.6 | 43.0*          | Very Low     | Maintained  | Concern    | 44.2    | 45.0 | 45.9 |
| Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the standard of excellence on Provincial Achievement Tests (overall cohort results). | 3.7                      | 4.4  | 4.4  | 3.3  | 3.2  | 4.0*           | Very Low     | Maintained  | Concern    | 4.9     | 5.1  | 5.7  |
| Overall percentage of self-identified FNMI students who achieved the acceptable standard on diploma examinations (overall results).                                     | 82.7                     | 81.0 | 83.4 | 87.9 | 83.7 |                | Intermediate | Maintained  | Acceptable |         |      |      |
| Overall percentage of self-identified FNMI students who achieved the standard of excellence on diploma examinations (overall results).                                  | 9.5                      | 9.5  | 16.3 | 15.7 | 16.8 |                | Intermediate | Maintained  | Acceptable |         |      |      |

| Performance Measure  | Results (in percentages) |      |      |      |      | Target<br>2016 | Evaluation   |                        |         | Targets |      |      |
|--|--------------------------|------|------|------|------|----------------|--------------|------------------------|---------|---------|------|------|
|  | 2011                     | 2012 | 2013 | 2014 | 2015 |                | Achievement  | Improvement            | Overall | 2017    | 2018 | 2019 |
| High School Completion Rate - Percentage of self-identified FNMI students who completed high school within three years of entering Grade 10. | 26.0                     | 32.1 | 34.8 | 35.1 | 33.2 | 35.0*          | Very Low     | Maintained             | Concern | 38.3    | 39.7 | 41.3 |
| Drop Out Rate - annual dropout rate of self-identified FNMI students aged 14 to 18   | 10.1                     | 9.3  | 8.8  | 9.0  | 5.5  |                | Intermediate | Improved Significantly | Good    |         |      |      |
| High school to post-secondary transition rate of self-identified FNMI students within six years of entering Grade 10.                        | 27.0                     | 25.6 | 26.2 | 24.6 | 25.6 | 25.0*          | Very Low     | Maintained             | Concern | 29.8    | 31.0 | 33.2 |
| Percentage of Grade 12 self-identified FNMI students eligible for a Rutherford Scholarship.  | n/a                      | n/a  | n/a  | n/a  | 20.3 |                | n/a          | n/a                    | n/a     |         |      |      |
| Percentage of self-identified FNMI students writing four or more diploma exams within three years of entering Grade 10.                      | 15.7                     | 15.3 | 13.9 | 16.3 | 14.2 | 18.0*          | Very Low     | Maintained             | Concern | 18.7    | 19.7 | 20.9 |

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue or Concern*. Year over year, Alberta Education revises results to reflect updated information.

Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (all student cohort results) was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2015 result for this measure published in the October 2015 update to the Accountability Pillar Survey was 42.4%.
- The 2015 result for this measure published in the October 2016 update to the Accountability Pillar Survey was 42.4%.
- The target set for 2016 was 43.0% which would represent an increase of 0.6 percentage points.
- The target for 2016 was 43.0% and the result for 2016 was 39.6%; we did not meet our target.

Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the standard of excellence on Provincial Achievement Tests (all student cohort results) was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2015 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 3.2%.
- The 2015 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 3.3%.
- The target set for 2016 was 4.0% which would represent an increase of 0.8 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2016 was 4.0% and the result for 2016 was 3.2%; we did not meet our target.
  - Second is based on the adjusted result for this measure. We could consider the same 0.8 percentage point targeted increase not to have been met ( $3.3 + 0.8 = 4.1$ ; our 2016 result is 3.2% - target not met).

High School Completion Rate - Percentage of self-identified FNMI students who completed high school within three years of entering Grade 10 was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2014 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 33.2%.
- The 2014 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 35.1%.
- The target set for 2015 was 34.0% which would represent an increase of 0.8 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2015 was 34.0% and the result for 2015 was 33.2%; we did not meet our target.
  - Second is based on the adjusted result for this measure. We could consider the same 0.8 percentage point targeted increase not to have been met ( $35.1 + 0.8 = 35.9$ ; our 2015 result is 33.2% - target not met).

Drop Out Rate – annual dropout rate of self-identified FNMI students aged 14 to 18 was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2014 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 9.6%.
- The 2014 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 9.0%.
- The target set for 2015 was 9.4% which would represent a decrease of 0.2 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2015 was 9.4% and the result for 2015 was 5.5%; we met our target.
  - Second is based on the adjusted result for this measure. We could consider the same 0.2 percentage point targeted decrease to have been met ( $9.0 - 0.2 = 8.8$ ; our 2015 result is 5.5% - target met).

High school to post-secondary transition rate of self-identified FNMI students within six years of entering Grade 10 was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2014 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 23.9%.
- The 2014 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 24.6%.
- The target set for 2015 was 25.0% which would represent an increase of 1.1 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2015 was 25.0% and the result for 2015 was 25.6%; we met our target.
  - Second is based on the adjusted result for this measure. We could consider the same 1.1 percentage point targeted increase not to have been met ( $24.6 + 1.1 = 25.7$ ; our 2015 result is 25.6% - target not met).

Percentage of self-identified FNMI students writing four or more diploma exams within three years of entering Grade 10 was a *Concern* in the 2014-2015 AERR; accordingly a target was set for 2016.

- The 2014 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 17.0%.
- The 2014 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 16.3%.
- The target set for 2015 was 17.5% which would represent an increase of 0.5 percentage points.
- There are two ways to consider whether we met our target.
  - One is the target for 2015 was 17.5% and the result for 2015 was 14.2%; we did not meet our target.
  - Second is based on the adjusted result for this measure. We could consider the same 0.5 percentage point targeted increase not to have been met ( $16.3 + 0.5 = 16.8$ ; our 2015 result is 14.2% - target not met).

#### Notes

- 1 | Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- 2 | Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
- 3 | Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6,

- 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), and Social Studies (Grades 6, 9, 9 KAE).
- 4 | Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: Biology 30, Chemistry 30, English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Physics 30, Science 30, Social Studies 30-1, and Social Studies 30-2.
  - 5 | Diploma Examination Participation, High School Completion and High School to Post-secondary Transition rates are based upon a cohort of grade 10 students who are tracked over time.
  - 6 | Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
  - 7 | Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.

## Strategies

### Personalize learning

*Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.*

- extend the use of learning plans and profiles that help each student be known and develop as a learner
- extend the design of responsive, inclusive, rigorous and engaging learning tasks that ensure students participate, progress and achieve

*Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.*

- identify and create the conditions for success for students as unique learners and as members of their school and home communities
- action Indigenous Education Strategy

*Advance multiple literacies, numeracy and core competencies for each student across the subject areas.*

- action Literacy Strategy
- improve clarity and coherence in mathematics teaching and learning practices through a unified mathematics strategy

### Build professional capital

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

- action recommendations from previous review of High School Success Strategy

*Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice.*

- inclusive learning
- Indigenous cultures, languages and histories
- literacy, numeracy and core competencies
- task design and assessment

### Engage our stakeholders

*Implement dialogue engagement framework to give students, staff, families and community members voice in decisions that affect them.*

- create opportunities for meaningful dialogue that focus on concerns and aspirations of those impacted
- demonstrate and communicate how contributions influence decisions and connect to student success

*Engage local, provincial and global partners in collaborative ventures to support student learning.*

- create opportunities for Indigenous Elders and community to contribute to student learning
- expand transition opportunities for young adult students

## Outcome Three: Alberta's education system is inclusive

| Performance Measure  | Results (in percentages) |      |      |      |      | Target | Evaluation |                        |             | Targets |      |      |
|--|--------------------------|------|------|------|------|--------|------------|------------------------|-------------|---------|------|------|
|  | 2012                     | 2013 | 2014 | 2015 | 2016 |        | 2016       | Achievement            | Improvement | Overall | 2017 | 2018 |
| Percentage of teacher, parent and student agreement that: students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school. | 87.8                     | 88.3 | 89.0 | 88.2 | 89.8 |        | Very High  | Improved Significantly | Excellent   |         |      |      |

### Strategies

#### Personalize learning

*Evolve, extend and integrate practices consistent with the elements of CBE's vision for high quality teaching and learning.*

- extend the use of learning plans and profiles that help each student be known and develop as a learner
- extend the design of responsive, inclusive, rigorous and engaging learning tasks that ensure students participate, progress and achieve

*Clarify and extend inclusive practices through responsive, enabling learning environments and instruction.*

- identify and create the conditions for success for students as unique learners and as members of their school and home communities
- action Indigenous Education Strategy

#### Build professional capital

*Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice.*

- inclusive learning
- Indigenous cultures, languages and histories

#### Engage our stakeholders

*Implement dialogue engagement framework to give students, staff, families and community members voice in decisions that affect them.*

- create opportunities for meaningful dialogue that focus on concerns and aspirations of those impacted
- demonstrate and communicate how contributions influence decisions and connect to student success

*Promote a workplace culture built on the values of voice, accountability, clarity of role and responsibility in which all employees find meaning and fulfillment.*

- act on input and feedback to continuously improve processes and build stronger relationships

### Note

- 1 | Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2015.

## CBE Disclosure

The CBE Public Interest Disclosure (Whistleblower Protection) policy was approved in February 2014. From September 30, 2015, up to and including September 29, 2016 the following has been received:

|   |   |
|---|---|
| Disclosures received by the Designated Officer                                | 0 |
| Disclosures acted on  | 0 |
| Disclosures not acted on  | 0 |
| Investigations commenced by the Designated Officer as a result of disclosures | 0 |

## Outcome Four: Alberta has excellent teachers, school and school authority leaders

| Performance Measure  | Results (in percentages) |      |      |      |      | Target | Evaluation  |                        |           | Targets |      |      |
|--|--------------------------|------|------|------|------|--------|-------------|------------------------|-----------|---------|------|------|
|  | 2012                     | 2013 | 2014 | 2015 | 2016 | 2016   | Achievement | Improvement            | Overall   | 2017    | 2018 | 2019 |
| Percentage of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies including fine arts, career, technology, and health and physical education. | 82.0                     | 82.4 | 83.1 | 81.1 | 83.2 | 82.1*  | Very High   | Improved Significantly | Excellent |         |      |      |

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue* or *Concern*. Overall percentage of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies including fine arts, career, technology, and health and physical education was an Issue in the 2014-2015 AERR; accordingly a target was set for 2016.

Year over year, Alberta Education revises results to reflect updated information.

- The 2015 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 81.1%.
- The 2015 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 81.1%.
- The target set for 2016 was to achieve an increase of 1.0 percentage points.
- According to the target of 82.1% set for 2016, we have met our target (target = 81.1 + 1.0 = 82.1; our 2016 result of 83.2 exceeds our target of 82.1).

### Strategies

#### Build professional capital

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

- build data literacy across CBE leadership teams

*Accelerate collective impact on student learning through leadership practices and professional learning that addresses shared problems of practice.*

- inclusive learning
- Indigenous cultures, languages and histories
- literacy, numeracy and core competencies
- task design and assessment

*Introduce teacher induction program.*

- engage stakeholders and develop program for teachers new to the CBE
- begin implementation of program to support new teachers in actioning personalized learning strategy.

#### Engage our stakeholders

*Implement dialogue engagement framework to give students, staff, families and community members voice in decisions that affect them.*

- create opportunities for meaningful dialogue that focus on concerns and aspirations of those impacted
- demonstrate and communicate how contributions influence decisions and connect to student success

### Note

- 1 | Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2015.

## Outcome Five: The education system is well governed and managed

| Performance Measure  | Results (in percentages) |      |      |      |      | Target | Evaluation   |                        |             | Targets |      |      |
|--|--------------------------|------|------|------|------|--------|--------------|------------------------|-------------|---------|------|------|
|  | 2012                     | 2013 | 2014 | 2015 | 2016 |        | 2016         | Achievement            | Improvement | Overall | 2017 | 2018 |
| Percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years. | 77.6                     | 78.7 | 78.3 | 75.6 | 80.4 | 76.0*  | Very High    | Improved Significantly | Excellent   |         |      |      |
| Percentage of teachers and parents satisfied with parental involvement in decisions about their child's education.   | 76.0                     | 77.4 | 77.9 | 77.2 | 78.4 |        | Intermediate | Improved               | Good        |         |      |      |
| Percentage of teachers, parents and students satisfied with the overall quality of basic education.  | 88.1                     | 88.3 | 87.8 | 87.6 | 89.4 |        | High         | Improved Significantly | Good        |         |      |      |

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue* or *Concern*. Percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years was flagged as an Issue in the 2014-2015 AERR; accordingly a target was set for 2016.

Year over year, Alberta Education revises results to reflect updated information.

- The 2015 result for this measure published in the 2015 October update to the Accountability Pillar Survey was 75.6%.
- The 2015 result for this measure published in the 2016 October update to the Accountability Pillar Survey was 75.6%.
- The target set for 2016 was to achieve an increase of 0.4 percentage points.
- According to the target of 76.0% set for 2016, we met our target (target = 75.6 + 0.4 = 76.0; our 2016 result of 80.4 exceeds our target of 76.0).

### Strategies

#### Build professional capital

*Build coherence and continuous improvement in program provision, service delivery, and professional learning through a collaborative and evidence-informed culture.*

- action recommendations from previous review of High School Success Strategy
- build data literacy across CBE leadership teams

#### Engage our stakeholders

*Implement dialogue engagement framework to give students, staff, families and community members voice in decisions that affect them.*

- create opportunities for meaningful dialogue that focus on concerns and aspirations of those impacted
- demonstrate and communicate how contributions influence decisions and connect to student success

*Promote a workplace culture built on the values of voice, accountability, clarity of role and responsibility in which all employees find meaning and fulfilment.*

#### Steward our resources

*Build, optimize, modernize, and/or maintain schools and infrastructure to foster enriching learning environments.*

*Improve access to and use of data.*

*Develop and implement a new student information system.*

*Enhance operational performance through increasingly effective, efficient and streamlined business processes and practices.*

### Note

- 1 | Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2015.

# Summary of Financial Results for 2015-16

## Year-Over-Year Highlights

From 2014-15 to 2015-16, student enrolment increased by approximately 2.2 per cent (2,485 students) as measured on Sept. 30 of each school year. Comparing the 2015-16 actual results to the prior year highlights the following:

- Revenue from Alberta Education was up \$64.4 million; an increase of 5.6 per cent. Provincial funding per student increased marginally, however total funding increased primarily due to enrolment growth.
- Employee salaries and benefits represent 78 per cent of expenses. The expense increased year-over-year by \$45.9 million. This 4.7 per cent reflects an increase in school-based permanent positions due to increased enrolment, and the negotiated salary and step increment increases for various employee groups. The increase also reflects a \$14.5 million one-time investment to further schools' goals of improving student achievement and \$1.5 million to hire high school graduation coaches to support First Nations, Métis and Inuit students.
- In 2015-16, the provincial government limited board and system administrative expenses<sup>1</sup> to 3.6 per cent of the operating budget. For 2015-16, the CBE spent 2.6 per cent of its total operating expenses on board and system administration, enabling more resources to be directed to the classroom and classroom support. As a result, centralized supports to schools are lean.
- CBE's accumulated surplus has increased by \$8.6 million due to higher than anticipated investment gains realized through investment transactions.

## Actual to Budget Highlights

The CBE's 2015-16 budget was developed and approved by the Board of Trustees in the spring of 2015 for implementation in September of that same year. The budget was based on estimates of an expected enrolment increase of 2455 for the 2015-16 school year. At the Sept. 30, 2015 student count date, actual enrolment for the year was 30 students higher than originally budgeted. As a result, both revenues and expenses were marginally higher than the spring budget. The budget presented for comparative purposes in this report is the Fall 2015 Budget Update which incorporates the finalized September 30 enrolment number. That budget update was accepted by the Board of Trustees on Dec. 1, 2015.

- A comparison of actual results to budget for 2015-16 highlights a number of specific variances.
- Over 91 per cent of CBE revenue comes from Alberta Education. Alberta Education funding received was higher than budgeted by \$4.5 million. The increase was due to higher Infrastructure, Maintenance and Renewal (IMR) activity than what was anticipated as well as higher revenue (with offsetting expenses) for the Alberta Teachers' Retirement Fund (ATRF).
- Non-Alberta Education revenue was \$116.9 million. This amount is comprised mainly of fees, school generated revenues and investment income. Non-Alberta Education revenue was \$18.7 million higher than budgeted due primarily to revenues generated from investment income as well as higher school generated revenues which are inherently variable, subject to school decision making, and fluctuate from year to year.
- \$4.7 million more was spent on salaries and benefits than planned due primarily to activities related to opening new schools in 2016-17, higher charges for the Alberta Teachers Retirement Fund and costs associated with the influx of an additional 500 refugee students.
- Due to more favorable results combined with increased capital activities, the actual net draws from operating reserves was only \$1.5 million.

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<sup>1</sup> Board and System Administration costs are specifically defined by Alberta Education's reporting manual and are included in Appendix AIV for reference.

## Operating Surplus

With the realization of investment gains along with prudent spending, the CBE reports a surplus of \$14.6 million. The \$32.5 million variance from the fall budget update reflects:

- \$9.3 million higher realized investment income due to favorable market conditions and actual gains realized;
- \$9.6 million net savings in salaries and benefits due to lower actual rates than estimated for the budget as well as savings resulting from position vacancies during the year;
- \$3.0 million in savings from resourcing efficacy reviews with existing staff;
- \$3.5 million net savings on contracts, system accounts and service unit spending;
- \$2.6 million in lower utility costs than budgeted due to both a reduction in usage and lower energy rates than anticipated;
- (\$2.4 million) in spending associated with unanticipated increase in refugee students; and
- \$6.9 million for projects budgeted in 2015-16 that were incomplete at year-end and the budget will be carried forward to 2016-17.

## Use of Surplus

The CBE has applied a prudent financial management practice due to concerns about future pressures and realized a surplus of \$14.6 million. This amount is transferred to and from reserves as follows:

- transfer (to) and from operating reserves totalling \$1.1 million:
  - \$8.2 million from unrestricted operating surplus;
  - \$(3.5) million to fiscal stability reserve;
  - \$(0.1) million from the transportation fee stabilization reserve;
  - \$(3.2) million to designated funds; and
  - \$(0.3) million to the EducationMatters Endowment Fund.
- investment of \$(15.7) million in board-funded capital.

The surplus means that the CBE's reliance on funding from operating reserves in 2015-16 was less than anticipated, making the reserves available to fund projects already planned, committed and in progress.

For detailed information regarding the source and use of school generated funds, interested parties should contact the school office.

A full discussion and analysis of the CBE's year-end financial statements and historical financial documents can be found at the following link subsequent to Board of Trustees approval, scheduled for Nov. 29, 2016: <http://www.cbe.ab.ca/about-us/budget-and-finance/Pages/default.aspx>

The provincial roll up of financial results can be found at:  
<https://education.alberta.ca/financial-statements/combined-statements>

## Program Expenditure Information

|  | 2015-16                                     |                             |                                      |                |  |                      |                  | 2014-15          |
|--|---|-----------------------------|--------------------------------------|----------------|--|----------------------|------------------|------------------|
|  | Instruction:<br>early childhood<br>services | Instruction:<br>grades 1-12 | Board and<br>system<br>adminstration | Transportation | Plant operations<br>and<br>maintenance | External<br>services | Total            | Total            |
| <b>Revenues</b>                                    |   |                             |                                      |                |  |                      |                  |                  |
| Alberta Education                                  | 51,856                                      | 925,487                     | 43,517                               | 35,027         | 152,907                                | -                    | 1,208,794        | 1,144,397        |
| Other government of Alberta revenue                | -   | 200                         | -                                    | -              | 463                                    | 70                   | 733              | 1,108            |
| Federal grants and education agreements            | -   | 997                         | 20                                   | -              | -                                      | 1,970                | 2,987            | 2,904            |
| Sales and services                                 | 579   | 19,910                      | 1,095                                | -              | 852                                    | 4,836                | 27,272           | 24,329           |
| Fees   | 158   | 27,889                      | -                                    | 8,173          | -                                      | 13,657               | 49,876           | 50,296           |
| Investment income                                  | -   | 324                         | 154                                  | -              | 258                                    | 11,410               | 12,147           | 14,863           |
| Other Alberta school authorities                   | -   | 375                         | -                                    | -              | 272                                    | -                    | 646              | 831              |
| Gifts and donations                                | -   | 8,699                       | -                                    | -              | -                                      | 42                   | 8,741            | 7,023            |
| Fundraising  | -   | 7,166                       | -                                    | -              | -                                      | -                    | 7,166            | 6,828            |
| Rentals  | -   | -                           | 445                                  | -              | 2,054                                  | 4,368                | 6,868            | 6,698            |
| Gain on disposal of assets                         | -   | 44                          | -                                    | -              | -                                      | -                    | 44               | 63               |
| Other revenue                                      | -   | 426                         | -                                    | -              | -                                      | -                    | 426              | 1,323            |
| <b>Total Revenues</b>                              | <b>52,593</b>                               | <b>991,516</b>              | <b>45,231</b>                        | <b>43,200</b>  | <b>156,807</b>                         | <b>36,353</b>        | <b>1,325,699</b> | <b>1,260,664</b> |
| <b>Expenses</b>                                    |   |                             |                                      |                |  |                      |                  |                  |
| Certificated salaries                              | 27,072                                      | 598,485                     | 1,153                                | 11             | -                                      | 375                  | 627,095          | 594,042          |
| Certificated benefits                              | 3,020                                       | 139,510                     | 84                                   | 1              | -                                      | 173                  | 142,788          | 134,485          |
| Non-certificated staff salaries                    | 12,464                                      | 108,011                     | 14,542                               | 2,141          | 49,774                                 | 13,760               | 200,691          | 197,091          |
| Non-certificated staff benefits                    | 3,127                                       | 26,026                      | 3,174                                | 563            | 12,959                                 | 2,783                | 48,632           | 47,608           |
| <b>Sub-total</b>                                   | <b>45,683</b>                               | <b>872,031</b>              | <b>18,952</b>                        | <b>2,715</b>   | <b>62,733</b>                          | <b>17,092</b>        | <b>1,019,206</b> | <b>973,227</b>   |
| Supplies and services                              | 2,595                                       | 101,459                     | 11,611                               | 44,171         | 70,078                                 | 3,217                | 233,131          | 217,687          |
| Amorization of supported tangible capital assets   | -   | -                           | -                                    | -              | 29,221                                 | -                    | 29,221           | 29,808           |
| Amorization of unsupported tangible capital assets | 666   | 14,201                      | 2,827                                | -              | 5,171                                  | 6                    | 22,871           | 21,837           |
| Supported debt interest                            | -   | -                           | -                                    | -              | 463                                    | -                    | 463              | 560              |
| Other interest and finance charges                 | 8   | 211                         | 111                                  | 202            | 257                                    | 261                  | 1,050            | 1,477            |
| Other expense                                      | 51  | 1,081                       | 46                                   | 1,359          | -                                      | 2,659                | 5,196            | 4,705            |
| <b>Total expenses</b>                              | <b>49,003</b>                               | <b>988,983</b>              | <b>33,547</b>                        | <b>48,447</b>  | <b>167,923</b>                         | <b>23,235</b>        | <b>1,311,138</b> | <b>1,249,301</b> |
| <b>Operating surplus / (deficit)</b>               | <b>3,590</b>                                | <b>2,533</b>                | <b>11,684</b>                        | <b>(5,247)</b> | <b>(11,116)</b>                        | <b>13,118</b>        | <b>14,561</b>    | <b>11,363</b>    |

## Budget Summary: Fall 2016 Update to the 2016-17 Operating Budget

On Nov 29, 2016, the Board of Trustees will be asked to receive the Fall 2016 Update to the 2016-17 Operating Budget reflecting total planned spending of \$1331.0 million, an increase of \$6.8 million from the approved budget, and authorize submission to Alberta Education.

The development of the 2016-17 Budget was guided by the CBE's values:

- Students come first;
- Learning is our central purpose; and
- Public education serves the common good.

The approved 2016-17 Operating Budget was prepared using a consultative process and focused resources on achieving the vision as articulated in the CBE values, the Three-Year Education Plan and guidance from Alberta Education.

In consideration of our values and the provincial revenue limitations, the overall expected outcomes for the 119,147 students in this budget are:

- Funds allocated directly to schools via the RAM have increased by \$24.2 million and are sufficient to maintain the current 2015-16 ratio of students to school-based staff, subject to principal deployment decisions.
- The RAM increase includes \$1.9 million for the addition of 13 additional system classes and the opening of six Early Development Centres to accommodate increased enrolment, refugees and student learning complexity.
- \$1.0 million will be spent in support of a strategy to effectively address the issue of how we can increase academic success for First Nations, Métis and Inuit learners. This increase is in addition to the continuation of the graduation coach program that began last year for senior high schools (\$1.5 million). We continue to focus on improving educational outcomes for CBE First Nations, Métis and Inuit students.
- \$11.0 million has been added to the budget for incremental operating costs associated with the opening of 15 new schools and the Aboriginal Learning Centre (\$6.0 million of which is part of the RAM increase). Additional costs relate to administrative staff in schools (principal, office staff, library staff, etc.) facility operations and maintenance staff and operating costs such as connectivity, insurance and utilities.
- Fee revenue will be increased by \$1.8 million year-over-year due primarily to enrolment growth.
- Fee revenue for noon supervision and Instructional Supplies and Materials (ISM) will fully fund direct program costs, including waivers and uncollectible accounts. There will be no contribution from the instructional budget to support these fee-based programs and services.  
Note | Alberta Education provides funding for transportation. There is no provincial funding for IS and Noon Supervision.
- The transportation program is currently budgeted to run at a deficit of up to \$2.2 - \$2.7 million, to be contributed from operating reserves. This decision was made following extensive public engagement that resulted in recommendations on the level of transportation services and fees. Further changes will be put in place for the 2017-18 school year with the ultimate objective that the transportation program will be self-sustaining (i.e. funded exclusively via targeted government grants and parent/guardian fees).
- The number of school-based teachers will increase by 201 full time equivalent positions and support staff by 48 full time equivalent positions.

- Non-facility capital project spending is budgeted at \$63.4 million, including \$3.5 million to support the commissioning of new schools scheduled to open in the 2017-18 year, \$7 million for wireless upgrades to address functionality issues, \$2.8 million for Career and Technology Studies/Foundations and \$7.2 million for the development and implementation of the new Student Information System (SIS) and \$23.7 million in capital designated funds for projects in progress at the end of 2015-16 that will continue in 2016-17.
- As required by law, the budget for 2016-17 is balanced.

The CBE's 2016-17 budget report can be found at the following location:

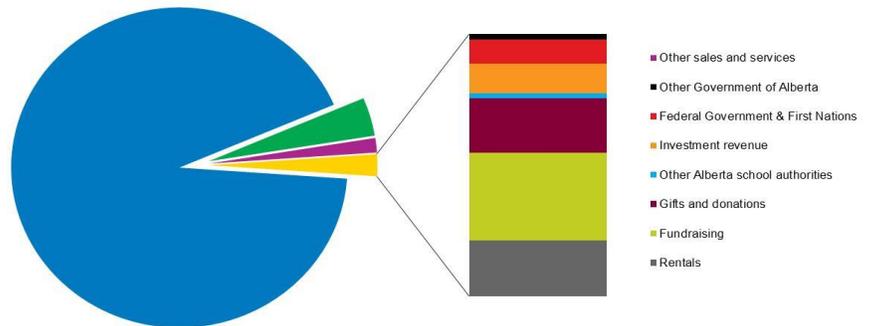
<http://www.cbe.ab.ca/about-us/budget-and-finance/Pages/default.aspx>

The fall update report will be submitted to Alberta Education immediately following its receipt by the Board of Trustees. It reflects financial support for the outcomes, strategies and actions articulated in the CBE's Three-Year Education Plan and forms the basis of the 2016-17 updated work plans for each of the CBE's service units and fall resource deployment by principals at schools.

Of the \$1,331.0 million in total expected revenues (not including approved transfers from operating reserves and designated funds) approximately 92 per cent, or \$1,230.7 million, is Alberta Education grant revenue. The total planned spending is \$1,350.8 million leaving a deficit of \$19.8 million, which will be funded from draws on reserves.

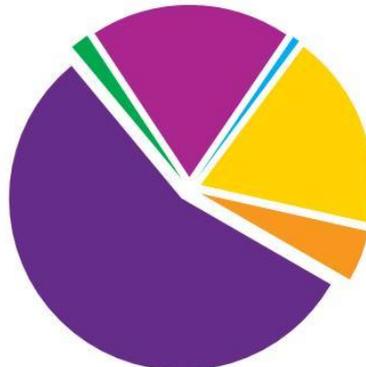
## Revenues

|                          | Fall Budget Update |             | Budget            |
|--------------------------|--------------------|-------------|-------------------|
|                          | 2016-17            |             |                   |
|                          | (in \$ thousands)  | %           | (in \$ thousands) |
| Alberta Education        | 1,230,690          | 92%         | 1,224,643         |
| Fees revenue             | 51,456             | 4%          | 51,047            |
| Other sales and services | 19,360             | 1%          | 19,111            |
| Other                    | 29,466             | 2%          | 29,347            |
| <b>Revenues</b>          | <b>1,330,972</b>   | <b>100%</b> | <b>1,324,148</b>  |



## Expenses By Type

|   | Fall Budget Update |             | Budget            |
|---|--------------------|-------------|-------------------|
|   | 2016-17            |             |                   |
|   | (in \$ thousands)  | %           | (in \$ thousands) |
| Certificated permanent salaries and benefits              | 751,779            | 56%         | 742,249           |
| Certificated temporary salaries and benefits              | 23,535             | 2%          | 23,386            |
| Non-certificated permanent salaries and benefits          | 253,696            | 19%         | 257,790           |
| Non-certificated temporary salaries and benefits          | 8,983              | 1%          | 8,540             |
| Supplies and services                                     | 247,869            | 18%         | 242,576           |
| Other (interest, amortization and uncollectible accounts) | 64,936             | 5%          | 69,433            |
| <b>Expenses by type</b>                                   | <b>1,350,798</b>   | <b>100%</b> | <b>1,343,974</b>  |



## Summary of Facility & Capital Plans 2016-17

Calgary has experienced high growth over the past decade. Calgary's population has increased by 139,979 persons in the last five years, an average of 27,996 persons per year. The current population is 1,235,171 people (2016 City Census). There are approximately 20 new developing communities as indicated in the City of Calgary's 2016 *Suburban Residential Growth 2016-2020*.

New school construction is necessary in outlying communities of the city to provide students with equitable access to instructional programs and to comply with the Board of Trustees' Governance Policies. New school construction priorities are approved by the Board of Trustees and these priorities are submitted to the provincial government in accordance with the annual School Capital Plan process.

The CBE's Three-Year School Capital Plan 2017-2020 was approved on March 8, 2016 by the Board of Trustees and can be found on the Schools Under Development page on the CBE Website at:

<http://www.cbe.ab.ca/FormsManuals/Three-Year-School-Capital-Plan.pdf>

The capital priorities for the three-year period covered by the plan consist of:

- 20 new school construction projects totaling \$478.5 million
- 13 major modernization projects totaling \$187 million

New school construction projects and school modernization projects previously approved by the province through CBE school capital plans as well as recently completed projects are listed below.

### Approved New Schools and Modernization Requests

In May 2013, the Provincial Government announced the approval of six new schools for the CBE to accommodate enrolment growth in Calgary's new and developing communities as part of the Building Alberta Schools Construction Program (BASCP). The six new schools consisted of three elementary, two middle, and one high school. In June 2014 the Provincial Government announced that they would not be pursuing the BASCP procurement package and that the new schools, with the exception of the North East High School, would be handed over to the CBE for development and construction. The construction process is now complete and these schools were opened for the 2016-17 school year:

- New Brighton School (Elementary)
- Copperfield School (Elementary)
- Kenneth D. Taylor School (Evanston Elementary)
- William D Pratt School (Royal Oak Middle)
- Peter Loughheed School (Saddle Ridge Middle)
- Nelson Mandela School (North East High School)

In February 2014 the Provincial Government announced funding for the development and construction of six additional schools for CBE as part of their commitment to build fifty new schools. The design development and pre-construction process is now complete. Construction was completed on 2 of the 6 schools for the September 2016-17 school year with the balance of construction anticipated for completion in the coming months.

- Auburn Bay School (Elementary) – Open September 6, 2016
- Marshall Springs School (Evergreen Middle )
- Buffalo Rubbing Stone School (Panorama Elementary) Open September 26, 2016.
- McKenzie Highlands School (McKenzie Towne Middle)
- Dr. Martha Cohen School (New Brighton/Copperfield Middle)
- Eric Harvie School (Tuscany Elementary)

In September 2014, the Provincial Government announced funding for four starter schools and the design development of a new high school in South East Calgary. These four starter schools would subsequently proceed as full build-outs for completion and opening in the 2016- 2017 school year and the high school in 2018/2019:

- Dr. Roberta Bondar School (Aspen Woods Elementary)
- Dr. George Stanley School (Cranston Middle)
- Hugh A Bennett School (Saddle Ridge Elementary)
- West Ridge School (West Springs/Cougar Ridge Middle)
- Seton High School (SE High School)

The completion of the Booth Centre for Chinook Learning Services was expected in the summer of 2014. Due to significant flood damage in June 2013 the development was abandoned and alternative concepts for the redevelopment of the site with the Calgary Municipal Land Corporation and developers were explored. A Land Use Re-designation Application has been submitted to the City and a Developer Expression of Interest will be issued.

In January 2014 the Provincial Government announced funding for four additional major modernizations which were completed in the 2016-2017 school year. Both Jack James and Bowness High Schools opened in September 2016, while Christine Meikle and Harold W. Riley will be completed in the coming months.

- Christine Meikle School (Replacement School)
- Harold W. Riley School (New Aboriginal Learning Centre)
- Jack James High School (Major Modernization)
- Bowness High School (Major Modernization)

In February & March 2014 the Provincial Government approved limited capital funding to rebuild Elbow Park School and flood mitigation funding for Rideau Park school, damaged by the 2013 Floods.

In October 2014 the Provincial Government announced funding for phase 3 of a consolidated advancement of education capital projects. This announcement which has subsequently been approved for full development provides the CBE with 3 new schools and two additional high school major modernizations for completion in the 2017/2018 school year.

- Manmeet Singh Bhullar School (Martindale Elementary School)
- Ron Southern School (Silverado Elementary School)
- Griffith Woods School (Springbank Hill/Discovery Ridge K-9)
- James Fowler High School Modernization
- Lord Beaverbrook High School Modernization

## Enrolment Program Overview

In the 2016-17 school year the Calgary Board of Education will provide programs and services in 242 schools, addressing the complexity and diversity of a population of 119,147 students.

| <b>Type and Number of Schools<sup>1</sup><br/>2016-17</b>                   |  |
|---|--|
| Elementary  | 140  |
| Elementary Junior or Middle   | 43   |
| Junior  | 17   |
| Junior Senior   | 3  |
| Senior  | 22   |
| Elementary Junior Senior <sup>2</sup>                                       | 1  |
| Unique Settings including Discovering Choices<br>Outreach at four locations | 16   |
| <b>Total</b>  | <b>242</b>   |
| <b>Notes</b>  |  |
| 1   | School is defined as an instructional setting with a unique school code assigned by Alberta Education. |
| 2   | Home Education   |

| <b>Student Enrolment<br/>as of Sept. 30, 2016</b> |                                     |
|---|-------------------------------------|
| Early Learning                                    | 178                                 |
| Kindergarten                                      | 9,125                               |
| Grades 1 to 3                                     | 29,410                              |
| Grades 4 to 6                                     | 25,715                              |
| Grades 7 to 9                                     | 23,292                              |
| Grades 10 to 12                                   | 26,443                              |
| Home Education                                    | 249                                 |
| Unique Settings                                   | 729                                 |
| Outreach Programs                                 | 1,337                               |
| Chinook Learning Services <sup>1</sup>            | 2,211                               |
| CBe-learn   | 458                                 |
| <b>Total Enrolment</b>                            | <b>119,147</b>                      |
| <b>Note</b>                                       |                                     |
| 1   | 767 students are over 20 years old. |

| <b>CBE Budgeted Employee Count<sup>1</sup><br/>2015-16</b> |   |
|--|---|
| Certificated <sup>2</sup>                                  | 6,228   |
| Non-certificated   | 3,382   |
| <b>Total</b>   | <b>9,610</b>  |
| <b>Notes</b>   |   |
| 1  | Reported as Full-Time Equivalents as of Sept. 30, 2015                                  |
| 2  | Excludes substitute teachers and staff on secondment or Professional Improvement Leave. |

# Program Overview

The CBE offers a depth and breadth of programs and supports to meet the unique learning interests and needs of our increasingly diverse student populations.

## Unique Settings and Outreach Programs Providing Specialized Services and Supports

- Alternative High School
- CBE Homeschooling
- CBe-learn
- Children's Village School
- Chinook Learning Services
- Christine Meikle School
- Discovering Choices Outreach: Bowness, Downtown, Marlborough, Westbrook,
- Dr. Gordon Townsend School at Alberta Children's Hospital
- Dr. Oakley School
- Early Development Pre-School
- Emily Follensbee School
- Encore CBE
- Jack James Pre-school.
- Louise Dean School
- Nexus
- Project Trust
- West View School
- William Roper Hull School
- Wood's Homes Schools – George Wood Learning Centre and William Taylor Learning Centre

## Specialized School-Based Programming for Students with:

- Autism
- Blind or Visual Impairments
  - Head Start Braille Program
  - Short-Term Classes at Vision Resource Centre
- Complex Needs
- Deaf and Hard of Hearing Needs
  - Aural/Oral Approach
  - Bi-lingual Approach – American Sign Language and English
  - Preschool for Deaf or Hard of Hearing
- Developmental Disabilities
- English Language Learning Needs
- Literacy, English and Academic Development Program
- Gifted and Talented Needs
- Learning Disabilities
- Mental Health Needs
- Social-emotional Needs

## Sports-Supported Learning Opportunities

- National Sport Academy
- National Sport School

## CBE-Supported Community-Based Programming

- Adolescent Day Treatment Program at Holy Cross Centre with Alberta Health Services (AHS)
- Alberta Adolescent Recovery Centre
- Alberta Alcohol and Drug Abuse Commission
- Calgary Youth Attendance Centre with Alberta Justice
- Community Psychiatric Unit at Wood's Homes Parkdale Campus with AHS
- Emergency Women's Shelter Liaison
- Enviros Wilderness Base Camp with AHS
- ExCel Discovery Program with Alberta Justice, AHS and Enviros
- Exceptional Needs Under 12 at Wood's Homes Parkdale Campus with AHS
- HERA Program with Boys and Girls Club of Calgary
- Young Adult Program at the Foothills Hospital with AHS
- Youth Community Support Program at Wood's Homes Parkdale Campus with AHS

## Pathway Categories and Programs

- Dual Credit
- Internships
- Off-campus Exploratory Programs
- Registered Apprenticeship Programs

## Alternative Programs

### Content program focus

- Arts-Centred Learning
- Juno Beach Academy of Canadian Studies
- Performing and Visual Arts
- Science Program

### Teaching philosophy programs

- Alice Jamieson Girls' Academy
- All Boys Alternative Program
- Montessori Program
- Traditional Learning Centre

### Language and culture programs

- Aboriginal Learning Centre
- French Immersion (Early and Late) Program
- German Bilingual Program
- Mandarin Bilingual Program
- Medicine Wheel Pre-school and Kindergarten
- Piitoyis Family School
- Spanish Bilingual Program

# Measure Evaluation Reference

## Achievement Evaluation

Achievement Evaluation is based upon a comparison of Current Year data to a set of standards which remain consistent over time. The Standards are calculated by taking the 3 year average of baseline data for each measure across all school jurisdictions and calculating the 5th, 25th, 75th and 95th percentiles. Once calculated, these standards remain in place from year to year to allow for consistent planning and evaluation.

The table below shows the range of values defining the 5 Achievement Evaluation levels for each measure.

| Measure                                    | Very Low      | Low           | Intermediate  | High          | Very High      |
|--|---------------|---------------|---------------|---------------|----------------|
| Safe and Caring                            | 0.00 - 77.62  | 77.62 - 81.05 | 81.05 - 84.50 | 84.50 - 88.03 | 88.03 - 100.00 |
| Program of Studies                         | 0.00 - 66.31  | 66.31 - 72.65 | 72.65 - 78.43 | 78.43 - 81.59 | 81.59 - 100.00 |
| Education Quality                          | 0.00 - 80.94  | 80.94 - 84.23 | 84.23 - 87.23 | 87.23 - 89.60 | 89.60 - 100.00 |
| Drop Out Rate                              | 100.00 - 9.40 | 9.40 - 6.90   | 6.90 - 4.27   | 4.27 - 2.79   | 2.79 - 0.00    |
| High School Completion Rate (3 yr)         | 0.00 - 57.03  | 57.03 - 62.36 | 62.36 - 73.88 | 73.88 - 81.79 | 81.79 - 100.00 |
| PAT: Acceptable                            | 0.00 - 66.07  | 66.07 - 70.32 | 70.32 - 79.81 | 79.81 - 84.64 | 84.64 - 100.00 |
| PAT: Excellence                            | 0.00 - 9.97   | 9.97 - 13.44  | 13.44 - 19.56 | 19.56 - 25.83 | 25.83 - 100.00 |
| Diploma: Acceptable                        | 0.00 - 73.77  | 73.77 - 80.97 | 80.97 - 86.66 | 86.66 - 90.29 | 90.29 - 100.00 |
| Diploma: Excellence                        | 0.00 - 7.14   | 7.14 - 13.15  | 13.15 - 19.74 | 19.74 - 24.05 | 24.05 - 100.00 |
| Diploma Exam Participation Rate (4+ Exams) | 0.00 - 31.10  | 31.10 - 44.11 | 44.11 - 55.78 | 55.78 - 65.99 | 65.99 - 100.00 |
| Transition Rate (6 yr)                     | 0.00 - 39.80  | 39.80 - 46.94 | 46.94 - 56.15 | 56.15 - 68.34 | 68.34 - 100.00 |
| Work Preparation                           | 0.00 - 66.92  | 66.92 - 72.78 | 72.78 - 77.78 | 77.78 - 86.13 | 86.13 - 100.00 |
| Citizenship                                | 0.00 - 66.30  | 66.30 - 71.63 | 71.63 - 77.50 | 77.50 - 81.08 | 81.08 - 100.00 |
| Parental Involvement                       | 0.00 - 70.76  | 70.76 - 74.58 | 74.58 - 78.50 | 78.50 - 82.30 | 82.30 - 100.00 |
| School Improvement                         | 0.00 - 65.25  | 65.25 - 70.85 | 70.85 - 76.28 | 76.28 - 80.41 | 80.41 - 100.00 |

### Notes

- 1 | For all measures except Drop Out Rate: The range of values at each evaluation level is interpreted as greater than or equal to the lower value, and less than the higher value. For the Very High evaluation level, values range from greater than or equal to the lower value to 100%.
- 2 | Drop Out Rate measure: As "Drop Out Rate" is inverse to most measures (i.e. lower values are "better"), the range of values at each evaluation level is interpreted as greater than the lower value and less than or equal to the higher value. For the Very High evaluation level, values range from 0% to less than or equal to the higher value.

## Improvement Table

For each jurisdiction, Improvement Evaluation consists of comparing the Current Year result for each measure with the previous three-year average. A chi-square statistical test is used to determine the significance of the improvement. This test takes into account the size of the jurisdiction in the calculation to make improvement evaluation fair across jurisdictions of different sizes.

The table below shows the definition of the 5 Improvement Evaluation levels based upon the chi-square result.

| Evaluation Category    | Chi-Square Range                                |
|------------------------|---|
| Declined Significantly | 3.84 + (current < previous 3-year average)      |
| Declined               | 1.00 - 3.83 (current < previous 3-year average) |
| Maintained             | less than 1.00                                  |
| Improved               | 1.00 - 3.83 (current > previous 3-year average) |
| Improved Significantly | 3.84 + (current > previous 3-year average)      |

## Overall Evaluation Table

The overall evaluation combines the Achievement Evaluation and the Improvement Evaluation. The table below illustrates how the Achievement and Improvement Evaluations are combined to get the Overall Evaluation.

| Improvement            | Achievement |            |              |            |            |
|------------------------|-------------|------------|--------------|------------|------------|
|                        | Very High   | High       | Intermediate | Low        | Very Low   |
| Improved Significantly | Excellent   | Good       | Good         | Good       | Acceptable |
| Improved               | Excellent   | Good       | Good         | Acceptable | Issue      |
| Maintained             | Excellent   | Good       | Acceptable   | Issue      | Concern    |
| Declined               | Good        | Acceptable | Issue        | Issue      | Concern    |
| Declined Significantly | Acceptable  | Issue      | Issue        | Concern    | Concern    |

## Category Evaluation

The category evaluation is an average of the Overall Evaluation of the measures that make up the category. For the purpose of the calculation, consider an Overall Evaluation of Excellent to be 2, Good to be 1, Acceptable to be 0, Issue to be -1, and Concern to be -2. The simple average (mean) of these values rounded to the nearest integer produces the Category Evaluation value. This is converted back to a colour using the same scale above (e.g. 2 = Excellent, 1 = Good, 0 = Intermediate, -1 = Issue, -2 = Concern).

## Accountability Pillar Overall Summary Annual Education Results Reports - Oct 2016 - Province: Alberta

| Measure Category  | Measure Category Evaluation | Measure                                    | Alberta        |                  |                     | Measure Evaluation |                        |            |
|---|-----------------------------|--|----------------|------------------|---------------------|--------------------|------------------------|------------|
|   |                             |  | Current Result | Prev Year Result | Prev 3 Year Average | Achievement        | Improvement            | Overall    |
| Safe and Caring Schools                                       | Excellent                   | Safe and Caring                            | 89.5           | 89.2             | 89.1                | Very High          | Improved Significantly | Excellent  |
| Student Learning Opportunities                                | Excellent                   | Program of Studies                         | 81.9           | 81.3             | 81.4                | Very High          | Improved Significantly | Excellent  |
|   |                             | Education Quality                          | 90.1           | 89.5             | 89.5                | Very High          | Improved Significantly | Excellent  |
|   |                             | Drop Out Rate                              | 3.2            | 3.5              | 3.5                 | High               | Improved Significantly | Good       |
|   |                             | High School Completion Rate (3 yr)         | 76.5           | 76.5             | 75.5                | High               | Improved Significantly | Good       |
| Student Learning Achievement (Grades K-9)                     | Good                        | PAT: Acceptable                            | 73.6           | 72.9             | 73.4                | Intermediate       | Maintained             | Acceptable |
|   |                             | PAT: Excellence                            | 19.4           | 18.8             | 18.6                | Intermediate       | Improved Significantly | Good       |
| Student Learning Achievement (Grades 10-12)                   | n/a                         | Diploma: Acceptable                        | 85.0           | 85.2             | 85.1                | Intermediate       | Maintained             | Acceptable |
|   |                             | Diploma: Excellence                        | 21.0           | 21.0             | 20.5                | High               | Improved               | Good       |
|   |                             | Diploma Exam Participation Rate (4+ Exams) | 54.6           | 54.4             | 53.5                | Intermediate       | Improved Significantly | Good       |
|   |                             | Rutherford Scholarship Eligibility Rate    | 60.8           | n/a              | n/a                 | n/a                | n/a                    | n/a        |
| Preparation for Lifelong Learning, World of Work, Citizenship | Good                        | Transition Rate (6 yr)                     | 59.4           | 59.7             | 59.3                | High               | Maintained             | Good       |
|   |                             | Work Preparation                           | 82.6           | 82.0             | 81.1                | High               | Improved Significantly | Good       |
|   |                             | Citizenship                                | 83.9           | 83.5             | 83.4                | Very High          | Improved Significantly | Excellent  |
| Parental Involvement  | Good                        | Parental Involvement                       | 80.9           | 80.7             | 80.5                | High               | Improved               | Good       |
| Continuous Improvement  | Excellent                   | School Improvement                         | 81.2           | 79.6             | 80.0                | Very High          | Improved Significantly | Excellent  |

### Notes

- 1 | Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- 2 | Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
- 3 | Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
- 4 | Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, and Social Studies 30-2.
- 5 | Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- 6 | Results for the ACOL measures are available in the detailed report: see "ACOL Measures" in the Table of Contents.
- 7 | Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 8 | Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 9 | Survey results for the province and school authorities were impacted by the changes in the number of students responding to the survey through the introduction of the OurSCHOOL/TTFM (Tell Them From Me) survey in 2014.



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# Budget Assumptions Report 2017-20



April 2017

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**Superintendent |**

Brad Grundy, CA CIA

Superintendent, Chief Financial Officer, Corporate Treasurer

**Contributors |**

Superintendents' Team

Finance / Technology Services staff

Communications staff

# Introduction

The Budget Assumptions Report (the BAR) is a key document on the path to developing the annual budget for the Calgary Board of Education (the CBE).

The BAR is a high level directional document that sets out the general operating context of the CBE as well as the financial and operating assumptions that will be built into the CBE's budget.

The BAR is presented to the Board of Trustees for information. Based on the BAR, the Board of Trustees has an opportunity to provide additional or alternative direction to the Chief Superintendent in the development of the annual Budget Report for the coming school year.

Additionally, the BAR is one of the primary means through which the CBE communicates to its students, parents, stakeholders and the community its intentions in developing the budget for the coming school year.

## Context

### Mission

The Board of Trustees sets as its Mission that **“each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.”** We therefore know that we must consider each individual student and his or her learning requirements while balancing all student needs against the resources available across the organization.

### Values

Administration's approach to the budget is guided by our values:

- Students come first
- Learning is our central purpose
- Public education serves the common good

We will work to optimize student learning while recognizing the reality of our fiscal constraints.

The 2017 Alberta Budget was delivered March 16, 2017 and provides funding for enrolment growth. This year the Provincial Government further announced a new fee replacement grant along with new restrictions on the charging of certain fees.

Our budget, built on the information and funding provided by Alberta Education, will set out how we will deploy and invest those financial resources to meet the needs of students in order to achieve the Results established by the Board of Trustees.

We are also guided by the CBE's Three-Year Education Plan, which focuses on personalized learning, building our professional capital, engaging our stakeholders and stewarding our resources. Taken together, these strategies allow us to optimize student learning and achievement.

In tackling the development of our budget we know that public education is a shared responsibility. With our students, families, employees, communities and Alberta Education in mind, we make budgetary decisions knowing we need to work together to build positive learning and working environments. By sharing a common goal of student success, each one of us contributes to making it happen.

#### Guiding Documents

- [Alberta Education Business Plan 2017-20](#) – Alberta Education's business plan provides an overview of the outcomes for the ministry and the key strategies to be completed to achieve those outcomes.
- [CBE Three-Year Education Plan](#) – Personalize learning, build professional capital, engage our public, steward our resources
- [CBE Results](#) – Our Mission, academic success, citizenship, personal development, character
- [Alberta Budget 2017: Making life more affordable](#) – The Alberta Government's fiscal plan for 2017 including new legislation on school fees and transportation services

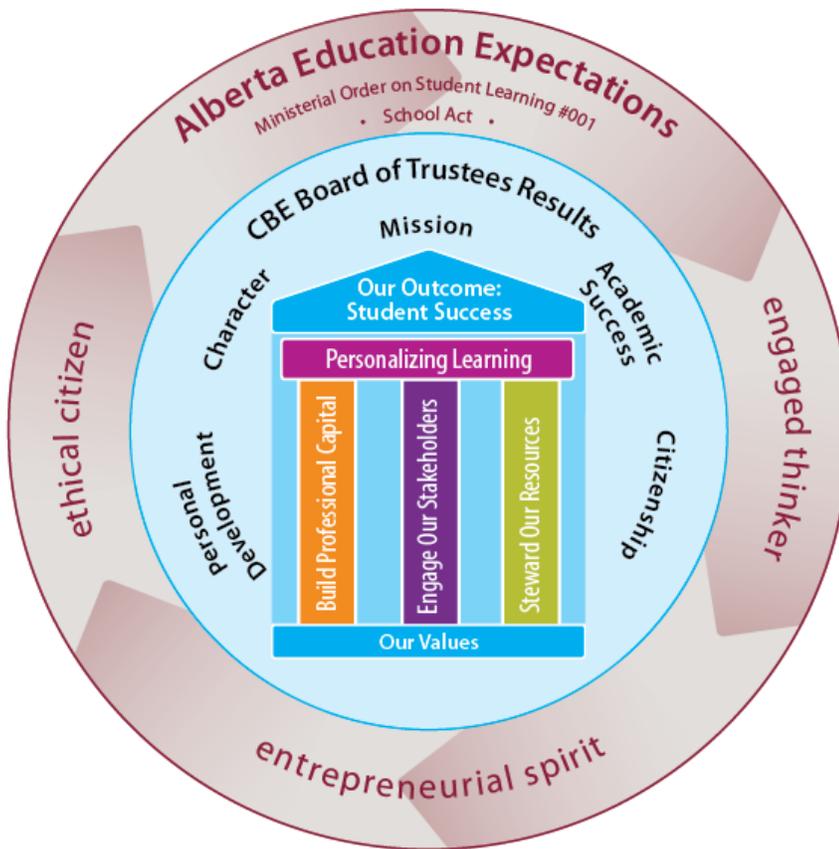
## CBE 2017-18 Budget

Schools: 247

Students: 121,200 (estimated)

Staff: 14,000+

Supporting



## Provincial budget impacts and implications

Over the past two years the CBE has benefited from the current Provincial support and commitment to public education. With over 93 per cent of our funding coming from the Province, even a small change in funding rates or funding methodologies impacts all our students, parents, teachers, and support staff.

The Provincial Government released its 2017 budget on March 16, 2017. In the 2017 budget the Alberta Government states its commitment to maintaining stability for public education by way of stabilized funding rates and continuing to meet its obligation to fund each student attending school in Alberta.

The level of funding the CBE will receive in 2017-18, while an increase over 2016-17 primarily due to enrolment growth, will not be sufficient to maintain services at levels similar to those provided in the 2016-17 school year. As we head into the 2017-18 school year we believe that we will have to make difficult choices to balance our budget.

### Bill 1: An Act to Reduce School Fees

The Provincial Government has committed to reducing the financial impact on families related to public education. On March 2 the Provincial Government introduced [Bill 1: An Act to Reduce School Fees](#). This legislation will impact service levels and fees for families beginning in the fall of 2017.

It is anticipated that Bill 1 will also significantly impact the ability of school boards to charge or increase school fees as the responsibility to define and approve school fees will shift to the Minister of Education from local school boards.

We still have many questions about this legislation. We are working with the government to seek clarification and work through the details. For this report, we have made our best estimates and will construct our budget based on those estimates. As additional information becomes available from the Provincial Government we will adjust our plans accordingly.

#### Transportation Services and Fees

In 2016-17, approximately 38,000 CBE students travel to school daily on yellow buses, Calgary Transit, taxi, and/or Handi-bus. Of those, approximately 26,000 ride a yellow school bus. These riders are typically in kindergarten – Grade 9 attending a regular program or students with complex

transportation needs (about 50 per cent of riders) or in an alternative program (approximately 50 per cent). In the transportation engagement last year we heard from parents that they wanted shorter travel distances to a yellow school bus stop. Our current CBE guidelines for yellow school bus transportation are that elementary students will access a stop within 1.6 km of their homes and middle school/junior high students will access a stop within 1.8 km of their homes. In the current 2016-17 most students in a regular program and the larger alternative programs have stops within 1,000 m from home. We can do this because of the density of students within a community accessing these schools and programs. Some exceptions may occur due to the geographic location of some student addresses. Students in some non-language alternative programs access congregated stops where it is not feasible financially to do otherwise. For 2016-17 the fee for a yellow school bus rider is \$335/year. Based on what we heard from the engagement, the fee is the same for all riders, regardless of program or distance travelled to school.

In a [letter](#) to parents on March 3, 2017 about Bill 1, the Minister of Education outlined some details about changes to transportation. At that time he wrote:

“Bill 1, if passed, will also remove bus fees for eligible students traveling to their designated school. That means that if your child attends his or her designated school and that school is more than 2.4 kilometres away from your home, you will not be charged transportation fees. In some circumstances – for example, if parents choose to enrol their child in a school other than their designated school – fees may still be incurred.”

We are working with the government to better understand the impact of this legislation for our families. Our analysis indicates that a minority of students who currently ride a yellow school bus will not pay busing fees under Bill 1. Service levels will also be affected.

Until we understand the impact on fees and service levels for our families, transportation pre-registration cannot begin. We had planned to begin in late April. However, with the introduction of Bill 1 this process will be delayed. Early registration helps us plan our routes more efficiently resulting in fewer changes in the fall. It also allows us to share more accurate route information with our families sooner.

During our engagement last year families clearly stated they wanted information on transportation – including service levels, stop locations and timings – as early as possible to begin planning for the next school year. We will continue to provide updates to our parents as more information becomes available.

### Instructional Supplies and Materials (ISM) fees

Under Bill 1, school boards will no longer be able to charge a fee for instructional supplies or materials such as textbooks, workbooks, printing and paper costs.

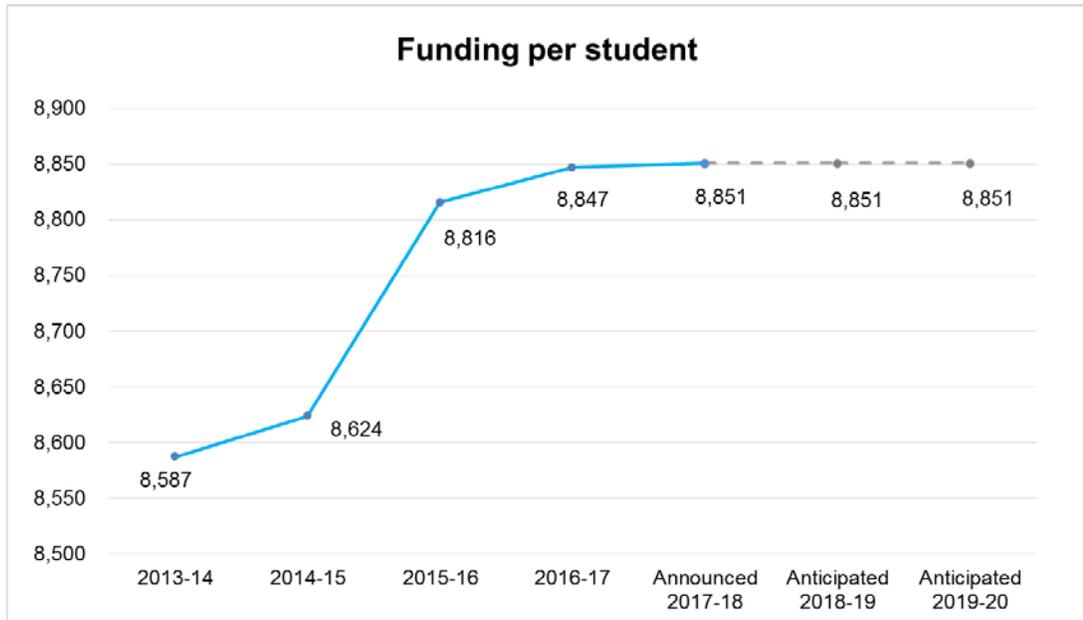
We are seeking clarification on instructional supplies or materials (ISM) fees. We need to understand if this includes bulk purchase of schools supplies for students in kindergarten – Grade 6. The current ISM fee is essentially the “pass-through” of the cost of bulk buying student supplies (pens, pencils, binders, etc.). It is our understanding that those costs will not be covered under Bill 1 and that parents will continue to pay for the costs of school supplies. Students in Grades 7 through 12 should, however, see a fee reduction.

### Other impacts and cost pressures

We will see costs increase in 2017-18 for the operation of four new schools, grid movement in accordance with collective agreements as well as inflation and escalating costs of contractual obligations such as insurance premiums, software licenses and fees, utilities, etc. To maintain current service levels across the CBE in 2017-18, we would require a 4.8 per cent rate increase in base instruction funding. With enrolment-only funding there will be decreases in service levels across the system to balance the budget for 2017-18.

‘Funding per student’ is used as a measure of the amount of funding Alberta Education has been providing on a per-student basis. For a number of years prior to 2013-14, this amount had been declining. We saw an increase in 2015-16 with the election of a new Provincial Government. The amount is expected to remain flat into 2017-18 and future years.

The chart below shows funding per student using actuals for the years that have ended and estimates for the current year and future years. Funding does not include amounts for Infrastructure Maintenance & Renewal (IMR), the Alberta Teachers' Retirement Fund, transportation grants, fees subsidy or expended deferred capital revenues, as these grants are targeted and do not fund regular operations.



## Balancing Strategy

Following the funding commitment by the Province and based on the assumptions discussed in this report, the CBE is facing a **\$38.6 million deficit** in the 2017-18 year before the application of available reserves, other one-time funding contributions and/or cost reductions. This report will discuss the assumptions used for budget planning, our plans to cover the shortfall and risks involved in our balancing strategy.

### Projected budget before cost reduction strategies applied

Guided by our Values, our Mission, and our focus on Results, we always look to maximize the dollars directed towards students and their success. “Students come first” has always been the CBE’s top value and therefore our priority. In 2017-18 we will balance our resources to support student learning while meeting legislative requirements and the Board of Trustees’ operational expectations. Bill 1 will challenge our ability to respond to the choices our parents told us they value; however, we will continue to support the Provincial Government’s intention to lessen the fee burden on families.

Reducing spending by \$38.6 million means that we cannot continue to do everything in the same way or deliver the same level of service as in 2016-17. Many cost reducing strategies have been considered and evaluated using the following decision-making criteria established by Superintendents’ Team:

- Meets the CBE’s mandate/mission and supports our values and aligns with our foundational documents.
- Advances our learning agenda.
- Enables the personalization of learning.
- Builds our professional capital.
- Supports well defined, effective, efficient business processes.
- Ensures infrastructure and environments that enable learning.
- Leverages other community resources that serve overlapping populations or is a shared responsibility.
- Viable from the perspective of stakeholders.

The 2017-18 budget will be prepared using a system-wide, balanced approach to reducing costs and directing resources to priorities that meet the criteria established above.

Many programs, services, and supports were evaluated during the development of this Budget Assumptions Report. The changes proposed to reduce costs will be fully disclosed in the 2017-18 Budget Report scheduled for presentation to the Board of Trustees in May 2017.

## Examples of budget balancing strategies considered but not necessarily approved

All budget lines have been examined during this budget preparation process. These are some examples of programs, services and supports that were considered, but not necessarily approved for action:

- Approximately \$11 million in budget allocation reductions to schools. An \$11 million reduction to the schools budget represents approximately 1.4 per cent of the total that would have been required to fully maintain service levels in schools. Reductions considered include general per-student allocation rate reductions combined with specific allocation reductions that are unique to certain schools or programs. See pages 17 -19 for specific budget reductions that are planned to be effective for the April 6 RAM (Resource Allocation Method) roll-out.
- The viability of continuing to offer full day kindergarten was assessed. Alberta Education offers half day programs and does not currently provide funding for full day kindergarten. We considered reducing the number of sites offering full day kindergarten.
- The Provincial Government funds school jurisdictions for five years of English Language Learner (ELL) support. This is a reduction from the seven years of support provided as recently as 2013. Currently the CBE provides ELL supports for seven years. We assessed the impact of a reduction to the English Language Learner RAM allocation for years six and seven supports. To better align services offered with direction from the Province, we considered reducing our level of supports in 2017-18.
- The Provincial Government's Plant, Operations & Maintenance (POM) funding has not covered the actual cost of plant operations and maintenance for many years. The CBE invested approximately \$16 million from the global budget to fully fund plant operation and maintenance costs in the current year. In contemplating budget 2017-18 we evaluated the ability to reduce the POM subsidy from the global budget by \$5 million. We also considered ways to maximize the use of the annual IMR funding to offset some of the impacts associated with a reduction in the global budget subsidy to POM.
- Taking a whole system approach, we evaluated the prudence of applying a reduction of approximately 3.7 per cent to each of our service units. The original target was 3.0 per cent, however, after removing items such as amortization or contractual obligations that are difficult to reduce in the short-term, the targeted reduction was calculated to be 3.7 per cent.
- A reduction of the CBE's contribution to EducationMatters was considered.

- Given that Facilities and Environmental Services (FES) is the second largest service unit after Schools and Areas we evaluated the following actions:
  - With the wind-down of construction activity, FES will refocus its efforts on operating and maintaining the CBE's more than 250 separate facilities. To support this refocusing, FES will explore the transfer of responsibility for new school construction almost exclusively to Alberta Infrastructure.
  - FES responsibility for undertaking major modernization work will be evaluated on a case-by-case basis. This would necessitate maintaining a very close working relationship with Alberta Infrastructure to ensure the best possible outcomes for CBE students.
  - Movement to a customized cleanliness standard that will assist in effectively deploying resources.
- A range of reduction strategies in all other service units in the amount of \$2.6 million (approximately 3.7 per cent) of their operating budgets were evaluated. At the time this report was written, specific decision-making is underway related to nature and content of the proposed reduction strategies.
- The long-service recognition program for staff was assessed.
- We contemplated an increase in student parking rates equivalent to the cost of a monthly Calgary Transit bus pass.
- We assessed a number of minor program and process changes aimed at shaving costs. For example, the elimination of the option to receive a paper pay stub.
- Given the ready availability of free flu vaccine across the city, we assessed the annual flu shot program for staff.
- We assessed board funded capital spending with a target of reducing the available funding by \$5 million.
- We reviewed our transportation program in light of Bill 1 and the recent in-depth public engagement to contemplate the elimination of the transfer from the global budget. In 2016-17 this transfer amounted to \$2.1 million and \$5 million in the planning budget.

In addition, actions were identified that will provide cost savings either in the course of the 2017-18 year or in the longer term. These included:

- Review of principal positions for schools with low enrolment. These positions will be considered for merging with another school principal.
- Review of employee benefits programs and exploration of alternative benefit providers with the goal of maintaining benefit levels and lowering costs.

- Review schools with low enrolment and utilization rates to optimize the use of learning space commensurate with pedagogical need and available financial resources.
- Implement technology to student/staff ratios consistent with pedagogical needs and available funding levels. As well, the CBE will look to reduce the average unit cost of technology through a rigorous review of need.
- Continue to expand the implementation of the “on-demand” technology support model currently used by 50 elementary schools.
- Review the scope of our community engagement activities in light of available levels of resourcing.
- Repatriate payroll services from outsourcing to achieve long-term savings.
- Align school start and end times across the CBE to achieve transportation system efficiencies and ensure the largest number of students can benefit from sustainable levels of transportation service.
- Work with Alberta Education to define basic education and the appropriate level of funding required to meet student and parent expectations.

## Anticipated and approximate 2017-18 high-level budget

The information presented below is our best estimate as to how the 2017-18 budget might look, given the balancing options currently being evaluated. There continue to be some unknown factors, specifically regarding Bill 1, and as such the final proposed budget for 2017-18 may differ from what is presented below.

|   | (in \$ thousands)                         |   |                                  |
|---|---|---|----------------------------------|
|   | <b>Fall Budget<br/>Update<br/>2016-17</b> | <b>Anticipated<br/>Budget<br/>2017-18</b> | <b>Increase /<br/>(Decrease)</b> |
| <b>Revenues</b>   |   |   |                                  |
| Alberta Education   | 1,230,690                                 | <b>1,271,533</b>                          | 40,844                           |
| Other Government of Alberta                                     | 618                                       | <b>345</b>                                | (273)                            |
| Federal Government & First Nations                              | 2,650                                     | <b>2,650</b>                              | -                                |
| Other sales and services  | 19,360                                    | <b>25,115</b>                             | 5,755                            |
| Fees revenue  | 51,456                                    | <b>36,732</b>                             | (14,724)                         |
| Investment revenue  | 3,345                                     | <b>3,167</b>                              | (178)                            |
| All other revenue   | 22,853                                    | <b>20,148</b>                             | (2,705)                          |
|   | <b>1,330,972</b>                          | <b>1,359,690</b>                          | 28,718                           |
| <b>Expenses by object</b>                                       |   |   |                                  |
| Salaries and benefits   | 1,037,994                                 | <b>1,065,063</b>                          | 27,069                           |
| Supply and services   | 247,869                                   | <b>230,269</b>                            | (17,600)                         |
| Amortization expenses   | 57,370                                    | <b>67,339</b>                             | 9,969                            |
| Interest and finance charges                                    | 2,123                                     | <b>1,865</b>                              | (258)                            |
| Other (uncollectible accounts)                                  | 5,443                                     | <b>5,475</b>                              | 32                               |
|   | <b>1,350,798</b>                          | <b>1,370,011</b>                          | 19,213                           |
| <b>Expenses funded through reserves or capital transactions</b> | <b>(19,826)</b>                           | <b>(10,321)</b>                           | 9,505                            |

# Assumptions

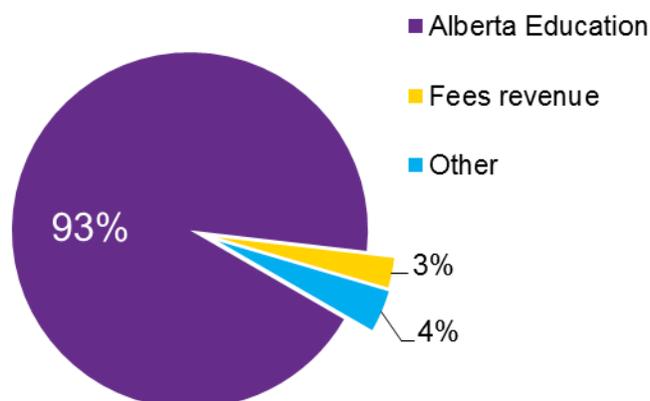
## General Assumptions

The CBE's 2017-18 budget assumes:

- We will be guided by the CBE's Mission, operational expectations and values. Our values are:
  - Students come first
  - Learning is our central purpose
  - Public education serves the common good
- Parents and students will continue to make program choice decisions similar to those made in 2016-17.
- We will meet the requirements of the new Bill 1 legislation impacting student fees and transportation service within the incremental funding provided.
- We will take a balanced CBE-wide approach, bearing in mind that all work is done in support of student learning. This means that the budget will ensure that the organization can continue to provide basic supports to comply legal and regulatory requirements as set out in the [School Act](#) and, to the extent we are able, with the Board of Trustees' mandated Operational Expectations.
- We will derive guidance from the direction provided by Alberta Education, the CBE's Results and the Three-Year Education Plan. Priorities are:
  - Continue to optimize student success by improving the quality of teaching and learning in the classroom by focusing on:
    - Personalizing learning.
    - Advancing leadership practices.
    - Implementing K-12 mathematics and literacy strategies.
    - Implementing the High School Success strategy.
    - Improving results for First Nations, Métis and Inuit students.
  - Within the context of personalized learning as the overall learning strategy, we will create conditions for success and have a positive impact on the learning outcomes of students by:
    - Building, maintaining and modernizing schools to foster enriching learning environments for all students.

- Developing and implementing a student information system that provides greater access to and use of student profile data for students, families, teachers and leaders, supports best practices in assessment and grading and creates administrative efficiencies.
  - Continuing to use our public engagement framework (dialogue framework) to guide decision making and to ensure stakeholders are reasonably included in decisions that affect them.
- We will continue to recognize that school principals, working with their school communities, are best positioned to make the ultimate school-based decisions related to staffing, resourcing and program enhancement.
- Consistent with our values, we will minimize to the extent possible reductions to general school funding allocation rates as set out in the RAM.
- We will continue to provide safe, healthy, and supportive learning environments for students and staff.
- We will allocate sufficient Board Funded Capital to meet the priorities established by our Three-Year Education Plan. These projects include program moves and expansions, software programs, and equipment used by facility operations staff operations to maintain our schools. These are the capital costs of running a school system.
- We will maintain, to the extent possible, the systems and processes that allow the CBE to attract, retain, and pay our employees.
- We will apply prudence in the use of projected available-for-use reserves and other one-time funding sources.
- We will continue to minimize all known “conservatism” in estimates and projections in order to maximize resources available to support students and their learning. As a result, there is an increased probability of an overall negative variance between the budget plan and actual results at the end of 2017-18.
- We will take all steps necessary to avoid operating and fiscal jeopardy as directed by the Board of Trustees.

## Revenue Assumptions



Alberta Education will fund the CBE as follows:

- Alberta Education maintains its funding [formula](#), which is based on projected enrolment for Sept. 30, 2017.
- Alberta Education maintains funding rates at 2015-16 levels with the exception of changes to the funding rate for Credit Enrolment Units (CEUs), which are anticipated to have minimal impact on the CBE.

Our revenue assumptions are:

- We will calculate provincial funding using the funding formula provided to us based on our 2017-18 enrolment projections.
- Any cost increases (for example, wages, benefits or working conditions) negotiated with the Alberta Teachers' Association (ATA) will be fully funded by additional Alberta Education grants. The collective agreement expired on Aug. 31, 2016, and we have assumed the Provincial Government will fully fund the cost of any salary, benefit, or work-load changes resulting from upcoming collective bargaining.
- We will apply Alberta Education targeted/restricted funding for the specified purpose.

- Fees
  - All revenue from Alberta Education related to transportation and ISM will be fully applied to the cost of these services. There will be no contribution from the global budget to support fee-based programs and services. Fee revenue for transportation and instructional materials and supplies will fully fund the gap between Alberta Education funding and direct program costs, including waivers and uncollectable accounts.
  - Currently there is no provincial funding for the Grade 1 – 6 noon supervision program. This program is solely funded by student fees. Approximately 50,200 Grade 1-6 students are registered and supervised through the noon hour program in CBE schools (April 2016 estimate). For the 2017-18 year noon supervision fees will be maintained and service levels adjusted due to increased labour costs.
  
- Opportunities to grow non-Alberta Education revenue will be explored where it is consistent with our vision and values. Although important work, we do not anticipate this will have a material impact on overall CBE revenue.
- We will continue to receive \$1 per year per facility lease with charter schools as determined by Alberta Education.
- Facility rental rates charged will break even (cover incremental direct costs) as set out in CBE's Administrative Regulation 8004 and by agreement with the Calgary Separate School District and the City of Calgary.
- Revenue from the sale of CBE-owned properties, if any, will be applied to upgrade and modernize existing facilities to support student learning.
- The CBE will continue to participate in the Joint Use Agreement framework with the City of Calgary and the Calgary Separate School District respecting land and schools.
- Investment income, interest and dividend income on CBE cash balances will be assumed to accrue at a rate averaging between two and three per cent on the medium to long term investments. Short-term investments will average one per cent, subject to changes in the Bank of Canada rate. Overall return on the medium and long term investments, including capital growth and investment income, is assumed to be four to six per cent. Investment returns will be devoted to enhancing student outcomes.

## Expense Assumptions

Our expense assumptions are:

- The budget will ensure that the CBE is able to comply with all conditions within collective agreements including general wage increases (where applicable), employee salary grid movement and benefits changes. The CBE will follow the Province's lead on future negotiations with our unions and associations.
- The additional cost of operating four new schools has been included which approximates \$2.3 million for 2017-18. These costs relate to school-based administrative staff and operating costs such as internet connectivity, insurance and utilities.
- Over the two school years from 2016 through 2018 the CBE's fixed operating costs, due to the opening of more than [19 new schools](#), have increased by more than \$13.8 million. As we are funded based on students rather than facilities, this increase is largely unfunded.  
  
The CBE will continue to work with Alberta Education on funding for issues such as this that are outside of regular operating activities. Additional resources for school custodial and maintenance activities have not been added due to funding constraints.
- Any additional costs related to delayed school openings or transitional supports required for impacted schools will be provided for as resources allow.
- Amortization of board-funded capital assets has increased by \$3.9 million due to increased capital expenditures in 2016-17.
- While Alberta Education has maintained grant funding rates at 2015-16 levels, the CBE continues to experience non-discretionary cost increases (such as for contractual obligations or the increase in currency exchange where contracts are in non-Canadian dollars), which have been reflected in our projections.
- The CBE has system administration costs of approximately 2.7 per cent which is well below the provincially mandated cap of 3.6 per cent of total expenditures. This means that \$11.8 million of the allowable administrative allocation is made to fund other supports to students.
- 2017-18 school budget allocations are expected to be sent to principals on April 6 using the Resource Allocation Method (RAM). For the 2017-18 school year we anticipate that more than \$813 million will be deployed through the RAM to support students; this is a \$12.5 million (1.6 per cent) increase over 2016-17.

The following changes will be made within the RAM and centralized school supplies budget for the 2017-18 school year in comparison to 2016-17:

- RAM allocations are provided to four new schools opening during the year: Ron Southern School, Manmeet Singh Bhullar School, Marshall Springs School and Griffith Woods School.

- Per-school allocation rates have been increased to correspond with the increased cost for which these allocations are intended (school principal, administrative support, learning commons staff, etc.).
- Per-student allocation rates would have needed to increase by 0.25 - 0.54 per cent (depending on allocation type) to maintain the ratio of student to school-based staff, but will instead be reduced by 0.42 - 0.83 per cent to reduce the overall RAM budget by \$7.7 million.
- School furniture and equipment and basic decentralized allocations will be eliminated for one year. Principals have been encouraged to suspend these types of purchases for one year and focus remaining budget dollars on staffing.
- A moratorium will be placed on school-based software purchases except through the approved centralized process to reduce costs across the system.
- The CBE will continue to offer full-day kindergarten at fifteen locations. Research indicates that full-day kindergarten programming provides significant educational benefits for certain vulnerable groups that actually reduce costs in the longer-term.
- Support for our large and growing English Language Learner population will be continued with the provision of support for two years beyond the five years for which we are currently funded. The longer-term benefits outweigh the short-term costs.
- The allocation enhancement for resources provided to schools with alternative language programs will be eliminated for 2017-18. This amount had been provided to support the increased costs of resources in languages other than English as well as to support the purchase of resources in both English and a second language. An amount will be provided to the Area Offices to support schools in this regard, should an emergent need arise in 2017-18.
- The Aboriginal per-student RAM allocation will be maintained in 2017-18. Consistent with the direction set out in the Indigenous Learning Strategy, centralized supports were added in the 2016-17 year with the intention that the per-student RAM allocations would be discontinued in 2017-18. The transition will be extended by one year.
- The CBE remains committed to supporting its most vulnerable students. In an effort to manage these costs, budgets will be reallocated between programs and reductions made in response to changing student needs. The changes identified are those that are assessed to have a lower impact to students. These include:
  - 30 Literacy, English, and Academic Development (LEAD) classes will be offered.
  - Reduce costs by continuing to optimize enrolment in specialized classes.

- Reduce costs by continuing to optimize additional resources allocated at unique setting schools.
- Reductions in the scope of contracted services provided for students with complex learning needs.

## Reserve Assumptions

The Board of Trustees has final authority on the deployment of reserves and therefore these assumptions are subject to approval by the Board.

- The budget will be based on the assumption that the CBE will end the 2016-17 school year with operating reserves of approximately \$17 million and \$13 million in capital reserves.
- Given the anticipated continuation of new school construction, the CBE will retain modest operational reserves to fully support the commissioning of approved new schools. Based on recent activity, the CBE spends approximately \$0.6 million to commission an elementary school and \$0.9 million for a middle school.
- The amount of reserves available for use in 2017-18 is also contingent upon the funding request made to the Province to cover the cost of project management services associated with new school construction projects. We anticipate a final answer on these requests upon submission to Alberta Education of the statements of final costs associated with each project.

Given the above, we anticipate that we will be able to allocate up to \$5 million in operating reserves to balance the 2017-18 budget.

- There will be no funds available in the Transportation Fee Stabilization Reserve to help fund the cost of the program in 2017-18.
- The CBE will continue to maintain reserves at one of the lowest levels relative to other school jurisdictions. The CBE is committed to investing government funding in the students using the system in the year that the funding is received.

## Capital

The CBE appreciates that the Provincial Government has recognized the incredible growth in our student numbers and is building many of the schools required to support the growing educational needs of our students. During the past year the CBE has opened 20 new, replacement and modernized schools and has seven more projects underway with opening dates scheduled for 2017 and 2018. Three more new schools and one major modernization were announced on March 21, 2017.

While good news, each new school announcement required the CBE to find additional funds beyond those provided by the Province for furniture, fixtures and equipment. These costs include preparing the learning environment with learning materials, sound systems, specialty equipment and technology. Other costs are related to the staff time (principals, assistant principals, learning leaders, administrative assistants, etc.) required to engage with the new school communities, develop time tables, and make pre-opening curricular decisions. In all, the CBE has made over \$25 million available to support these new school commissioning costs to date.

The Province has changed its process for funding new school and modernization activities as a result of the Report of the Auditor General dated April 2016: [Education and Infrastructure – Systems to Manage the School-Building Program](#). Where costs are being incurred in excess of construction tenders, but within the total approved funding amount, and to pay for the project management components of the projects, further funding requests must be made to the Province. At this time, the CBE has received approval for \$1.8 million (for building permits and services connections) of the \$8.2 million in additional costs requested. The Province has indicated that the project management expenses may be considered for additional funding upon submission of the Statement of Final Costs for each project. A risk exists that these amounts will not be approved and the CBE will need to fund these additional costs from operating resources.

Nevertheless, the 2017-18 budget balancing strategy will include two strategies related to board funded capital funding.

First, the CBE will allocate \$5 million in board-funded capital funding to support ongoing operations. This will require careful prioritization of capital requests. Currently capital requests exceed available capital funding by approximately \$16 million. The highest ranked board-funded capital project is the replacement of our out-dated and non-PASI (Provincial Approach to Student Information) compliant student information system.

Second, the CBE will move to maximize the use of IMR funding consistent with guidance provided from Alberta Education. This will relieve pressure on the board funded capital budget and allow approximately \$5 million to be directed towards supporting operations. The stated objective of this shift is to fully expend IMR funding received to adequately maintain and renew our continually aging facilities.

## Budget engagement

The CBE requested input from parents, staff, other stakeholders and the public related to the 2017-18 budget and beyond. We requested feedback in various venues and formats:

- meetings with union representatives (ATA, Staff Association, CUPE, Skilled Trades Union)
- meetings with principal associations (Elementary School Principals Association, Principals' Association for Adolescent Learners, Senior High School Principals Association)
- meeting with the Council of School Councils (COSC)
- online comments

In February/March 2016 we embarked on a larger budget engagement and continue to combine this feedback with that received in 2017. Our public still places a priority on maximizing resources in the classrooms. We continue to honour this in 2017-18 by maintaining one of the lowest Board and System Administration expenditures in Alberta, enabling our funding to be dedicated to student learning.

We also maximize resources by centralizing many supports, enabling principals and teachers to focus on teaching and learning.

We continue to improve our budget-related communication with our stakeholders. [Our website](#) includes a great deal of budget information, including reports, staff communications, and speaking notes. Chief Financial Officer Brad Grundy continues to respond to comments on “Dollars and Sense with CFO Brad Grundy,” where issues such as classroom funding and staffing are addressed head-on.

Comments are accepted year-round through our [budget feedback form](#) and all comments are read by our finance team.

## Operational Impacts

We expect services and support levels to students, parents and schools to be reduced from those experienced in 2016-17. Schools will be directly impacted. The majority of schools will see approximately a one per cent reduction to their budgets from what they needed to maintain their staffing and operations at levels similar to those provided in 2016-17.

The impact of service unit reductions will be felt broadly across the organization as we may have difficulty providing the same response time and supports our schools have come to expect. We have tried to balance the reductions across the organization to minimize the direct impact on students while still meeting our legislated obligations. There is an increased risk to our ability to achieve compliance with the Board of Trustees' Operational Expectations (OEs).

At the time this report was written, the decision-making process for service unit budget reductions was underway. A full description of operational impacts will be provided in the Budget Report which is currently scheduled for presentation to the Board of Trustees in May, 2017.

## Opportunities and Risks

The biggest opportunities presented by these assumptions are that the resulting budget will enable the opening of four new schools and that some parents will see reductions in the amount they pay in fees. This budget will continue to prioritize support to our students and staff and the reliable achievement of the Board's Results consistent with the values of:

- students come first
- learning is our central purpose
- public education serves the common good

The assumptions included in this report were developed based on the best information available at the time. Given that assumptions have been made and there are uncertainties in the related estimates, there is a risk that actual results may differ. Notable risk areas include:

- The budget is lean and minimal contingency has been built into our estimates. Choices made in reaching the final budget may impact students and/or the achievement of operational expectations. We are committed to making every effort possible to reduce impacts on learning.
- Actual costs may be higher than assumed. We are planning in April for a budget year that does not begin until September. Specific areas of concern include the cost of utilities, wages, insurance premiums and uninsured losses.
- There is an increased risk that the CBE will end 2016-17 in a less favourable position than forecast due to the elimination of conservatism in our budgeted estimates, which will impact the availability of reserves in 2017-18.
- As the deferred maintenance backlog continues to grow, our facilities will be more susceptible to extreme weather events and mechanical and structural failure. This reality could increase costs beyond assumed levels. A focus on fully committing IMR funding received should allow us, in part, to manage this risk.
- The ATA Collective Agreement expired on Aug. 31, 2016 and negotiations continue with the Teachers' Employer Bargaining Authority (TEBA). While we assume that any wage increases will be specifically and incrementally funded by the Provincial Government, other negotiated terms could have a significant financial impact on the CBE that is not incrementally funded.
- Collective agreements with all other unions have a wage re-opener clause for the period from Aug. 31, 2016 to Aug. 31, 2017. This wage re-opener discussion is contingent upon the ratification of the ATA agreement. The results of the ATA agreement will set the expectation for the remaining unions' agreements. Any wage increase for locally bargained agreements is the responsibility of the CBE to cover within its existing funding from the Provincial Government.
- Parents and students may make different program decisions from what is anticipated due to the implications of Bill 1. If student enrolment shifts significantly between schools and programs, this would pose challenges for staffing, transportation and school scheduling come the fall.
- The largest risk in this budget is the use of reserves to balance the 2017-18 budget. The use of reserves to cover regular, on-going operations is a one-year, temporary solution. Going forward, the CBE will continue to struggle with maintaining service levels, managing increasing costs and accommodating system growth with flat funding rates (see funding per student graph on page 7). The CBE will engage with our public and our staff to understand how this can be done with as little impact to students as possible.

## Conclusion

These assumptions will allow us to build a budget that is balanced and stays true to our values. Spending reductions are an unfortunate reality of this budget. We have approached these in a way that balances the reductions across the organization to minimize the impact on student learning. These budget assumptions support learning for 121,200 students next year, within our funding constraints and with consideration of the unknown elements of Bill 1.

Maximizing the dollars directed to the classroom to support student results remains our top priority. Our choices will continue to be guided and informed by our values: students come first, learning is our central purpose, and public education serves the common good.

The CBE, working with students, parents, stakeholders, and Alberta Education, will continue to provide the best public education programs and supports possible within the financial resources made available to us.

## Appendix I - Glossary of terms

|                               |  |
|-------------------------------|--|
| Alberta Education revenue     | All funds received from Alberta Education, including amortization of Alberta Education-funded facilities. This is sometimes referred to as provincial funding.   |
| Amortization                  | Amortization expenses for both supported and unsupported capital assets (“unsupported” capital assets are non-facility, “supported” capital assets are funded by externally restricted capital funding/contributions).   |
| Capital assets                | These are goods that are acquired that have a useful life that extends beyond one year and are of more than minor value. For example, computers, most musical instruments, furniture, machinery, etc.  |
| Credit Enrolment Units (CEUs) | Credit Enrolment Units are the funding unit used to calculate base instructional funding at the high school level. CEUs are assigned when the course, the student, and the student’s achievement in a course meet certain criteria.  |
| Collective agreement          | An agreement between a union or association that sets out terms and conditions of employment including general wage increases, benefits, grid movement, and other employment terms.  |
| Deferred maintenance          | The practice of postponing repair and maintenance activities to property (such as school buildings) in order to save costs and/or meet budget funding levels.  |
| Enrolment                     | Total number of students including those enrolled in Home Education, outreach programs and Chinook Learning Services.  |
| Fixed cost                    | A cost that will not change based on fluctuations in activity.   |
| General wage increase         | An overall wage increase or lump sum applicable to an entire union (or exempt) group.  |
| Grid movement                 | The increase in the salary paid to an employee based on movement through progressive salary grid levels. The movement is based on the passage of time.   |
| Operational Expectations      | Policies established by the Board of Trustees by which the Chief Superintendent’s performance and successful operation of the organization is evaluated  |
| PASI                          | The Provincial Approach to Student Information (PASI) is a strategic, multi-year initiative aimed at ensuring the business processes and technology related to student information are effectively positioned to serve the needs of Alberta’s K-12 students now and in the future.                             |
| Reserves                      | Dollars that have been accumulated from prior years that are available to support current year projects, programs and services. Reserves can be restricted by board motion or external parties.  |
| System administration         | The overall management, administration and educational leadership of the CBE at the system level. Also includes Board of Trustees remuneration and office budgets. Examples include functions in human resources, finance, information technology, legal and communications that provide system-level support. |
| Total revenue                 | All funds received from Alberta Education plus all other revenues.   |

## Appendix II – New schools opening in 2017-18 and 2018-19

The following new schools and major modernizations are opening in the next two years.

| #  | School  | New / modernization                  |
|----|---|--------------------------------------|
| 1  | Marshall Springs School                             | New, opening 2017-18                 |
| 2  | Manmeet Singh Bhullar School                        | New, opening 2017-18                 |
| 3  | Ron Southern School                                 | New, opening 2017-18                 |
| 4  | Griffith Woods School                               | New, opening 2017-18                 |
| 5  | Southeast High School                               | New, opening 2018-19                 |
| 6  | James Fowler High School                            | Modernization, completion in 2018-19 |
| 7  | Lord Beaverbrook High School                        | Modernization, completion in 2018-19 |
| 8  | Cranston Elementary School (announced spring 2017)  | New                                  |
| 9  | Evergreen Elementary School (announced spring 2017) | New                                  |
| 10 | Coventry Hills Elementary (announced spring 2017)   | New                                  |
| 11 | Forest Lawn High School (announced spring 2017)     | Modernization                        |

**CALGARY BOARD OF EDUCATION**  
**September 2017 Enrolment Projections**

| SCHOOL                  | Program / Location   | Total | Pre-K | K   | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|-------------------------|----------------------|-------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| A E CROSS               |                      | 458   |       |     |     |     |     |     |     |     | 149 | 132 | 177 |      |      |      |
| A E CROSS               | Spanish Bilingual    | 39    |       |     |     |     |     |     |     |     | 39  |     |     |      |      |      |
| ABBEYDALE               |                      | 321   |       | 52  | 66  | 53  | 50  | 55  | 45  |     |     |     |     |      |      |      |
| ACADIA                  |                      | 285   |       | 48  | 54  | 46  | 47  | 51  | 39  |     |     |     |     |      |      |      |
| ALEX MUNRO              |                      | 279   |       | 43  | 40  | 37  | 37  | 42  | 44  | 36  |     |     |     |      |      |      |
| ALEXANDER FERGUSON      |                      | 256   |       | 27  | 39  | 42  | 46  | 44  | 30  | 28  |     |     |     |      |      |      |
| ALL BOYS                | Sir James Lougheed   | 191   |       | 17  | 21  | 24  | 31  | 29  | 45  | 24  |     |     |     |      |      |      |
| ALTADORE                |                      | 372   |       | 43  | 63  | 65  | 56  | 52  | 45  | 48  |     |     |     |      |      |      |
| ALTERNATIVE HIGH        |                      | 126   |       |     |     |     |     |     |     |     |     | -   | 5   | 21   | 29   | 71   |
| ANDREW SIBBALD          |                      | 164   |       | 22  | 23  | 30  | 41  | 31  | 17  |     |     |     |     |      |      |      |
| ANNIE FOOTE             |                      | 485   |       | 82  | 78  | 79  | 90  | 55  | 53  | 48  |     |     |     |      |      |      |
| ANNIE GALE              |                      | 327   |       |     |     |     |     |     |     |     | 94  | 104 | 129 |      |      |      |
| ANNIE GALE              | Traditional Learning | 228   |       |     |     |     |     |     |     | 50  | 58  | 62  | 58  |      |      |      |
| ARBOUR LAKE             |                      | 823   |       |     |     |     |     |     | 139 | 141 | 159 | 183 | 201 |      |      |      |
| AUBURN BAY              |                      | 611   |       | 157 | 144 | 131 | 101 | 78  |     |     |     |     |     |      |      |      |
| BALMORAL                | Traditional Learning | 615   |       |     |     |     |     |     | 102 | 125 | 130 | 150 | 108 |      |      |      |
| BANFF TRAIL             | French Immersion     | 406   |       | 52  | 48  | 67  | 65  | 58  | 55  | 61  |     |     |     |      |      |      |
| BANTING AND BEST        |                      | 222   |       | 59  | 57  | 56  | 50  |     |     |     |     |     |     |      |      |      |
| BATTALION PARK          |                      | 415   |       | 47  | 57  | 76  | 63  | 60  | 48  | 64  |     |     |     |      |      |      |
| BEDDINGTON HEIGHTS      |                      | 458   |       | 57  | 54  | 81  | 76  | 65  | 59  | 66  |     |     |     |      |      |      |
| BELFAST                 |                      | 260   |       | 35  | 43  | 35  | 41  | 36  | 34  | 36  |     |     |     |      |      |      |
| BELVEDERE PARKWAY       |                      | 290   |       | 30  | 41  | 42  | 50  | 45  | 35  | 47  |     |     |     |      |      |      |
| BISHOP PINKHAM          |                      | 106   |       |     |     |     |     |     |     |     | 27  | 19  | 60  |      |      |      |
| BISHOP PINKHAM          | French Immersion     | 396   |       |     |     |     |     |     |     | 51  | 112 | 107 | 126 |      |      |      |
| BISHOP PINKHAM          | Spanish Bilingual    | 72    |       |     |     |     |     |     |     |     |     | 33  | 39  |      |      |      |
| BOB EDWARDS             |                      | 195   |       |     |     |     |     |     |     | 50  | 54  | 46  | 45  |      |      |      |
| BOB EDWARDS             | French Immersion     | 135   |       |     |     |     |     |     |     | 21  | 39  | 36  | 39  |      |      |      |
| BOWCROFT                |                      | 133   |       | 26  | 25  | 23  | 13  | 16  | 12  | 18  |     |     |     |      |      |      |
| BOWCROFT                | German Bilingual     | 135   |       | 24  | 23  | 25  | 23  | 20  | 13  | 7   |     |     |     |      |      |      |
| BOWNESS                 |                      | 679   |       |     |     |     |     |     |     |     |     |     |     | 221  | 233  | 225  |
| BRAESIDE                |                      | 240   |       | 27  | 33  | 40  | 37  | 36  | 36  | 31  |     |     |     |      |      |      |
| BRANTON                 | French Immersion     | 699   |       |     |     |     |     |     |     |     | 226 | 243 | 230 |      |      |      |
| BRENTWOOD               | System Classes       | 6     |       |     | 2   | 2   |     |     | 2   |     |     |     |     |      |      |      |
| BRENTWOOD               | Traditional Learning | 653   |       | 100 | 94  | 110 | 125 | 110 | 114 |     |     |     |     |      |      |      |
| BRIAR HILL              |                      | 237   |       | 37  | 39  | 34  | 35  | 25  | 35  | 32  |     |     |     |      |      |      |
| BRIDLEWOOD              |                      | 559   |       | 65  | 83  | 87  | 89  | 77  | 78  | 80  |     |     |     |      |      |      |
| BUCHANAN                |                      | 200   |       | 34  | 34  | 30  | 18  | 27  | 33  | 24  |     |     |     |      |      |      |
| BUFFALO RUBBING STONE   |                      | 516   |       | 135 | 91  | 96  | 92  | 102 |     |     |     |     |     |      |      |      |
| CAMBRIAN HEIGHTS        |                      | 163   |       | 21  | 20  | 17  | 30  | 25  | 32  | 18  |     |     |     |      |      |      |
| CANYON MEADOWS          | Spanish Bilingual    | 461   |       | 75  | 74  | 75  | 68  | 69  | 100 |     |     |     |     |      |      |      |
| CAPITOL HILL            |                      | 350   |       | 54  | 46  | 48  | 48  | 61  | 43  | 50  |     |     |     |      |      |      |
| CAPPY SMART             |                      | 202   |       | 24  | 25  | 34  | 35  | 42  | 42  |     |     |     |     |      |      |      |
| CAPTAIN JOHN PALLISER   |                      | 242   |       | 11  | 18  | 23  | 24  | 23  | 71  | 72  |     |     |     |      |      |      |
| CAPTAIN JOHN PALLISER   | Montessori           | 300   |       | 55  | 38  | 56  | 54  | 41  | 38  | 18  |     |     |     |      |      |      |
| CAPTAIN NICHOLA GODDARD |                      | 904   |       |     |     |     |     |     | 212 | 212 | 156 | 161 | 163 |      |      |      |
| CATHERINE N GUNN        |                      | 324   |       | 32  | 50  | 53  | 48  | 48  | 48  | 45  |     |     |     |      |      |      |
| CECIL SWANSON           |                      | 435   |       | 75  | 71  | 65  | 72  | 56  | 42  | 54  |     |     |     |      |      |      |
| CEDARBRAE               |                      | 233   |       | 28  | 35  | 35  | 38  | 41  | 24  | 32  |     |     |     |      |      |      |

| SCHOOL                | Program / Location     | Total | Pre-K | K   | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|-----------------------|------------------------|-------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| CENTENNIAL            |                        | 1,750 |       |     |     |     |     |     |     |     |     |     |     | 530  | 649  | 571  |
| CENTRAL MEMORIAL      |                        | 1,021 |       |     |     |     |     |     |     |     |     |     |     | 338  | 313  | 370  |
| CHAPARRAL             |                        | 537   |       | 75  | 75  | 77  | 75  | 92  | 77  | 66  |     |     |     |      |      |      |
| CHIEF JUSTICE MILVAIN |                        | 204   |       | 16  | 30  | 34  | 41  | 36  | 25  | 22  |     |     |     |      |      |      |
| CHIEF JUSTICE MILVAIN | Traditional Learning   | 301   |       | 50  | 50  | 50  | 50  | 51  | 50  |     |     |     |     |      |      |      |
| CHINOOK PARK          |                        | 186   |       | 17  | 21  | 32  | 27  | 35  | 26  | 28  |     |     |     |      |      |      |
| CHINOOK PARK          | French Immersion       | 305   |       | 44  | 42  | 51  | 45  | 48  | 47  | 28  |     |     |     |      |      |      |
| CHRIS AKKERMAN        | Traditional Learning   | 615   |       | 100 | 103 | 107 | 101 | 100 | 104 |     |     |     |     |      |      |      |
| CITADEL PARK          |                        | 446   |       | 59  | 105 | 106 | 89  | 87  |     |     |     |     |     |      |      |      |
| CLARENCE SANSOM       |                        | 478   |       |     |     |     |     |     |     |     | 173 | 154 | 151 |      |      |      |
| COLLINGWOOD           | Spanish Bilingual      | 518   |       | 85  | 88  | 97  | 77  | 94  | 77  |     |     |     |     |      |      |      |
| COLONEL IRVINE        |                        | 140   |       |     |     |     |     |     |     |     | 61  | 54  | 25  |      |      |      |
| COLONEL IRVINE        | Chinese (Mandarin) Bil | 251   |       |     |     |     |     |     | 64  | 67  | 39  | 45  | 36  |      |      |      |
| COLONEL J F SCOTT     |                        | 467   |       | 48  | 59  | 72  | 80  | 69  | 75  | 64  |     |     |     |      |      |      |
| COLONEL MACLEOD       |                        | 68    |       |     |     |     |     |     |     |     | 23  | 16  | 29  |      |      |      |
| COLONEL MACLEOD       | Traditional Learning   | 423   |       |     |     |     |     |     | 87  | 94  | 84  | 80  | 78  |      |      |      |
| COLONEL SANDERS       | Traditional Learning   | 398   |       |     | 100 | 98  | 101 | 99  |     |     |     |     |     |      |      |      |
| COLONEL WALKER        |                        | 128   |       | 20  | 29  | 22  | 17  | 11  | 15  | 14  |     |     |     |      |      |      |
| CONNAUGHT             |                        | 325   |       | 77  | 76  | 53  | 37  | 33  | 23  | 26  |     |     |     |      |      |      |
| COPPERFIELD           |                        | 482   |       | 124 | 106 | 88  | 101 | 63  |     |     |     |     |     |      |      |      |
| COVENTRY HILLS        |                        | 613   | 20    | 162 | 155 | 137 | 139 |     |     |     |     |     |     |      |      |      |
| CRANSTON              |                        | 572   |       | 139 | 144 | 142 | 147 |     |     |     |     |     |     |      |      |      |
| CRESCENT HEIGHTS      |                        | 1,421 |       |     |     |     |     |     |     |     |     |     |     | 437  | 436  | 548  |
| CROSSING PARK         |                        | 1,080 |       | 93  | 88  | 83  | 92  | 85  | 90  | 145 | 156 | 142 | 106 |      |      |      |
| DALHOUSIE             | Spanish Bilingual      | 482   |       | 75  | 72  | 74  | 69  | 82  | 110 |     |     |     |     |      |      |      |
| DAVID THOMPSON        |                        | 187   |       |     |     |     |     |     |     | 45  | 52  | 32  | 58  |      |      |      |
| DAVID THOMPSON        | French Immersion       | 449   |       |     |     |     |     |     | 85  | 82  | 103 | 93  | 86  |      |      |      |
| DEER RUN              |                        | 354   |       | 50  | 52  | 52  | 49  | 57  | 52  | 42  |     |     |     |      |      |      |
| DOUGLAS HARKNESS      |                        | 285   | 20    | 30  | 35  | 37  | 36  | 40  | 46  | 41  |     |     |     |      |      |      |
| DOUGLASDALE           |                        | 325   |       | 57  | 60  | 72  | 81  | 55  |     |     |     |     |     |      |      |      |
| DR E P SCARLETT       |                        | 1,309 |       |     |     |     |     |     |     |     |     |     |     | 418  | 446  | 445  |
| DR E P SCARLETT       | French Immersion       | 269   |       |     |     |     |     |     |     |     |     |     |     | 111  | 89   | 69   |
| DR E P SCARLETT       | Spanish Bilingual      | 117   |       |     |     |     |     |     |     |     |     |     |     | 46   | 37   | 34   |
| DR E W COFFIN         |                        | 175   |       | 18  | 25  | 29  | 27  | 24  | 30  | 22  |     |     |     |      |      |      |
| DR GEORGE STANLEY     |                        | 627   |       |     |     |     |     | 155 | 130 | 127 | 95  | 81  | 39  |      |      |      |
| DR GLADYS M EGBERT    |                        | 415   |       |     |     |     |     |     |     | 102 | 116 | 96  | 101 |      |      |      |
| DR GORDON HIGGINS     |                        | 485   |       |     |     |     |     |     |     |     | 166 | 164 | 155 |      |      |      |
| DR J K MULLOY         | Traditional Learning   | 477   |       | 107 | 92  | 98  | 91  | 89  |     |     |     |     |     |      |      |      |
| DR MARTHA COHEN       |                        | 585   |       |     |     |     |     |     | 166 | 122 | 110 | 108 | 79  |      |      |      |
| DR ROBERTA BONDAR     |                        | 411   |       | 90  | 67  | 71  | 70  | 65  | 48  |     |     |     |     |      |      |      |
| EARL GREY             |                        | 203   |       | 18  | 26  | 30  | 35  | 36  | 27  | 31  |     |     |     |      |      |      |
| EDGEMONT              |                        | 710   |       | 124 | 141 | 103 | 105 | 104 | 133 |     |     |     |     |      |      |      |
| ELBOW PARK            |                        | 181   |       | 25  | 20  | 27  | 40  | 18  | 37  | 14  |     |     |     |      |      |      |
| ELBOYA                |                        | 407   |       | 30  | 49  | 41  | 47  | 51  | 40  | 49  | 25  | 27  | 48  |      |      |      |
| ELBOYA                | French Immersion       | 263   |       |     |     |     |     |     | 46  | 45  | 60  | 75  | 37  |      |      |      |
| ERIC HARVIE           |                        | 444   |       | 88  | 95  | 92  | 79  | 90  |     |     |     |     |     |      |      |      |
| ERIN WOODS            |                        | 375   |       | 60  | 69  | 70  | 69  | 54  | 53  |     |     |     |     |      |      |      |
| ERNEST MANNING        |                        | 1,781 |       |     |     |     |     |     |     |     |     |     |     | 566  | 614  | 601  |
| ERNEST MORROW         |                        | 647   |       |     |     |     |     |     |     | 139 | 143 | 197 | 168 |      |      |      |
| ETHEL M JOHNSON       |                        | 315   |       | 31  | 40  | 36  | 44  | 57  | 53  | 54  |     |     |     |      |      |      |

| SCHOOL               | Program / Location     | Total | Pre-K | K   | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|----------------------|------------------------|-------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| EUGENE COSTE         | Spanish Bilingual      | 308   |       | 62  | 62  | 89  | 54  | 41  |     |     |     |     |     |      |      |      |
| EVERGREEN            |                        | 478   |       | 88  | 114 | 145 | 131 |     |     |     |     |     |     |      |      |      |
| F E OSBORNE          |                        | 457   |       |     |     |     |     |     |     |     | 134 | 157 | 166 |      |      |      |
| FAIRVIEW             | Traditional Learning   | 631   |       |     |     |     |     | 110 | 103 | 115 | 101 | 99  | 103 |      |      |      |
| FALCONRIDGE          |                        | 459   | 20    | 83  | 73  | 64  | 62  | 66  | 53  | 38  |     |     |     |      |      |      |
| FISH CREEK           |                        | 638   |       | 83  | 80  | 90  | 91  | 111 | 101 | 82  |     |     |     |      |      |      |
| FOREST LAWN          |                        | 1,327 |       |     |     |     |     |     |     |     |     |     |     | 473  | 384  | 470  |
| G W SKENE            |                        | 180   |       |     |     |     | 54  | 55  | 71  |     |     |     |     |      |      |      |
| GEORGES P VANIER     |                        | 180   |       |     |     |     |     |     |     |     | 48  | 42  | 90  |      |      |      |
| GEORGES P VANIER     | French Immersion       | 220   |       |     |     |     |     |     |     |     | 84  | 71  | 65  |      |      |      |
| GLAMORGAN            | Traditional Learning   | 710   |       | 75  | 82  | 73  | 74  | 91  | 87  | 98  | 57  | 49  | 24  |      |      |      |
| GLENBROOK            |                        | 243   |       | 32  | 44  | 43  | 32  | 38  | 29  | 25  |     |     |     |      |      |      |
| GLENDALE             |                        | 248   |       | 29  | 39  | 44  | 33  | 33  | 38  | 32  |     |     |     |      |      |      |
| GRANT MACEWAN        |                        | 325   |       | 48  | 64  | 51  | 47  | 44  | 37  | 34  |     |     |     |      |      |      |
| GRIFFITH WOODS       |                        | 627   |       | 66  | 84  | 59  | 94  | 81  | 64  | 65  | 72  | 42  |     |      |      |      |
| GUY WEADICK          |                        | 467   |       | 101 | 92  | 73  | 69  | 59  | 37  | 36  |     |     |     |      |      |      |
| H D CARTWRIGHT       |                        | 381   |       |     |     |     |     |     |     |     | 127 | 111 | 143 |      |      |      |
| HAMPTONS (THE)       |                        | 186   |       | 23  | 36  | 40  | 58  | 29  |     |     |     |     |     |      |      |      |
| HAROLD PANABAKER     |                        | 231   |       |     |     |     |     |     |     |     | 94  | 59  | 78  |      |      |      |
| HAULTAIN MEMORIAL    |                        | 255   | 20    | 47  | 47  | 30  | 32  | 26  | 19  | 34  |     |     |     |      |      |      |
| HAWKWOOD             |                        | 625   |       | 71  | 96  | 102 | 104 | 86  | 91  | 75  |     |     |     |      |      |      |
| HAYSBORO             |                        | 161   |       | 20  | 22  | 26  | 28  | 24  | 21  | 20  |     |     |     |      |      |      |
| HENRY WISE WOOD      |                        | 1,212 |       |     |     |     |     |     |     |     |     |     |     | 375  | 391  | 446  |
| HIDDEN VALLEY        |                        | 230   |       | 53  | 55  | 55  | 67  |     |     |     |     |     |     |      |      |      |
| HIDDEN VALLEY        | French Immersion       | 232   |       | 54  | 56  | 61  | 61  |     |     |     |     |     |     |      |      |      |
| HIGHWOOD             | Chinese (Mandarin) Bil | 355   |       | 75  | 75  | 68  | 62  | 75  |     |     |     |     |     |      |      |      |
| HILLHURST            |                        | 309   |       | 28  | 26  | 22  | 22  | 60  | 69  | 82  |     |     |     |      |      |      |
| HUGH A. BENNETT      |                        | 446   |       | 80  | 83  | 101 | 92  | 90  |     |     |     |     |     |      |      |      |
| HUNTINGTON HILLS     |                        | 255   |       | 20  | 37  | 33  | 44  | 48  | 35  | 38  |     |     |     |      |      |      |
| IAN BAZALGETTE       |                        | 401   |       |     |     |     |     |     |     | 110 | 88  | 95  | 108 |      |      |      |
| IAN BAZALGETTE       | Science                | 100   |       |     |     |     |     |     |     | 50  | 50  |     |     |      |      |      |
| JACK JAMES           |                        | 389   |       |     |     |     |     |     |     |     |     |     |     | 107  | 105  | 177  |
| JAMES FOWLER         |                        | 458   |       |     |     |     |     |     |     |     |     |     |     | 127  | 136  | 195  |
| JAMES FOWLER         | Arts Centered Learning | 247   |       |     |     |     |     |     |     |     |     |     |     | 60   | 81   | 106  |
| JAMES SHORT MEMORIAL |                        | 292   | 40    | 71  | 81  | 100 |     |     |     |     |     |     |     |      |      |      |
| JANET JOHNSTONE      |                        | 302   |       | 61  | 53  | 66  | 55  | 67  |     |     |     |     |     |      |      |      |
| JANET JOHNSTONE      | French Immersion       | 233   |       | 50  | 51  | 53  | 42  | 37  |     |     |     |     |     |      |      |      |
| JENNIE ELLIOTT       |                        | 441   |       | 74  | 73  | 80  | 83  | 46  | 44  | 41  |     |     |     |      |      |      |
| JOHN G DIEFENBAKER   |                        | 1,343 |       |     |     |     |     |     |     |     |     |     |     | 400  | 432  | 511  |
| JOHN WARE            |                        | 398   |       |     |     |     |     |     |     |     | 150 | 128 | 120 |      |      |      |
| KEELER               |                        | 290   | 20    | 45  | 49  | 40  | 41  | 49  | 46  |     |     |     |     |      |      |      |
| KENNETH D. TAYLOR    |                        | 513   |       | 115 | 116 | 121 | 86  | 75  |     |     |     |     |     |      |      |      |
| KILLARNEY            | Montessori             | 381   |       | 70  | 70  | 63  | 62  | 51  | 37  | 28  |     |     |     |      |      |      |
| KING GEORGE          | French Immersion       | 600   |       | 116 | 105 | 85  | 82  | 69  | 67  | 76  |     |     |     |      |      |      |
| LAKE BONA VISTA      | Montessori             | 373   |       | 80  | 67  | 70  | 45  | 55  | 34  | 22  |     |     |     |      |      |      |
| LANGEVIN             | System Classes         | 12    |       |     |     |     |     |     |     |     | 3   | 5   | 4   |      |      |      |
| LANGEVIN             | Science                | 619   |       | 46  | 49  | 48  | 49  | 53  | 74  | 50  | 86  | 83  | 81  |      |      |      |
| LE ROI DANIELS       | Traditional Learning   | 528   |       | 120 | 132 | 132 | 144 |     |     |     |     |     |     |      |      |      |
| LESTER B PEARSON     |                        | 1,402 |       |     |     |     |     |     |     |     |     |     |     | 452  | 411  | 539  |
| LESTER B PEARSON     | French Immersion       | 89    |       |     |     |     |     |     |     |     |     |     |     | 28   | 31   | 30   |

| SCHOOL                  | Program / Location       | Total | Pre-K | K   | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|-------------------------|--------------------------|-------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| LORD BEAVERBROOK        |                          | 1,616 |       |     |     |     |     |     |     |     |     |     |     | 522  | 518  | 576  |
| LORD BEAVERBROOK        | Arts Centered Learning   | 70    |       |     |     |     |     |     |     |     |     |     |     | 33   | 24   | 13   |
| LOUIS RIEL              | Science                  | 511   |       | 74  | 62  | 45  | 46  | 60  | 52  | 42  | 44  | 42  | 44  |      |      |      |
| LOUIS RIEL              | GATE                     | 317   |       |     |     |     |     | 50  | 44  | 55  | 49  | 56  | 63  |      |      |      |
| LOUISE DEAN             |                          | 98    |       |     |     |     |     |     |     |     |     |     |     | 19   | 34   | 45   |
| MANMEET SINGH BHULLAR   |                          | 460   |       | 86  | 69  | 71  | 83  | 74  | 77  |     |     |     |     |      |      |      |
| MAPLE RIDGE             |                          | 140   |       | 32  | 24  | 32  | 24  | 28  |     |     |     |     |     |      |      |      |
| MAPLE RIDGE             | Science                  | 200   |       | 50  | 50  | 40  | 30  | 30  |     |     |     |     |     |      |      |      |
| MARION CARSON           |                          | 334   |       | 30  | 42  | 49  | 60  | 46  | 56  | 51  |     |     |     |      |      |      |
| MARION CARSON           | Chinese (Mandarin) Bil   | 223   |       | 50  | 45  | 52  | 46  | 30  | -   | -   |     |     |     |      |      |      |
| MARLBOROUGH             |                          | 217   |       | 40  | 41  | 39  | 37  | 36  | 24  |     |     |     |     |      |      |      |
| MARSHALL SPRINGS        |                          | 505   |       |     |     |     |     | 145 | 114 | 99  | 74  | 73  |     |      |      |      |
| MAYLAND HEIGHTS         |                          | 171   |       | 30  | 25  | 14  | 32  | 25  | 26  | 19  |     |     |     |      |      |      |
| MAYLAND HEIGHTS         | French Immersion         | 319   |       | 63  | 56  | 47  | 53  | 52  | 48  |     |     |     |     |      |      |      |
| MCKENZIE HIGHLANDS      |                          | 398   |       |     |     |     |     | 40  | 100 | 85  | 70  | 64  | 39  |      |      |      |
| MCKENZIE LAKE           |                          | 490   | 20    | 108 | 90  | 84  | 109 | 79  |     |     |     |     |     |      |      |      |
| MCKENZIE TOWNE          |                          | 627   |       | 129 | 140 | 126 | 157 | 75  |     |     |     |     |     |      |      |      |
| MIDNAPORE               |                          | 260   |       | 36  | 37  | 42  | 39  | 35  | 44  | 27  |     |     |     |      |      |      |
| MIDNAPORE               | Chinese (Mandarin) Bilin | 275   |       | 51  | 47  | 47  | 45  | 36  | 26  | 23  |     |     |     |      |      |      |
| MIDSUN                  |                          | 801   |       |     |     |     |     |     |     |     | 272 | 264 | 265 |      |      |      |
| MONTEREY PARK           |                          | 487   |       | 68  | 73  | 71  | 72  | 76  | 58  | 69  |     |     |     |      |      |      |
| MOUNT ROYAL             |                          | 246   |       |     |     |     |     |     |     |     | 80  | 84  | 82  |      |      |      |
| MOUNT VIEW              |                          | 214   |       | 24  | 37  | 38  | 30  | 30  | 34  | 21  |     |     |     |      |      |      |
| MOUNTAIN PARK           |                          | 794   |       |     |     |     |     |     | 158 | 141 | 168 | 161 | 166 |      |      |      |
| NATIONAL SPORT SCHOOL   |                          | 166   |       |     |     |     |     |     |     |     |     |     |     | 31   | 42   | 39   |
| NELLIE McCLUNG          |                          | 423   |       | 55  | 62  | 63  | 62  | 77  | 51  | 53  |     |     |     |      |      |      |
| NELSON MANDELA          |                          | 1,842 |       |     |     |     |     |     |     |     |     |     |     | 705  | 638  | 499  |
| NEW BRIGHTON            |                          | 631   |       | 165 | 164 | 118 | 96  | 88  |     |     |     |     |     |      |      |      |
| NICKLE                  |                          | 523   |       |     |     |     |     |     | 70  | 86  | 115 | 116 | 136 |      |      |      |
| NORTH HAVEN             |                          | 321   | 60    | 37  | 37  | 37  | 32  | 36  | 39  | 43  |     |     |     |      |      |      |
| NOSE CREEK              |                          | 901   |       |     |     |     |     | 152 | 145 | 143 | 154 | 154 | 153 |      |      |      |
| O S GEIGER              |                          | 431   | 20    | 71  | 49  | 56  | 59  | 69  | 53  | 54  |     |     |     |      |      |      |
| OLYMPIC HEIGHTS         |                          | 644   |       | 79  | 84  | 84  | 82  | 104 | 86  | 125 |     |     |     |      |      |      |
| PANORAMA HILLS          |                          | 490   |       | 82  | 88  | 92  | 105 | 123 |     |     |     |     |     |      |      |      |
| PATRICK AIRLIE          |                          | 240   |       | 59  | 41  | 37  | 38  | 39  | 26  |     |     |     |     |      |      |      |
| PENBROOKE MEADOWS       |                          | 170   |       | 26  | 24  | 28  | 20  | 37  | 35  |     |     |     |     |      |      |      |
| PETER LOUGHEED          |                          | 637   |       |     |     |     |     |     | 152 | 149 | 113 | 135 | 88  |      |      |      |
| PIITOAYIS FAMILY SCHOOL | Colonel Walker           | 181   |       | 25  | 28  | 27  | 27  | 26  | 22  | 26  |     |     |     |      |      |      |
| PINERIDGE               |                          | 257   |       | 31  | 34  | 33  | 38  | 50  | 29  | 42  |     |     |     |      |      |      |
| PRINCE OF WALES         |                          | 424   |       | 53  | 70  | 64  | 83  | 52  | 50  | 52  |     |     |     |      |      |      |
| QUEEN ELIZABETH         |                          | 342   |       | 37  | 68  | 51  | 59  | 43  | 39  | 45  |     |     |     |      |      |      |
| QUEEN ELIZABETH JR/SR   |                          | 962   |       |     |     |     |     |     |     |     | 170 | 201 | 163 | 140  | 155  | 133  |
| R T ALDERMAN            |                          | 146   |       |     |     |     |     |     | 22  | 14  | 26  | 27  | 57  |      |      |      |
| R T ALDERMAN            | Science                  | 95    |       |     |     |     |     |     | 25  | 30  | 20  | 20  |     |      |      |      |
| RADISSON PARK           |                          | 248   |       | 33  | 50  | 50  | 38  | 36  | 41  |     |     |     |     |      |      |      |
| RAMSAY                  |                          | 122   |       | 25  | 23  | 21  | 14  | 17  | 14  | 8   |     |     |     |      |      |      |
| RANCHLANDS              |                          | 542   |       | 103 | 88  | 62  | 67  | 82  | 59  | 81  |     |     |     |      |      |      |
| RICHMOND                |                          | 197   |       | 40  | 40  | 29  | 22  | 28  | 20  | 18  |     |     |     |      |      |      |
| RIDEAU PARK             |                          | 419   |       | 21  | 28  | 30  | 21  | 22  | 33  | 19  | 97  | 62  | 86  |      |      |      |
| RIVERBEND               |                          | 445   |       | 65  | 73  | 68  | 72  | 69  | 56  | 42  |     |     |     |      |      |      |

| SCHOOL                | Program / Location     | Total | Pre-K | K   | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|-----------------------|------------------------|-------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| ROBERT THIRSK         |                        | 1,214 |       |     |     |     |     |     |     |     |     |     |     | 429  | 347  | 438  |
| ROBERT WARREN         | Spanish Bilingual      | 275   |       |     |     |     |     |     |     | 86  | 74  | 55  | 60  |      |      |      |
| ROLAND MICHENER       |                        | 201   |       | 28  | 25  | 45  | 33  | 39  | 31  |     |     |     |     |      |      |      |
| RON SOUTHERN          |                        | 200   |       | 51  | 56  | 28  | 30  | 19  | 16  |     |     |     |     |      |      |      |
| ROSEDALE              |                        | 242   |       | 22  | 21  | 25  | 22  | 22  | 25  | 30  | 28  | 21  | 26  |      |      |      |
| ROSEMONT              |                        | 249   |       | 34  | 42  | 31  | 38  | 41  | 32  | 31  |     |     |     |      |      |      |
| ROSSCARROCK           |                        | 205   |       | 28  | 36  | 24  | 40  | 31  | 19  | 27  |     |     |     |      |      |      |
| ROSSCARROCK           | Spanish Bilingual      | 158   |       | 48  | 50  | 60  |     |     |     |     |     |     |     |      |      |      |
| ROYAL OAK             |                        | 498   |       | 113 | 139 | 115 | 131 |     |     |     |     |     |     |      |      |      |
| RUNDLE                |                        | 502   |       | 65  | 83  | 66  | 64  | 84  | 72  | 68  |     |     |     |      |      |      |
| SADDLE RIDGE          |                        | 587   |       | 114 | 113 | 132 | 114 | 114 |     |     |     |     |     |      |      |      |
| SAM LIVINGSTON        | French Immersion       | 490   |       | 105 | 97  | 97  | 96  | 95  |     |     |     |     |     |      |      |      |
| SAMUEL W SHAW         |                        | 831   |       |     |     |     |     |     | 108 | 132 | 219 | 183 | 189 |      |      |      |
| SCENIC ACRES          |                        | 142   |       | 27  | 22  | 28  | 25  | 40  |     |     |     |     |     |      |      |      |
| SENATOR PATRICK BURNS |                        | 87    |       |     |     |     |     |     |     |     | 31  | 30  | 26  |      |      |      |
| SENATOR PATRICK BURNS | Spanish Bilingual      | 564   |       |     |     |     |     |     |     | 160 | 159 | 131 | 114 |      |      |      |
| SHERWOOD              |                        | 412   |       |     |     |     |     | 46  | 54  | 46  | 82  | 90  | 94  |      |      |      |
| SILVER SPRINGS        |                        | 256   |       | 43  | 40  | 38  | 44  | 38  | 22  | 31  |     |     |     |      |      |      |
| SIMON FRASER          |                        | 377   |       |     |     |     |     |     | 47  | 47  | 81  | 105 | 97  |      |      |      |
| SIMONS VALLEY         |                        | 685   |       | 68  | 89  | 99  | 109 | 97  | 121 | 102 |     |     |     |      |      |      |
| SIR JOHN A MACDONALD  |                        | 589   |       |     |     |     |     |     |     |     | 222 | 182 | 185 |      |      |      |
| SIR JOHN FRANKLIN     | Arts Centered Learning | 388   |       |     |     |     |     |     | 30  | 50  | 107 | 103 | 98  |      |      |      |
| SIR JOHN FRANKLIN     | System Classes         | 69    |       |     |     |     |     |     | 20  | 23  | 8   | 9   | 9   |      |      |      |
| SIR WILFRID LAURIER   | Traditional Learning   | 468   |       |     |     |     |     |     |     | 117 | 120 | 130 | 101 |      |      |      |
| SIR WINSTON CHURCHILL |                        | 2,245 |       |     |     |     |     |     |     |     |     |     |     | 667  | 708  | 870  |
| SOMERSET              |                        | 266   |       | 47  | 51  | 51  | 59  | 58  |     |     |     |     |     |      |      |      |
| STANLEY JONES         |                        | 248   |       | 30  | 44  | 48  | 46  | 36  | 21  | 23  |     |     |     |      |      |      |
| STANLEY JONES         | Alice Jamieson         | 292   |       |     |     |     |     | 28  | 41  | 53  | 63  | 48  | 59  |      |      |      |
| SUNALTA               |                        | 295   |       | 27  | 39  | 44  | 48  | 49  | 45  | 43  |     |     |     |      |      |      |
| SUNDANCE              |                        | 63    |       |     |     |     | 12  | 8   | 21  | 22  |     |     |     |      |      |      |
| SUNDANCE              | French Immersion       | 413   |       | 68  | 67  | 93  | 70  | 63  | 32  | 20  |     |     |     |      |      |      |
| SUNNYSIDE             |                        | 145   |       | 18  | 23  | 22  | 22  | 22  | 19  | 19  |     |     |     |      |      |      |
| TARADALE              |                        | 663   |       | 140 | 128 | 125 | 134 | 136 |     |     |     |     |     |      |      |      |
| TED HARRISON          |                        | 706   |       |     |     |     |     |     | 134 | 134 | 155 | 151 | 132 |      |      |      |
| TERRACE ROAD          |                        | 187   | 26    | 28  | 20  | 30  | 23  | 17  | 20  | 23  |     |     |     |      |      |      |
| TERRY FOX             |                        | 369   |       |     |     |     |     |     |     |     | 127 | 110 | 132 |      |      |      |
| THOMAS B RILEY        |                        | 154   |       |     |     |     |     |     |     |     | 43  | 42  | 69  |      |      |      |
| THOMAS B RILEY        | Traditional Learning   | 358   |       |     |     |     |     |     |     | 93  | 112 | 77  | 76  |      |      |      |
| THORNCLIFFE           |                        | 160   |       | 24  | 23  | 19  | 19  | 22  | 30  | 23  |     |     |     |      |      |      |
| THORNCLIFFE           | Traditional Learning   | 80    |       | 80  |     |     |     |     |     |     |     |     |     |      |      |      |
| TOM BAINES            |                        | 744   |       |     |     |     |     |     |     | 130 | 184 | 204 | 226 |      |      |      |
| TUSCANY               |                        | 398   |       | 67  | 68  | 82  | 87  | 94  |     |     |     |     |     |      |      |      |
| TWELVE MILE COULEE    |                        | 822   |       |     |     |     |     |     | 169 | 170 | 175 | 147 | 161 |      |      |      |
| UNIVERSITY            |                        | 428   |       | 77  | 76  | 65  | 65  | 52  | 53  | 40  |     |     |     |      |      |      |
| VALLEY CREEK          |                        | 482   |       |     |     |     |     | 64  | 72  | 73  | 75  | 91  | 107 |      |      |      |
| VALLEY CREEK          | French Immersion       | 221   |       |     |     |     |     | 52  | 47  | 35  | 35  | 29  | 23  |      |      |      |
| VALLEY VIEW           |                        | 223   |       | 32  | 39  | 42  | 38  | 33  | 39  |     |     |     |     |      |      |      |
| VALLEY VIEW           | Medicine Wheel         | 15    |       | 15  |     |     |     |     |     |     |     |     |     |      |      |      |
| VALLEY VIEW           | Science                | 300   |       | 50  | 50  | 50  | 50  | 50  | 50  |     |     |     |     |      |      |      |
| VARSITY ACRES         | French Immersion       | 542   |       | 67  | 76  | 72  | 88  | 78  | 83  | 78  |     |     |     |      |      |      |

| SCHOOL                                    | Program / Location     | Total          | Pre-K      | K            | GR1          | GR2          | GR3          | GR4          | GR5          | GR6          | GR7          | GR8          | GR9          | GR10         | GR11         | GR12         |
|---|------------------------|----------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| VINCENT MASSEY                            |                        | 647            |            |              |              |              |              |              |              |              | 204          | 217          | 226          |              |              |              |
| VISTA HEIGHTS                             |                        | 140            |            | 29           | 23           | 21           | 22           | 15           | 15           | 15           |              |              |              |              |              |              |
| W O MITCHELL                              |                        | 68             |            |              |              |              |              | 19           | 30           | 19           |              |              |              |              |              |              |
| W O MITCHELL                              | Spanish Bilingual      | 378            |            | 50           | 70           | 80           | 96           | 82           |              |              |              |              |              |              |              |              |
| WEST DALHOUSIE                            |                        | 304            |            | 31           | 33           | 32           | 49           | 62           | 42           | 55           |              |              |              |              |              |              |
| WEST DOVER                                |                        | 281            |            | 47           | 49           | 60           | 50           | 47           | 28           |              |              |              |              |              |              |              |
| WEST RIDGE                                |                        | 435            |            |              |              |              |              |              | 130          | 103          | 98           | 59           | 45           |              |              |              |
| WEST SPRINGS                              |                        | 482            |            | 73           | 74           | 103          | 113          | 119          |              |              |              |              |              |              |              |              |
| WESTERN CANADA                            |                        | 1,578          |            |              |              |              |              |              |              |              |              |              |              | 505          | 546          | 527          |
| WESTERN CANADA                            | French Immersion       | 497            |            |              |              |              |              |              |              |              |              |              |              | 168          | 181          | 148          |
| WESTGATE                                  | French Immersion       | 476            |            | 89           | 83           | 80           | 84           | 76           | 64           |              |              |              |              |              |              |              |
| WESTGATE                                  | Spanish Bilingual      | 222            |            |              |              |              | 66           | 52           | 54           | 50           |              |              |              |              |              |              |
| WILDWOOD                                  |                        | 446            |            | 71           | 66           | 49           | 67           | 75           | 61           | 57           |              |              |              |              |              |              |
| WILLIAM ABERHART                          |                        | 421            |            |              |              |              |              |              |              |              |              |              |              | 123          | 116          | 182          |
| WILLIAM ABERHART                          | French Immersion       | 790            |            |              |              |              |              |              |              |              |              |              |              | 275          | 271          | 244          |
| WILLIAM ABERHART                          |                        | 220            |            |              |              |              |              |              |              |              |              |              |              | 91           | 73           | 56           |
| WILLIAM D. PRATT                          |                        | 787            |            |              |              |              |              | 146          | 132          | 145          | 155          | 113          | 96           |              |              |              |
| WILLIAM REID                              | French Immersion       | 306            |            | 57           | 55           | 63           | 55           | 76           |              |              |              |              |              |              |              |              |
| WILLOW PARK                               | Arts Centered Learning | 654            |            |              |              |              |              |              | 90           | 115          | 150          | 152          | 147          |              |              |              |
| WILMA HANSEN                              |                        | 324            |            |              |              |              |              |              | 21           | 13           | 96           | 96           | 98           |              |              |              |
| WOODBINE                                  |                        | 374            | 17         | 40           | 60           | 60           | 49           | 57           | 44           | 47           |              |              |              |              |              |              |
| WOODLANDS                                 |                        | 281            |            | 34           | 39           | 45           | 54           | 40           | 42           | 27           |              |              |              |              |              |              |
| WOODMAN                                   |                        | 287            |            |              |              |              |              |              |              |              | 59           | 61           | 167          |              |              |              |
| WOODMAN                                   | French Immersion       | 295            |            |              |              |              |              |              | 28           | 25           | 87           | 86           | 69           |              |              |              |
| SYSTEM PROVISION - for allocation in Fall |                        | 542            |            |              |              |              |              |              |              |              |              |              |              |              |              |              |
| <b>TOTAL</b>                              |                        | <b>116,315</b> | <b>283</b> | <b>9,407</b> | <b>9,814</b> | <b>9,796</b> | <b>9,764</b> | <b>9,560</b> | <b>8,920</b> | <b>8,471</b> | <b>8,144</b> | <b>7,762</b> | <b>7,763</b> | <b>8,429</b> | <b>8,467</b> | <b>9,193</b> |

| SCHOOL | Program / Location | Total | Pre-K | K | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |
|--------|--------------------|-------|-------|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|
| SCHOOL |                    | Total | Pre-K | K | GR1 | GR2 | GR3 | GR4 | GR5 | GR6 | GR7 | GR8 | GR9 | GR10 | GR11 | GR12 |

**OUTREACH PROGRAMS**

|                                |             |              |   |   |   |   |   |   |   |   |   |   |   |           |            |              |
|--------------------------------|-------------|--------------|---|---|---|---|---|---|---|---|---|---|---|-----------|------------|--------------|
| DISCOVERING CHOICES            | Downtown    | 512          |   |   |   |   |   |   |   |   |   |   |   | 6         | 44         | 462          |
| DISCOVERING CHOICES II         | Marlborough | 358          |   |   |   |   |   |   |   |   |   |   |   | 6         | 29         | 323          |
| START OUTREACH - BOWNESS       | Bowness     | 156          |   |   |   |   |   |   |   |   |   |   |   | 5         | 15         | 136          |
| WESTBROOK OUTREACH             | Westbrook   | 217          |   |   |   |   |   |   |   |   |   |   |   | 5         | 25         | 187          |
| <b>TOTAL OUTREACH PROGRAMS</b> |             | <b>1,243</b> | - | - | - | - | - | - | - | - | - | - | - | <b>22</b> | <b>113</b> | <b>1,108</b> |

**UNIQUE SETTINGS**

|                               |        |            |           |           |           |           |           |           |           |           |           |           |           |           |           |           |
|-------------------------------|--------|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| AADAC                         | Area 1 | 4          |           |           |           |           |           |           |           |           |           |           |           | 1         | 2         | 1         |
| ABORIGINAL LEARNING CENTRE    | Area 3 | 90         | 40        | 20        | 20        | 10        |           |           |           |           |           |           |           |           |           |           |
| CHILDREN'S VILLAGE            | Area 2 | 59         |           | 3         | 4         | 6         | 15        | 11        | 11        | 9         |           |           |           |           |           |           |
| CHRISTINE MEIKLE              | Area 1 | 77         |           |           |           |           |           |           |           |           | 8         | 13        | 12        | 13        | 15        | 16        |
| DR GORDON TOWNSEND            | Area 1 | 22         |           |           | 2         | 1         | 2         | 3         | 2         | 3         | 2         | 2         | 1         | 1         | 1         | 2         |
| DR OAKLEY                     | Area 7 | 156        |           |           |           |           | 5         | 28        | 50        | 36        | 24        | 11        | 2         |           |           |           |
| EMILY FOLLENSBEE              | Area 6 | 82         |           | 7         | 6         | 9         | 9         | 17        | 6         | 13        | 7         | 6         | 2         |           |           |           |
| NEXUS/TRUST TREATMENT/PROJECT | Area 3 | 22         |           |           |           |           |           |           |           |           |           |           |           | 2         | 7         | 13        |
| WEST VIEW SECONDARY           | Area 1 | 66         |           |           |           |           |           |           |           |           |           | 2         | 1         | 14        | 15        | 34        |
| WILLIAM ROPER HULL            | Area 6 | 107        |           |           | 1         | 2         | 2         | 5         | 7         | 8         | 10        | 16        | 13        | 14        | 17        | 12        |
| WOOD'S HOMES                  | Area 1 | 61         |           |           |           |           | 1         | 1         | 1         | 1         | 6         | 7         | 12        | 12        | 13        | 7         |
| YOUNG ADULT PROGRAM           | Area 1 | 39         |           |           |           |           |           |           |           |           |           | 1         | 5         | 11        | 11        | 11        |
| <b>TOTAL UNIQUE SETTINGS</b>  |        | <b>785</b> | <b>40</b> | <b>30</b> | <b>33</b> | <b>28</b> | <b>34</b> | <b>65</b> | <b>77</b> | <b>70</b> | <b>57</b> | <b>58</b> | <b>48</b> | <b>68</b> | <b>81</b> | <b>96</b> |

|   |              |              |   |   |           |           |           |           |           |           |           |           |           |           |           |              |
|---|--------------|--------------|---|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------|
| HOME EDUCATION                            | Windsor Park | 246          |   |   | 20        | 20        | 22        | 30        | 40        | 27        | 30        | 24        | 22        | 7         | 2         | 2            |
| CBe-LEARN*                                |              | 447          |   |   |           |           |           |           |           |           | 3         | 11        | 21        | 35        | 67        | 310          |
| CHINOOK LEARNING SERVICES*                |              | 2,164        |   |   |           |           |           |           |           |           |           |           |           | 4         | 8         | 2152         |
| <b>SUB-TOTAL</b>                          |              | <b>2,857</b> | - | - | <b>20</b> | <b>20</b> | <b>22</b> | <b>30</b> | <b>40</b> | <b>27</b> | <b>33</b> | <b>35</b> | <b>43</b> | <b>46</b> | <b>77</b> | <b>2,464</b> |
| *includes students 20 years old and older |              |              |   |   |           |           |           |           |           |           |           |           |           |           |           |              |

|                        |  |                |            |              |              |              |              |              |              |              |              |              |              |              |              |               |
|------------------------|--|----------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>TOTAL ENROLMENT</b> |  | <b>121,200</b> | <b>323</b> | <b>9,437</b> | <b>9,867</b> | <b>9,844</b> | <b>9,820</b> | <b>9,655</b> | <b>9,037</b> | <b>8,568</b> | <b>8,234</b> | <b>7,855</b> | <b>7,854</b> | <b>8,565</b> | <b>8,738</b> | <b>12,861</b> |
|------------------------|--|----------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|

**BUDGET  
REPORT  
FOR THE YEAR ENDING AUGUST 31, 2018**

[School Act, Sections 147(2)(b) and 276]

**3030 Calgary School District No. 19**

Legal Name of School Jurisdiction

403-817-7400 | 403-294-8254 (f) | dwelch@cbe.ab.ca

Telephone & Fax Numbers, Email Address

**BOARD CHAIR**

Joy Bowen-Eyre

Name

Signature

**SUPERINTENDENT**

David Stevenson

Name

Signature

**SECRETARY TREASURER or TREASURER**

Brad Grundy

Name

Signature

**Certified as an accurate summary of the year's budget as approved by the Board  
of Trustees at its meeting held on June 20, 2017 .**  
Date

Version: 170316

c.c. Alberta Education  
c/o Robert Mah, Financial Reporting & Accountability Branch  
8th Floor Commerce Place, 10155-102 Street, Edmonton AB T5J 4L5

E-MAIL: Robert.Mah@gov.ab.ca (780-427-3855)

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Color coded cells:

|  |  |  |  |
|--|--|--|--|
|  | blue cells: require the input of data/descriptors wherever applicable. |  | grey cells: data not applicable - protected                          |
|  | salmon cells: contain referenced juris. information - protected        |  | white cells: within text boxes REQUIRE the input of points and data. |
|  | green cells: populated based on information previously submitted       |  | yellow cells: to be completed when yellow only.                      |

**HIGHLIGHTS, PLANS, ASSUMPTIONS AND RISKS SUMMARY- 2017/2018 BUDGET REPORT**

The following were presented to the Board and approved as underlying the budget. These key points and assumptions used in development of the budget take into consideration the economic environment of the jurisdiction, focus on anticipated changes from current year, and are realistic and consistent with the three year Education Plan. At a minimum, they disclose key budget assumptions, financial & business risks, and specific strategies explaining how this budget will support the jurisdiction's plans.

**Budget Highlights, Plans & Assumptions:**

In consideration of our values and funding provided, our budget highlights are:

Funds allocated directly to schools via the Resource Allocation Method (RAM) have increased by \$12.5 million to fund enrolment growth of 1.7 per cent and the opening of four new schools.

Instructional supplies or materials and transportation fees have been reduced or eliminated under Bill 1: An Act to Reduce School Fees which will make life more affordable for Albertans. A government grant of approximately \$18.3 million will be received in lieu of fees charged.

This budget reflects best estimates and the assumption that transportation expenses will be fully funded by targeted government grants and fees for students who do not qualify for fee-free or fee-reduced transportation service. No dollars will be contributed from the global budget to support transportation. The portion of the fee replacement grant applied to transportation is approximately \$7.9 million in lieu of fees charged

The number of school-based teachers will increase by 92 full time equivalent positions and support staff by 26 full time equivalent positions.

School budgets have been reduced by 1.4 per cent (on a status-quo basis) and of the operating budget amount that would have been required to maintain operations at a level similar to 2016-17. Service units by 3.7 per cent (on an absolute basis).

Non-facility capital project spending is budgeted at \$22.9 million, including \$2.6 million to support the commissioning of new schools scheduled to open in the 2018-19 year, \$2.2 million for wireless upgrades to address functionality issues, \$5.6 million for technology replacement and refresh and \$7.0 million for the development and implementation of the new Student Information System (SIS).

As required by law, the budget for 2017-18 is balanced.

**Significant Business and Financial Risks:**

As part of the budget development process, budget risks have been identified where there are circumstances that may result in financial pressures that cannot be completely estimated at this time.

Please see our full risk discussion in our Budget Report. These include:

- Declining enrolment growth
- Non school-based supports not keeping up with enrolment growth
- Inflation
- Systemic health – technology, infrastructure, volume, etc.
- Elimination of budget conservatism
- Mid-year provincial budget announcements
- Long-term transportation strategy and the impact of Bill 1: An Act to Reduce School Fees
- Use of reserves to balance

**BUDGETED STATEMENT OF OPERATIONS**  
for the Year Ending August 31

|   | Approved<br>Budget<br>2017/2018 | Fall Budget<br>Update<br>2016/2017 | Actual<br>2015/2016    |
|---|---------------------------------|------------------------------------|------------------------|
| <b>REVENUES</b>                           |                                 |                                    |                        |
| Alberta Education                         | \$1,274,436,000                 | \$1,230,690,000                    | \$1,208,794,000        |
| Other - Government of Alberta             | \$328,000                       | \$618,000                          | \$733,000              |
| Federal Government and First Nations      | \$3,207,000                     | \$2,650,000                        | \$2,987,000            |
| Other Alberta school authorities          | \$303,000                       | \$572,000                          | \$648,000              |
| Out of province authorities               | \$0                             | \$0                                | \$0                    |
| Alberta Municipalities-special tax levies | \$0                             | \$0                                | \$0                    |
| Property taxes                            | \$0                             | \$0                                | \$0                    |
| Fees                                      | \$38,094,000                    | \$51,456,000                       | \$49,876,000           |
| Other sales and services                  | \$25,144,000                    | \$19,360,000                       | \$27,272,000           |
| Investment income                         | \$3,167,000                     | \$3,345,000                        | \$12,146,000           |
| Gifts and donations                       | \$7,266,000                     | \$6,142,000                        | \$8,740,000            |
| Rental of facilities                      | \$5,393,000                     | \$6,281,000                        | \$6,867,000            |
| Fundraising                               | \$7,200,000                     | \$9,800,000                        | \$7,166,000            |
| Gains on disposal of capital assets       | -                               | \$0                                | \$44,000               |
| Other revenue                             | -                               | \$58,000                           | \$426,000              |
| <b>TOTAL REVENUES</b>                     | <b>\$1,364,538,000</b>          | <b>\$1,330,972,000</b>             | <b>\$1,325,699,000</b> |
| <b>EXPENSES</b>                           |                                 |                                    |                        |
| Instruction - Early Childhood Services    | \$57,353,000                    | \$55,553,000                       | \$49,003,000           |
| Instruction - Grades 1-12                 | \$1,030,679,000                 | \$1,015,538,000                    | \$988,983,000          |
| Plant operations & maintenance            | \$182,195,000                   | \$174,053,000                      | \$167,923,000          |
| Transportation                            | \$48,065,000                    | \$45,393,000                       | \$48,447,000           |
| Administration                            | \$37,495,000                    | \$37,073,000                       | \$33,548,000           |
| External Services                         | \$23,751,000                    | \$23,188,000                       | \$23,234,000           |
| <b>TOTAL EXPENSES</b>                     | <b>\$1,379,538,000</b>          | <b>\$1,350,798,000</b>             | <b>\$1,311,138,000</b> |
| <b>ANNUAL SURPLUS (DEFICIT)</b>           | <b>(\$15,000,000)</b>           | <b>(\$19,826,000)</b>              | <b>\$14,561,000</b>    |

**BUDGETED ALLOCATION OF EXPENSES (BY OBJECT)**  
for the Year Ending August 31

|                                       | Approved<br>Budget<br>2017/2018 | Fall Budget<br>Update<br>2016/2017 | Actual<br>2015/2016    |
|---------------------------------------|---------------------------------|------------------------------------|------------------------|
| <b>EXPENSES</b>                       |                                 |                                    |                        |
| Certificated salaries                 | \$647,031,000                   | \$632,097,000                      | \$627,085,000          |
| Certificated benefits                 | \$145,251,000                   | \$143,217,000                      | \$142,787,000          |
| Non-certificated salaries and wages   | \$215,931,000                   | \$206,655,000                      | \$200,703,000          |
| Non-certificated benefits             | \$58,211,000                    | \$56,024,000                       | \$48,632,000           |
| Services, contracts, and supplies     | \$240,065,000                   | \$247,869,000                      | \$233,130,000          |
| <b>Capital and debt services</b>      |                                 |                                    |                        |
| <b>Amortization of capital assets</b> |                                 |                                    |                        |
| Supported                             | \$39,189,000                    | \$33,141,000                       | \$29,221,000           |
| Unsupported                           | \$28,150,000                    | \$24,229,000                       | \$22,871,000           |
| <b>Interest on capital debt</b>       |                                 |                                    |                        |
| Supported                             | \$128,000                       | \$188,000                          | \$463,000              |
| Unsupported                           | \$687,000                       | \$687,000                          | \$257,000              |
| Other interest and finance charges    | \$1,093,000                     | \$1,248,000                        | \$793,000              |
| Losses on disposal of capital assets  | \$0                             | \$0                                | \$0                    |
| Other expenses                        | \$3,802,000                     | \$5,443,000                        | \$5,196,000            |
| <b>TOTAL EXPENSES</b>                 | <b>\$1,379,538,000</b>          | <b>\$1,350,798,000</b>             | <b>\$1,311,138,000</b> |

**BUDGETED SCHEDULE OF FEE REVENUE**  
for the Year Ending August 31

|  | Approved<br>Budget<br>2017/2018 | Fall Budget<br>Update<br>2016/2017 | Actual<br>2015/2016 |
|--|---------------------------------|------------------------------------|---------------------|
| <b>FEEES</b>   |                                 |                                    |                     |
| TRANSPORTATION   | \$5,930,000                     | \$8,509,000                        | \$8,172,000         |
| BASIC INSTRUCTION SUPPLIES (Instructional supplies, & materials) |                                 | \$10,670,000                       | \$10,395,000        |
| LUNCHROOM SUPERVISION & ACTIVITY FEES (Optional)                 | \$13,965,000                    | \$14,003,000                       | \$13,440,000        |
| <b>FEEES TO ENHANCE BASIC INSTRUCTION</b>                        |                                 |                                    |                     |
| Technology user fees   | \$3,000                         | \$0                                | \$0                 |
| Alternative program fees   | \$757,000                       | \$0                                | \$408,000           |
| Fees for optional courses  | \$2,868,000                     | \$6,612,000                        | \$2,501,000         |
| Students from other boards                                       |                                 |                                    | \$0                 |
| Tuition from ineligible students                                 |                                 |                                    | \$0                 |
| ECS enhanced program fees  | \$0                             | \$0                                | \$0                 |
| <b>ACTIVITY FEES</b>   |                                 |                                    |                     |
| Other fees to enhance education                                  | \$0                             |                                    |                     |
| Other enhancement fees   |                                 | \$0                                | \$0                 |
| Other enhancement fees   |                                 | \$0                                | \$0                 |
| Other enhancement fees   |                                 | \$0                                | \$0                 |
| Other enhancement fees   |                                 | \$0                                | \$0                 |
| Other enhancement fees   |                                 | \$0                                | \$0                 |
| <b>NON-CURRICULAR FEES</b>                                       |                                 |                                    |                     |
| Extra-curricular fees  | \$3,067,000                     | \$675,000                          | \$3,769,000         |
| Non-curricular supplies and materials                            | \$0                             | \$0                                | \$0                 |
| <b>NON-CURRICULAR TRAVEL</b>                                     |                                 |                                    |                     |
| OTHER FEES   | \$0                             |                                    |                     |
| Other non-curricular fees  |                                 | \$810,000                          | \$901,000           |
| Other non-curricular fees  |                                 | \$740,000                          | \$0                 |
| Other non-curricular fees  |                                 | \$0                                | \$0                 |
| Other non-curricular fees  |                                 | \$0                                |                     |
| Other non-curricular fees  |                                 | \$0                                |                     |
| <b>TOTAL FEES</b>  | \$38,094,000                    | \$51,456,000                       | \$49,876,000        |

\*PLEASE DO NOT USE "SCHOOL GENERATED FUNDS" AS A CATEGORY

| Please disclose amounts paid by parents of students that are recorded as "Other sales and services" (rather than fee revenue). Note that this schedule should include only amounts collected from parents and so it may not agree with the Statement of Operations. | Approved<br>Budget<br>2017/2018 | Fall Budget<br>Update<br>2016/2017 | Actual<br>2015/2016 |
|---|---------------------------------|------------------------------------|---------------------|
| Cafeteria sales, hot lunch, milk programs   | \$0                             | \$0                                | \$0                 |
| Special events  | \$0                             | \$0                                | \$0                 |
| Sales or rentals of other supplies/services   | \$4,640,000                     | \$0                                | \$0                 |
| Out of district student revenue   | \$0                             | \$0                                |                     |
| International and out of province student revenue   | \$9,396,000                     | \$8,338,000                        |                     |
| Student travel (international, recognition trips, non-curricular)   |                                 |                                    | \$1,659,000         |
| Adult education revenue   | \$3,298,000                     | \$3,187,000                        | \$3,018,000         |
| Preschool   | \$0                             | \$0                                |                     |
| Child care & before and after school care   | \$0                             | \$0                                | \$0                 |
| Lost item replacement fees  | \$0                             | \$0                                |                     |
| Other (describe)  | \$0                             | \$0                                | \$9,196,000         |
| Other (describe)  | \$0                             | \$0                                | \$307,000           |
| Other (describe) International travel   |                                 | \$0                                | \$0                 |
| Other (describe)  | \$0                             | \$0                                |                     |
| Other (describe)  | \$0                             | \$0                                |                     |
| <b>TOTAL</b>  | \$17,334,000                    | \$11,525,000                       | \$14,180,000        |

**BUDGETED SCHEDULE OF SUPPLEMENTARY DETAILS OF FEE REVENUE**  
for the Year Ending August 31

| (A)                                      | (B)   | (C)  | (D)                                      | (E)                                    | (F)                |
|--|---|--|--|--|--------------------|
|  | Explanation<br>of Other Costs (Column "(C)")  | Other Costs<br>(Explain under (B))*<br>2017/2018 | Transportation<br>Component<br>2017/2018 | Supplies &<br>Materials**<br>2017/2018 | Total<br>2017/2018 |
| <b>FEES</b>                              |   |  |  |  |                    |
|  | TRANSPORTATION  | \$0  | \$5,930,000                              | \$0                                    | \$5,930,000        |
|  | LUNCH SUPERVISION & ACTIVITY <span style="float:right">Salaries &amp; Benefits</span> | \$10,942,000                                     |  | \$3,023,000                            | \$13,965,000       |
| <b>FEES TO ENHANCE BASIC INSTRUCTION</b> |   |  |  |  |                    |
|  | Technology user fees  | \$0  | \$0                                      | \$3,000                                | \$3,000            |
|  | Alternative program fees  | \$0  | \$0                                      | \$757,000                              | \$757,000          |
|  | Fees for optional courses   | \$0  | \$0                                      | \$2,868,000                            | \$2,868,000        |
|  | ECS enhanced program fees   | \$0  | \$0                                      | \$0                                    | \$0                |
|  | ACTIVITY FEES   | \$0  | \$0                                      | \$11,504,000                           | \$11,504,000       |
|  | Other fees to enhance education   | \$0  | \$0                                      |  | \$0                |
| <b>NON-CURRICULAR FEES</b>               |   |  |  |  |                    |
|  | Extra-curricular fees   | \$0  | \$0                                      | \$3,067,000                            | \$3,067,000        |
|  | Non-curricular supplies, materials, and services                                      | \$0  | \$0                                      | \$0                                    | \$0                |
|  | NON-CURRICULAR TRAVEL   | \$0  | \$0                                      | \$0                                    | \$0                |
| <b>OTHER FEES***</b>                     |   |  |  |  |                    |
|  |   | \$0  | \$0                                      |  | \$0                |
|  |   | \$0  | \$0                                      | \$0                                    | \$0                |
|  |   | \$0  | \$0                                      | \$0                                    | \$0                |
|  |   | \$0  | \$0                                      | \$0                                    | \$0                |
|  | <b>TOTAL FEES</b>   | \$10,942,000                                     | \$5,930,000                              | \$21,222,000                           | \$38,094,000       |

\*\*Supplies and Materials may include consumables (one-time use such as paper), reuseable supplies, equipment rental, workbooks).

\*\*\*Describe purpose of fees. DO NOT use blanket names such as "Kindergarten", "Instructional Fees", "School Division Fees", "Registration Fees", etc.

\*\*\*Where possible, use predefined categories as described on Pages 14 & 15 of the Budget Guidelines 2017/2018.

**PROJECTED SCHEDULE OF CHANGES IN ACCUMULATED OPERATING SURPLUS (SUMMARY)**  
for the Year Ending August 31

|   | (1)  | (2)  | (3)         | (4)  | (5)                     | (6)                   | (7)                 |
|---|--|--|-------------|--|-------------------------|-----------------------|---------------------|
|   | ACCUMULATED<br>OPERATING<br>SURPLUS<br>(2+3+4+7) | INVESTMENT IN<br>TANGIBLE<br>CAPITAL<br>ASSETS | ENDOWMENTS  | ACCUMULATED<br>SURPLUS FROM<br>OPERATIONS<br>(5+6) | UNRESTRICTED<br>SURPLUS | INTERNALLY RESTRICTED |                     |
|   |  |  |             |  |                         | OPERATING<br>RESERVES | CAPITAL<br>RESERVES |
| <b>Actual balances per AFS at August 31, 2016</b>         | \$230,250,000                                    | \$147,373,000                                  | \$3,856,000 | \$39,803,000                                       | \$0                     | \$39,803,000          | \$39,218,000        |
| <b>2016/2017 Estimated impact to AOS for:</b>             |  |  |             |  |                         |                       |                     |
| Prior period adjustment                                   | \$0  | \$0  | \$0         | \$0  | \$0                     | \$0                   | \$0                 |
| Estimated surplus(deficit)                                | (\$22,087,000)                                   |  |             | (\$22,087,000)                                     | (\$22,087,000)          |                       |                     |
| Estimated board funded capital asset additions            |  | \$46,909,000                                   |             | (\$46,909,000)                                     | (\$46,909,000)          | \$0                   | \$0                 |
| Estimated disposal of unsupported tangible capital assets | \$0  | \$0  |             | \$0  | \$0                     |                       | \$0                 |
| Estimated amortization of capital assets (expense)        |  | (\$57,370,000)                                 |             | \$57,370,000                                       | \$57,370,000            |                       |                     |
| Estimated capital revenue recognized - Alberta Education  |  | \$33,141,000                                   |             | (\$33,141,000)                                     | (\$33,141,000)          |                       |                     |
| Estimated capital revenue recognized - Other GOA          |  | \$0  |             | \$0  | \$0                     |                       |                     |
| Estimated capital revenue recognized - Other sources      |  | \$0  |             | \$0  | \$0                     |                       |                     |
| Estimated changes in Endowments                           | \$0  |  | \$0         | \$0  | \$0                     |                       |                     |
| Estimated unsupported debt principal repayment            |  | \$3,765,000                                    |             | (\$3,765,000)                                      | (\$3,765,000)           |                       |                     |
| Estimated reserve transfers (net)                         |  |  |             | \$19,645,000                                       | \$48,532,000            | (\$28,887,000)        | (\$19,645,000)      |
| Estimated assumptions/transfers of operations (explain)   | \$0  | \$0  | \$0         | \$0  | \$0                     | \$0                   | \$0                 |
| <b>Estimated Balances for August 31, 2017</b>             | \$208,163,000                                    | \$173,818,000                                  | \$3,856,000 | \$10,916,000                                       | \$0                     | \$10,916,000          | \$19,573,000        |
| <b>2016/2017 Budget projections for:</b>                  |  |  |             |  |                         |                       |                     |
| Budgeted surplus(deficit)                                 | (\$15,000,000)                                   |  |             | (\$15,000,000)                                     | (\$15,000,000)          |                       |                     |
| Projected board funded capital asset additions            |  | \$19,618,000                                   |             | (\$19,618,000)                                     | (\$19,618,000)          | \$0                   | \$0                 |
| Budgeted disposal of unsupported tangible capital assets  | \$0  | \$0  |             | \$0  | \$0                     |                       | \$0                 |
| Budgeted amortization of capital assets (expense)         |  | (\$67,339,000)                                 |             | \$67,339,000                                       | \$67,339,000            |                       |                     |
| Budgeted capital revenue recognized - Alberta Education   |  | \$39,189,000                                   |             | (\$39,189,000)                                     | (\$39,189,000)          |                       |                     |
| Budgeted capital revenue recognized - Other GOA           |  | \$0  |             | \$0  | \$0                     |                       |                     |
| Budgeted capital revenue recognized - Other sources       |  | \$0  |             | \$0  | \$0                     |                       |                     |
| Budgeted changes in Endowments                            | \$0  |  | \$0         | \$0  | \$0                     |                       |                     |
| Budgeted unsupported debt principal repayment             |  | \$3,292,000                                    |             | (\$3,292,000)                                      | (\$3,292,000)           |                       |                     |
| Projected reserve transfers (net)                         |  |  |             | \$4,760,000  | \$9,760,000             | (\$5,000,000)         | (\$4,760,000)       |
| Projected assumptions/transfers of operations (explain)   | \$0  | \$0  | \$0         | \$0  | \$0                     | \$0                   | \$0                 |
| <b>Projected Balances for August 31, 2018</b>             | \$193,163,000                                    | \$168,578,000                                  | \$3,856,000 | \$5,916,000  | \$0                     | \$5,916,000           | \$14,813,000        |

SCHEDULE OF USES FOR ACCUMULATED SURPLUSES AND RESERVES  
for the Year Ending August 31

|   | Unrestricted Surplus Usage |                |                | Operating Reserves Usage |             |             | Capital Reserves Usage |              |              |
|---|----------------------------|----------------|----------------|--------------------------|-------------|-------------|------------------------|--------------|--------------|
|   | Year Ended                 |                |                | Year Ended               |             |             | Year Ended             |              |              |
|   | 31-Aug-2018                | 31-Aug-2019    | 31-Aug-2020    | 31-Aug-2018              | 31-Aug-2019 | 31-Aug-2020 | 31-Aug-2018            | 31-Aug-2019  | 31-Aug-2020  |
| Projected opening balance   | \$0                        | \$0            | (\$7,324,000)  | \$10,916,000             | \$5,916,000 | \$5,916,000 | \$19,573,000           | \$14,813,000 | \$14,813,000 |
| Projected excess of revenues over expenses (surplus only)         | \$0                        | \$0            | \$0            |                          |             |             |                        |              |              |
| Budgeted disposal of unsupported tangible capital assets          | \$0                        | \$0            | \$0            |                          | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Budgeted amortization of capital assets (expense)                 | \$67,339,000               | \$67,339,000   | \$67,339,000   |                          | \$0         | \$0         |                        |              |              |
| Budgeted capital revenue recognized                               | (\$39,189,000)             | (\$39,189,000) | (\$39,189,000) |                          | \$0         | \$0         |                        |              |              |
| Budgeted changes in Endowments                                    | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Budgeted unsupported debt principal repayment                     | (\$3,292,000)              | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Projected reserves transfers (net)                                | \$9,760,000                | \$0            | \$0            | (\$5,000,000)            | \$0         | \$0         | (\$4,760,000)          | \$0          | \$0          |
| Projected assumptions/transfers of operations                     | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Increase in (use of) school generated funds                       | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| New school start-up costs   | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Decentralized school reserves                                     | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Non-recurring certificated remuneration                           | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Non-recurring non-certificated remuneration                       | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Non-recurring contracts, supplies & services                      | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Professional development, training & support                      | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Salary negotiation expenses                                       | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Full-day kindergarten   | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| English language learners   | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| First nations, Metis, Inuit                                       | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| OH&S / wellness programs  | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| B & S administration organization / reorganization                | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Debt repayment  | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Fort McMurray wild fire related costs (unfunded)                  | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Non-salary related programming costs (explain)                    | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - School building & land                    | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - Technology                                | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - Vehicle & transportation                  | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - Administration building                   | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - POM building & equipment                  | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Repairs & maintenance - Other (explain)                           | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        |              |              |
| Capital costs - School land & building                            | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - School modernization                              | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - School modular & additions                        | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - School building partnership projects              | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - Technology  | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - Vehicle & transportation                          | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - Administration building                           | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - POM building & equipment                          | \$0                        | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Capital costs - Other   | (\$19,618,000)             | \$0            | \$0            | \$0                      | \$0         | \$0         | \$0                    | \$0          | \$0          |
| Building leases   | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Projected deficit   | (\$15,000,000)             | (\$35,474,000) | (\$52,447,000) |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Other 2 - please use this row only if no other row is appropriate | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Other 3 - please use this row only if no other row is appropriate | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Other 4 - please use this row only if no other row is appropriate | \$0                        | \$0            | \$0            |                          | \$0         | \$0         |                        | \$0          | \$0          |
| Estimated closing balance for operating contingency               | \$0                        | (\$7,324,000)  | (\$31,621,000) | \$5,916,000              | \$5,916,000 | \$5,916,000 | \$14,813,000           | \$14,813,000 | \$14,813,000 |

Total surplus as a percentage of 2018 Expenses 1.50% 0.97% -0.79%  
ASO as a percentage of 2018 Expenses 0.43% -0.10% -1.86%

**ANTICIPATED CHANGES IN ACCUMULATED OPERATING SURPLUS (SUPPLEMENTARY DETAIL)  
for the Year Ending August 31**

The following provides further explanation of the anticipated changes to each component of AOS for the 2016/2017, 2017/2018, 2018/2019, and 2019/2020 years as outlined on pages 6 and 7. Please provide information on the acquisition of significant unsupported capital, non-recurring project expenditures, and intended use of funds to August 31, 2020. Note that unrestricted surplus, operating reserves, and/or capital reserves should include the jurisdiction's contingency for unexpected or emergent issues.

**Additional detail on uses of Accumulated Operating Surplus:**

**2016/2017**

Provide an explanation of material changes from the fall budget update originally submitted in November, 2016 for annual operating surplus (deficit), capital acquisitions, endowments, and/or other changes affecting unrestricted surplus, operating reserves, and capital reserves.

In the Fall 2016 Budget Update we planned for a use of \$33.0 million operating reserves and \$25.9 million capital reserves.

Our revised planned use of Accumulated Operating Surplus for 2016-17 is \$28.9 million of operating reserves and \$19.6 million of capital reserves. The reduction is due to projects that have had timing delays.

**2017/2018**

Please provide additional detail regarding uses of unrestricted surplus, operating reserves, and capital reserves not described on pages 6 and 7.

The current year operating deficit of \$15.0 million is linked to:

- Costs related to projected enrolment growth and new schools opening;
- Grid movement for all employees; and
- Inflation and foreign exchange pressures.

Capital reserves will be used for:

- Construction of a gymnasium at Nelson Mandela High School
- Commissioning of new schools and modernizations

**ANTICIPATED CHANGES IN ACCUMULATED OPERATING SURPLUS (SUPPLEMENTARY DETAIL)  
for the Year Ending August 31**

The following provides further explanation of the anticipated changes to each component of AOS for the 2016/2017, 2017/2018, 2018/2019, and 2019/2020 years as outlined on pages 6 and 7. Please provide information on the acquisition of significant unsupported capital, non-recurring project expenditures, and intended use of funds to August 31, 2020. Note that unrestricted surplus, operating reserves, and/or capital reserves should include the jurisdiction's contingency for unexpected or emergent issues.

**Additional detail on uses of Accumulated Operating Surplus:**

**2018/2019**

Please provide additional detail regarding uses of unrestricted surplus, operating reserves, and capital reserves not described on pages 6 and 7.

We are projecting a deficit in 2018-19 in order to maintain operations at current service levels. We will use a combination of cost reduction strategies and reserves to balance, however the amounts have not yet been determined.

**2019/2020**

Please provide additional detail regarding uses of unrestricted surplus, operating reserves, and capital reserves not described on pages 6 and 7.

We are projecting a deficit in 2019-20 in order to maintain operations at current service levels. We will use a combination of cost reduction strategies and reserves to balance, however the amounts have not yet been determined.

**August 31, 2020**

Describe the jurisdiction's intended use of unrestricted surplus, operating reserves, and capital reserves balances expected as at August 31, 2020.

We are projecting a deficit in 2020-21 in order to maintain operations at current service levels. We will use a combination of cost reduction strategies and reserves to balance, however the amounts have not yet been determined.

**PROJECTED STUDENT STATISTICS  
FULL TIME EQUIVALENT (FTE) ENROLLED STUDENTS**

|   | <b>Budgeted<br/>2017/2018<br/>(Note 2)</b> | <b>Actual<br/>2016/2017</b> | <b>Actual<br/>2015/2016</b> | <b>Notes</b>  |
|---|--|-----------------------------|-----------------------------|---|
| <b>GRADES 1 TO 12</b>                       |  |                             |                             |   |
| <b>Eligible Funded Students:</b>            |  |                             |                             |   |
| Grades 1 to 9                               | 81,028                                     | 78,783                      | 76,341                      | Head count  |
| Grades 10 to 12                             | 28,801                                     | 29,253                      | 29,479                      | Note 3  |
| <b>Total</b>                                | <b>109,829</b>                             | <b>108,036</b>              | <b>105,820</b>              | Grades 1-12 students eligible for base instruction funding from Alberta Education.            |
| Percentage Change                           | 1.7%                                       | 2.1%                        |                             |   |
| <b>Other Students:</b>                      |  |                             |                             |   |
| <b>Total</b>                                | <b>1,403</b>                               | <b>1,616</b>                | <b>1,586</b>                | Note 4  |
| <b>Total Net Enrolled Students</b>          | <b>111,232</b>                             | <b>109,652</b>              | <b>107,406</b>              |   |
| <b>Home Ed and Blended Program Students</b> | <b>180</b>                                 | <b>168</b>                  | <b>177</b>                  | Note 5  |
| <b>Total Enrolled Students, Grades 1-12</b> | <b>111,412</b>                             | <b>109,820</b>              | <b>107,583</b>              |   |
| Percentage Change                           | 1.4%                                       | 2.1%                        |                             |   |
| <b>Of the Eligible Funded Students:</b>     |  |                             |                             |   |
| Students with Severe Disabilities           | 5,443                                      | 5,122                       | 4,838                       | FTE of students with severe disabilities as reported by the board via PASI.                   |
| Students with Mild/Moderate Disabilities    | 14,274                                     | 13,418                      | 13,225                      | FTE of students identified with mild/moderate disabilities as reported by the board via PASI. |

**EARLY CHILDHOOD SERVICES (ECS)**

|  |              |              |              |   |
|--|--------------|--------------|--------------|---|
| <b>Eligible Funded Children</b>          | 9,788        | 9,327        | 9,402        | ECS children eligible for ECS base instruction funding from Alberta Education.                |
| <b>Other Children</b>                    |              |              | -            | ECS children not eligible for ECS base instruction funding from Alberta Education.            |
| <b>Total Enrolled Children - ECS</b>     | <b>9,788</b> | <b>9,327</b> | <b>9,402</b> |   |
| <b>Program Hours</b>                     | <b>475</b>   | <b>475</b>   | <b>475</b>   | Minimum: 475 Hours  |
| <b>FTE Ratio</b>                         | <b>0.500</b> | <b>0.500</b> | <b>0.500</b> | Actual hours divided by 950   |
| <b>FTE's Enrolled, ECS</b>               | <b>4,894</b> | <b>4,664</b> | <b>4,701</b> |   |
| Percentage Change                        | 4.9%         | -0.8%        |              |   |
| <b>Of the Eligible Funded Children:</b>  |              |              |              |   |
| Students with Severe Disabilities        | 337          | 356          | 341          | FTE of students with severe disabilities as reported by the board via PASI.                   |
| Students with Mild/Moderate Disabilities | 535          | 538          | 535          | FTE of students identified with mild/moderate disabilities as reported by the board via PASI. |

**NOTES:**

- Enrolment is to be completed WHEREVER APPLICABLE and are 'as at September 30th' for each year.
- Budgeted enrolment is to be based on best information available at time of the 2016/2017 budget report preparation.
- The # of FTE grade 10-12 students is determined by taking the total # of students' credits / 35; where 35 CEU's = 1 FTE.
- Other Grade 1-12 students that are not eligible for base instruction funding from Alberta Education include First Nations students living on reserves for which tuition fee payments are made from Band or AANDC (Code 330), students younger than 5 1/2 or older than 20, and out-of-province and foreign students.
- Because they are funded separately, Home Education students are not included with total net enrolled students. In the blended program, funding per student is pro-rated on the percentage of the student's program which is taken at school and at home; home education students are assigned a weighting of 0.25 FTE for base funding.

**PROJECTED STAFFING STATISTICS  
FULL TIME EQUIVALENT (FTE) PERSONNEL**

|   | Budgeted<br>2017/2018 | Actual<br>2016/2017 | Fall Budget<br>2016/2017 | Actual<br>2015/2016 | Notes   |
|---|-----------------------|---------------------|--------------------------|---------------------|---|
| <b>CERTIFICATED STAFF</b>   |                       |                     |                          |                     |   |
| School Based  | 6,385.7               | 6,293.5             | 6,293.5                  | 6,092.9             | Teacher certification required for performing functions at the school level.                        |
| Non-School Based  | 145.1                 | 149.2               | 149.2                    | 135.1               | Teacher certification required for performing functions at the system/central office level.         |
| Total Certificated Staff FTE  | 6,530.8               | 6,442.7             | 6,442.7                  | 6,228.0             | FTE for personnel possessing a valid Alberta teaching certificate or equivalency.                   |
| Percentage change from prior period   | 1.4%                  | 3.4%                | 1.4%                     | 3.4%                | Enrolment   |
| If an average standard cost is used, please disclose rate:  | \$ 100,771            | \$ 100,500          |                          | \$ 101,800          |   |
| Student F.T.E. per certificated Staff   | 17.8                  | 17.8                |                          | 18.0                |   |
| <b>Certificated Staffing Change due to:</b>   | Please Allocate       | Please Allocate     |                          |                     |   |
|   | 88.1                  | -                   |                          |                     |   |
| Enrolment Change  | 92.2                  | 94.2                | 214.7                    |                     | If negative change impact, the small class size initiative is to include any/all teachers retained. |
| Small Class Size Initiative   | -                     | -                   | n/a                      |                     | If enrolment change impact on teacher FTEs is negative, include any/all teachers retained.          |
| Other Factors   | (4.1)                 | 40.0                | n/a                      |                     | Descriptor (required): Moved Area-based staff to Learning Service Unit (2017-18)                    |
| Total Change  | 88.1                  | 134.2               | n/a                      |                     | Year-over-year change in Certificated FTE   |
| <b>Breakdown, where total change is Negative:</b>   |                       |                     |                          |                     |   |
| Continuous contracts terminated   | -                     | -                   | n/a                      |                     | FTEs  |
| Non-permanent contracts not being renewed   | -                     | -                   | n/a                      |                     | FTEs  |
| Other (retirement, attrition, etc.)   | -                     | -                   | n/a                      |                     | Descriptor (required):  |
| Total Negative Change in Certificated FTEs  | -                     | -                   | n/a                      |                     | Breakdown required where year-over-year total change in Certificated FTE is 'negative' only.        |
| <b>NON-CERTIFICATED STAFF</b>   |                       |                     |                          |                     |   |
| Instructional   | 2,167.0               | 2,149.9             | 2,149.9                  | 2,098.4             | Personnel providing instruction support for schools under 'Instruction' program areas.              |
| Plant Operations & Maintenance  | 844.8                 | 882.9               | 882.9                    | 824.1               | Personnel providing support to maintain school facilities   |
| Transportation  | 43.5                  | 43.0                | 43.0                     | 42.5                | Personnel providing direct support to the transportation of students to and from school             |
| Other   | 418.8                 | 411.3               | 411.3                    | 416.8               | Personnel in Board & System Admin. and External service areas.                                      |
| Total Non-Certificated Staff FTE  | 3,474.0               | 3,487.1             | 3,487.1                  | 3,381.8             | FTE for personnel not possessing a valid Alberta teaching certificate or equivalency.               |
| Percentage Change   | -0.4%                 | 3.1%                | -0.4%                    | 3.1%                |   |
| <b>Explanation of Changes:</b>  |                       |                     |                          |                     |   |
| Instructional increases due to increase in enrolment and new schools. PO&M decreases due to reductions related to the budget.   |                       |                     |                          |                     |   |
| <b>Additional Information</b>   |                       |                     |                          |                     |   |
| Are non-certificated staff subject to a collective agreement? <input type="text" value="Some are"/>   |                       |                     |                          |                     |   |
| Please provide terms of contract for 2017/18 and future years for non-certificated staff subject to a collective agreement along with the number of qualifying staff FTE's. |                       |                     |                          |                     |   |
| All non-certificated collective agreements have wage re-opener clause, subject to ratification.   |                       |                     |                          |                     |   |

**BOARD AND SYSTEM ADMINISTRATION  
2017/2018 EXPENSES UNDER (OVER) MAXIMUM LIMIT**

3030

**TOTAL EXPENSES (From "Total" column of Line 28 of Schedule of Program Operations)** **\$1,379,538,000**

**Enter Number of Net Enrolled Students:** **111,232**

**Enter Number of Funded (ECS) Children:** **9,788**

**Enter "C" if Charter School**

**STEP 1**

**Calculation of maximum expense limit percentage for Board and System Administration expenses**

If "Total Net Enrolled Students" are 6,000 and over = 3.6% **3.60%**

If "Total Net Enrolled Students" are 2,000 and less = 5.4%

2.72%

The Maximum Expense Limit for Board and System Administration is based on an arithmetical proration for the TOTAL FTE count for grades 1 -12, net of Home Education AND Adult students, between 2,000 to 6,000 at .00045 per FTE (Example: 4,500 FTE count grades 1-12 = 6,000 - 4,500 = 1,500 X .00045 = 0.675% plus 3.6% = maximum expense limit of 4.28%).

**STEP 2**

**A. Calculate maximum expense limit amounts for Board and System Administration expenses**

Maximum Expense Limit percentage (Step 1) x TOTAL EXPENSES **\$49,663,368**

**B. Considerations for Charter Schools and Small School Boards:**

If charter schools and small school boards,

**The amount of Small Board Administration funding** (*Funding Manual* Section 1.13) **\$0**

**2017/2018 MAXIMUM EXPENSE LIMIT (the greater of A or B above)** **\$49,663,368**

**Actual Board & System Administration from G31 of "Budgeted Statement of Operations"** **\$37,495,000**

**Amount Overspent** **\$0**

## report to Board of Trustees

### Revision to the Schedule of Regular Meetings

|                             |   |
|-----------------------------|---|
| Date                        | June 13, 2017   |
| Meeting Type                | Regular Meeting, Public Agenda  |
| To                          | Board of Trustees   |
| From                        | Kelly-Ann Fenney<br>Assistant General Counsel and Corporate Secretary       |
| Purpose                     | Decision  |
| Governance Policy Reference | Governance Culture<br>GC-2: Governing Commitments<br>GC-6: Annual Work Plan |

#### 1 | Recommendation

---

- THAT the Board of Trustees approves revisions to the Schedule of Regular Meetings, to:
  - 1) add a public meeting to be held on June 27, 2017, commencing at 12:00 pm, in the Multipurpose Room at 1221 - 8 Street SW, Calgary, Alberta;
  - 2) add a public meeting to be held on September 12, 2017, commencing at 1:30 p.m., in the Multipurpose Room at 1221 - 8 Street SW, Calgary, Alberta;
  - 3) add a public meeting to be held on September 19, 2017, commencing at 12:00 p.m., in the Multipurpose Room at 1221 – 8 Street SW, Calgary, Alberta;
  - 4) add a private meeting to be held on October 10, 2017, commencing at 12:00 p.m., in the Multipurpose Room at 1221 – 8 Street SW, Calgary, Alberta

#### 2 | Background

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On June 21, 2016, at the Board of Trustees' Organizational Meeting, the Board approved the Schedule of Regular Meetings for September 2016 to June 2017.



It has recently been brought to the Board's attention that it would be beneficial to add a public meeting on June 27, 2017 and to hold two public meetings and a private meeting in the fall, prior to the Municipal and School Board General Election in October 2017. The Board of Trustees generally approves its Schedule of Regular Meetings in the month of June at its Organizational Meeting. As this is an election year, the Board's Organizational Meeting will not take place until after the election date of October 16, 2017.

Attachment I: Schedule of Regular Meetings – revisions in tracked changes





Calgary Board  
of Education

**BOARD OF TRUSTEES  
SCHEDULE OF REGULAR MEETINGS  
SEPTEMBER 2016 TO JUNE ~~OCTOBER~~ 2017**  
held at the Education Centre, 1221 – 8 Street SW, Calgary, Alberta

| PUBLIC AGENDAS<br>12:00 p.m. to 3:00 p.m.<br>Multipurpose Room | PRIVATE AGENDAS<br>12:00 p.m. to 3:00 p.m.<br>Room T224 |
|--|---|
| September 13, 2016   |   |
| September 20, 2016   | September 27, 2016                                      |
| October 4, 2016  |   |
| October 11, 2016   | October 25, 2016  |
| November 1, 2016   |   |
| November 8, 2016   | November 23, 2016                                       |
| November 29, 2016  |   |
| December 6, 2016   | December 13, 2016                                       |
| January 10, 2017   |   |
| January 17, 2017   | January 31, 2017  |
| February 7, 2017   |   |
| February 14, 2017  | February 28, 2017                                       |
| March 7, 2017  |   |
| March 14, 2017   | March 21, 2017  |
| April 4, 2017  |   |
| April 11, 2017   | April 25, 2017  |
| May 16, 2017   |   |
| May 23, 2017   | May 30, 2017  |
| June 13, 2017  |   |
| June 20, 2017  | June 27, 2017   |
| June 27, 2017  |   |
| September 12, 2017 (1:30 – 4:30 pm)                            |   |
| September 19, 2017   | October 10, 2017  |

## report to Board of Trustees

## Correspondence

|                                |  |
|--------------------------------|--|
| Date                           | June 13, 2017  |
| Meeting Type                   | Regular Meeting, Public Agenda   |
| To                             | Board of Trustees  |
| From                           | Kelly Ann Fenney<br>Corporate Secretary  |
| Purpose                        | Information  |
| Governance Policy<br>Reference | Operational Expectations<br>OE-8: Communication With and Support for the Board |

### 1 | Recommendation

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This report is being provided for the information of the Board.

### 2 | Background

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The following is a summary of the correspondence provided to the Board:

- Email dated May 5, 2017 from The Honourable D. Eggen, Minister of Education, providing an update on Bill 1 and authorizing an extension to the deadline for submission of the budget.
- Letter dated May 18, 2017 from The Honourable D. Eggen, Minister of Education, responding to the Board's invitation for Alberta Education to become a partner in the proposed initiative with Bullfrog Power to install solar photovoltaic panels at four CBE schools.



**From:** EDC Minister <[Education.Minister@gov.ab.ca](mailto:Education.Minister@gov.ab.ca)>  
**Sent:** Friday, May 5, 2017 2:59 PM  
**Cc:** Richard Arnold  
**Subject:** Bill 1 Update and Budget Extension

**To: Board Chairs of Public, Separate, Francophone and Charter School Boards  
Presidents of Stakeholder Associations**  
ASBA (Alberta School Boards Association)  
ASCA (Alberta School Councils' Association)  
AAPCS (Association of Alberta Public Charter Schools)  
ASBOA (Association of School Business Officials of Alberta)  
CASS (College of Alberta School Superintendents)

I am writing to provide an update regarding Bill 1: An Act to Reduce School Fees. The Bill has been passed in the legislature and has received royal assent. Upon proclamation, the Bill will be in effect for the beginning of the 2017/2018 school year.

I would like to thank all stakeholders for their active participation and collaboration over the past month. My office and department staff have had excellent and thoughtful discussions and contributions from your organizations to help achieve the spirit and intent of Bill 1 – to reduce the burden of fees on parents accessing public education.

Much of your feedback has suggested that government consider a phased approach to the implementation of a new regulation in the coming 2017/2018 school year, and to allow school boards as much time as possible for implementation. To that end, I have authorized, by ministerial order, an extension to the deadline for school boards to submit their 2017/2018 school year budgets to Education. The new deadline is June 30, 2017. This extension is for the 2017/2018 budget submissions only. Government expects the new School Fees Regulation to be in place in early June and this extension will allow boards to submit their 2017/2018 budgets with full consideration of the new regulation. The June 30, 2017 deadline will also align with the requirement for boards to submit, for my review and approval, their updated school fee policy and fee schedule envisioned in Bill 1.

The development of this subsequent version of the regulation will include a more thorough consultation with impacted stakeholders and will align with the government's direction of further reducing or eliminating certain fee types.

Finally, with respect to fees for the 2017/2018 school year, it is my expectation that, during the July 2017 review of your school fee policy and schedule, no significant school or transportation fee increases will be proposed for the next school year. Government has provided \$54 million in support of Bill 1 and, while I recognize boards have made previous decisions regarding fees and service levels, I do not expect that there should be significant fee increases in 2017/2018. I would ask that you contact Richard Arnold at [richard.arnold@gov.ab.ca](mailto:richard.arnold@gov.ab.ca) if you are considering fee increases that were under consideration prior or post the introduction of Bill 1, before you commence your parental and community engagement, so I can have a greater understanding of what circumstances are creating the pressure for the increase.

Such exchanges would allow for you to clarify concerns and for us to collectively identify possible mitigation that would otherwise not be addressed until the formal submission for my review and approval on June 30. As the forthcoming regulations provide me with the authority

to review and approve your fee schedules, it is my intention to support you in implementing this policy shift and work together with you through this iterative process, rather than in a public forum that may distract us from our collective intended result: decreasing the burden of costs for parents with children in the public education system.

Thank you again for your contributions to the development of the School Fees Regulation and to moving this important policy forward. Education values your support and input as we work together to make life more affordable for Alberta families by reducing school fees. I have attached a set of key messages and frequently asked questions as tools that may assist you as you develop your own localized messaging when you engage with your parents on your proposed fee policies and schedules. Some of the stakeholder organizations that participated in the April 3 and 13 consultations contributed to these materials, and the intention of these documents is to reflect what was heard and discussed in those sessions.

Sincerely,

David Eggen  
Minister  
Alberta Education  
MLA for Edmonton-Calder  
Attachment: Bill 1 – Key Messages and FAQs

cc: Superintendents of Public, Separate, Francophone and Charter School Boards  
Executive Directors of Stakeholder Associations  
Secretary Treasurers of Public, Separate and Francophone School Boards  
Communications Contacts at School Divisions

## **Bill 1 – An Act to Reduce School Fees: Key Messages for Stakeholders**

- Through the proclamation of Bill 1, An Act to Reduce School Fees, the government is making life better and more affordable for Alberta families.
- All students deserve access to a quality education in an Alberta school, regardless of their individual circumstances or their ability to pay school fees.
- Through Bill 1, the government is eliminating fees for specific instructional supplies and materials, as well as transportation fees for students who live 2.4 kilometres or more away from their designated school.
- Together, these fees represent more than \$50 million, or approximately 25 per cent of the fees collected by school boards on an annual basis.
- Alberta Education is working with various education stakeholders—including school boards and school councils—to implement these reductions for the 2017/18 school year.
- This is the first step in reducing the burden of school fees on Alberta’s families. The government will continue to engage education stakeholders, including school boards and parents, in achieving additional reductions in future years.

### **Instructional supplies and materials:**

- Through the new School Fees Regulation, parents will no longer be charged fees for: textbooks; workbooks; photocopying and printing; or paper.
- In addition, common fees specifically related to instructional supplies and materials, which were previously charged to an entire student body or grade cohort will be eliminated. School boards have previously referred to such fees as—among other titles—instructional fees, instructional materials, or basic fees.
- The removal of these fees will benefit the parents of nearly 600,000 students provincewide.

### **Transportation fees for eligible students:**

- Through the *School Act* and the *Student Transportation Regulation*, boards are required to provide transportation to and from a student’s designated school—for regular or special education programming—if the student resides 2.4 kilometres or more from that school.
- Through Bill 1, and the resulting amendments to the *Student Transportation Regulation*, fees will no longer be issued for the transportation of these eligible students.
- The removal of these busing fees will benefit the parents of approximately 145,000 students.
- In some circumstances—for example, if parents choose to enrol their child in a school other than their designated school, or a student resides less than 2.4 kilometres from their designated school—fees may still be incurred.

### **Funding:**

- Budget 2017 provides \$54 million in funding, in the 2017/18 school year, to reduce school fees.
- This funding will help offset the revenue loss projected as a result of Bill 1, and will help ensure that boards can maintain current educational programming without increasing other still-permitted school fees.
- Funding allocation to boards will be based on fee revenues as reported by boards in the Basic Instruction Fee category of their 2015/16 financial statements.
- The allocation uses 2015/16 data due to several boards having suspended fees in this category for the 2016/17 school year.
- While the decision on the allocation method for 2017/18 has been determined, it will be revisited for the 2018/19 school year.

Other school fees (i.e. lunch supervision, technology fees, etc.):

- In the long term, the amendments included in Bill 1 provide the Minister with increased authority over all school board fee types related to publicly funded education programming.
- The current focus is on eliminating fees, as of the 2017/18 school year, for specific instructional supplies and materials, and for the transportation of eligible students.
- Beyond 2017/18, we will continue to evaluate the effectiveness of the new school fees regulation, and will consider amendments to address other fees for future school years and as such we will continue to work with various stakeholders, including school boards and parents, throughout the process.

## **Bill 1 – An Act to Reduce School Fees: Frequently Asked Questions**

### **General:**

#### **1. When will the new School Fees regulation be complete?**

- We anticipate that the regulation will be in force in June.
- The department will continue to work with school boards, and other relevant stakeholders, to ensure implementation for September 2017.

#### **2. When will school fee reductions be implemented?**

- The reductions will be implemented for the 2017/18 school year.

#### **3. How much can parents expect to save?**

- The amount parents will save as a result of Bill 1 will vary, based on several factors.
- To date, the fees charged to parents have varied between school boards—and, from school to school.
- For parents whose children attend schools that did not previously charge the fees being eliminated through Bill 1, the savings may not be as apparent when compared to schools who did previously charge for these fees.
- For example, Bill 1 is eliminating fees for the transportation of students who attend their designated school, for regular or special education programs, and live 2.4 kilometres or more away from that school. Not all schools/school boards charged fees in this instance, so not all parents will be impacted by this specific reduction.

#### **4. Will parents still be charged for fees such as lunch-hour supervision fees, technology fees, and field trips?**

- Yes, for at least the 2017/18 school year, these fees are not being restricted. Therefore, school boards will be able to continue charging these fees, if they so choose.
- For the 2017/18 school year, the following fees are being eliminated:
  - textbook fees;
  - workbook fees;
  - printing and photocopying fees;
  - paper fees;
  - common fees, specifically related to instructional supplies and materials, charged to an entire student body or grade cohort; and
  - fees for the transportation of students attending their designated school and living 2.4 kilometres or more from that school.
- For the time being, school boards' ability to charge other fees is not being changed.
- However, the new School Fees Regulation will provide Minister with the authority to regulate these additional fees in the future.

#### **5. How is this reduction being funded?**

- Budget 2017 provides \$54 million in funding, in the 2017/18 school year, to reduce school fees.
- This funding will help offset the revenue loss projected as a result of Bill 1, and will help ensure that boards can maintain current educational programming without increasing other still-permitted school fees.

- Funding allocation to boards will be based on fee revenues as reported by boards in the Basic Instruction Fee category of their 2015/16 financial statements.
- The allocation uses 2015/16 data due to several boards having suspended fees in this category for the 2016/17 school year.
- While the decision on the allocation method for 2017/18 has been determined, it will be revisited for the 2018/19 school year.

**6. As a result of these reductions, should students/parents expect to see reductions to educational programs?**

- No. For the 2017/18 school year, school boards are being provided with funding to help offset revenue that will be lost as a result of Bill 1.
- This offsetting funding will help ensure that 2017/18 programming is, at minimum, maintained at previous levels.
- Decisions are forthcoming for school fee-related funding beyond 2017/18. That being said, the government is committed to working with school boards to ensure programming is maintained on a go-forward basis.

**7. As a result of these reductions, should we expect to see other fees increase?**

- The Minister, and the department, will be working with school boards across the province to minimize any potential increases.
- School boards are being provided with funding to help offset revenue that will be lost as a result of Bill 1.
- This offsetting funding will help ensure that school boards do not need to increase other fees to offset this specific lost revenue.
- Furthermore, as per the School Fees Regulation, school boards will require Ministerial approval of their 2017/18 fee schedules
- Should a board propose school or transportation fee increase, the Minister must be provided with a rigorous analysis and justification of such increases prior to consideration.

**8. Are charter school authorities impacted by this legislation? Why or why not?**

- No. Only public school boards, separate school boards, and Francophone school boards are impacted.
- Fees charged by charter schools may be considered in future versions of the School Fees Regulation.

**9. Are private school authorities impacted by this legislation? Why or why not?**

- No. Only public school boards, separate school boards, and Francophone school boards are impacted.
- Private schools are considered schools of choice, with parents and students opting to send their children to these schools for specialized programming.

**10. How will the department—and the public—know that these reductions are actually being realized?**

- The School Fees Regulation will include several accountability measures, including the establishment and submission of fee policies—including a fee waiver policy—and fee schedules.
- The department will monitor the school fees collected by school boards across the province to ensure that the anticipated reductions are being realized.
- Should concerns arise, they may be addressed through future amended versions of the School Fees Regulation.

Instructional Supplies and Materials:

**11. What is included in this list of restricted fees?**

- The following fees are being eliminated:
  - Textbook fees;
  - Workbook fees;
  - Photocopying and printing fees;
  - Paper fees; and
  - Common fees specifically related to instructional supplies and materials, which are charged to an entire student body or grade cohort.

**12. How do you define a “common fee”?**

- For the purposes of the School Fees Regulation, a common fee is a fee charged to an entire student body or grade cohort, and is specifically related to instructional supplies and materials.
- They are often non-descript in nature, and school boards have previously referred to such fees as—among other titles—instructional fees, instructional materials, or basic fees.

**13. How much will parents save as a result of these specific restrictions?**

- The amount parents will save as a result of Bill 1 will vary, based on several factors.
- To date, the fees charged to parents have varied greatly between school boards—and often even from school to school.
- For parents whose children attend schools that did not previously charge the fees being eliminated through Bill 1, the savings may not be as drastic compared to schools who did previously charge for these fees.
- School boards will continue to have the ability to set fees on a school-by-school basis, as local factors may have a direct impact on the level of fees that a school board charges.
- In the case parents do not see significant reductions, it may be because their school board did not charge—or charge significantly—for these fees in previous years.
- The removal of these fees will benefit the parents of nearly 600,000 students provincially.

**14. How is the purchase of bulk school supplies by school on behalf of parents impacted by Bill 1?**

- The purchase of general school supplies remains the responsibility of parents and is not impacted by Bill 1.
- If boards are performing this bulk purchasing service for parents and charging a fee, they may continue to do so on a cost-recovery basis and must clearly communicate with parents what they are receiving for this service.

Transportation:

**15. Which transportation fees are being eliminated?**

- Transportation fees can no longer be charged to students who attend their designated school and reside 2.4 kilometres or more from that school.
- The removal of these busing fees will benefit the parents of approximately 145,000 students.

**16. Why is the eligibility criteria set at 2.4 kilometres?**

- This distance criteria has been long-established in the *School Act* and the *Student Transportation Regulation*.
- This criteria is used to determine whether a board is responsible for providing transportation for the student or whether it is the parents' responsibility. For students who are less than 2.4 kilometres, it is the parents' choice on how to get their child(ren) to school.
- We recognize that this criteria is the subject of much public debate.
- Moving forward, we will engage stakeholders—including parents—in discussions regarding the suitability of this distance criteria.

**17. Which transportation fees can still be charged? Why?**

- The only transportation fee being eliminated is for students who attend their designated school and reside 2.4 kilometres or more from that school.
- This means that school boards may charge fees in other instances, including:
  - The transportation of students to a non-designated school (also referred to as a school of choice), or
  - The transportation of students who live less than 2.4 kilometres from their designated school.
- As per the *School Act*, school boards are not obligated to provide transportation to students attending a school of choice, nor students who reside less than 2.4 kilometres from their designated school.
- As school boards are not obligated to provide this service, they will retain the ability to charge transportation fees in such situations.

**18. What is a designated school?**

- All students have a designated school that is determined by the attendance area set by the resident school board.
- Designated Schools offer regular programming and are not schools of choice.
- Designated schools are usually, but not always, the closest school that offers regular programming to the residence of the student.

**19. What is classified as a “school of choice”?**

- Schools of choice are schools that are chosen because of a particular program being offered. Some examples include, language or cultural immersion programs, sports or club academies, faith based schools (offered by a non-Catholic jurisdiction), art or science schools, traditional learning centres, international baccalaureate programs and alternative programs.

**20. Why are language immersion schools classified as schools of choice? Isn't this different than previous practice?**

- All students have a designated school; parents have the choice to enrol their child in a language immersion program.
- This is not different from previous practice. Language immersion programs are a school of choice.



ALBERTA  
EDUCATION

*Office of the Minister*



MAY 18 2017

AR97265

Ms. Joy Bowen-Eyre  
Board Chair  
Calgary Board of Education  
1221 - 8 Street SW  
Calgary AB T2R 0L4

Dear Ms. Bowen-Eyre:

Thank you for your October 18, 2016 letter inviting Alberta Education to become a partner in the proposed initiative with Bullfrog Power to install solar photovoltaic panels at four Calgary Board of Education (CBE) schools. I also received your January 27, 2017 letter requesting further information about opportunities to participate in climate leadership activities.

I admire CBE's continued interest and leadership in using alternative energies at its schools, and for presenting opportunities for students to learn about the environment and the importance of reducing carbon emissions. As you are aware, I recently announced government funding to assist jurisdictions in the installation of solar panels at 36 school capital projects that are currently in the planning or design stage and have not gone to tender. Your commitment to sustainability is supported by government funds to install solar panels at four projects: James Fowler, Nelson Mandela High School Gymnasium, Lord Beaverbrook and the new high school in southeast Calgary.

Although, funding is not available to support the installation of solar photovoltaic panels or other alternative energy initiatives at other schools at this time, school jurisdictions will be informed of future funding opportunities for environmental initiatives and renewable energy installations in schools as these become available.

Our government remains dedicated to transitioning Alberta to a lower-carbon economy. Energy Efficiency Alberta is a new agency that has been created to promote and support energy efficiency and community energy systems (including micro-generation and small-scale generation) for communities, homes and businesses. Alberta's Climate Leadership Plan includes a commitment to reinvest all revenue from the carbon levy into Alberta's economy, including \$645 million over five years to Energy Efficiency Alberta.

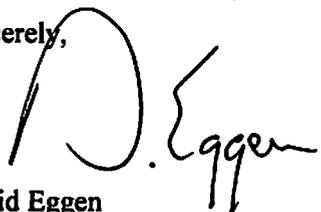
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Ms. Joy Bowen-Eyre  
Page Two

The first wave of programs is expected to launch in spring of 2017, delivering cost-effective opportunities to reduce emissions and save energy for consumers, businesses, non-profit organizations and other institutions. Programming will continue to be finalized over the course of 2017. Details about these programs and future announcements will appear on the agency's website at [www.alberta.ca/energy-efficiency-alberta.aspx](http://www.alberta.ca/energy-efficiency-alberta.aspx).

I wish you success in the completion of your school capital projects.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Eggen". The signature is written in a cursive style with a large initial "D" and a stylized "Eggen".

David Eggen  
Minister

report to  
Board of Trustees

Chief Superintendent's Update

|                             |  |
|-----------------------------|--|
| Date                        | June 13, 2017  |
| Meeting Type                | Regular Meeting, Public Agenda   |
| To                          | Board of Trustees  |
| From                        | David Stevenson,<br>Chief Superintendent of Schools                            |
| Purpose                     | Information  |
| Governance Policy Reference | Operational Expectations<br>OE-8: Communication With and Support for the Board |

1 | Recommendation

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This report is being provided for the information of the Board. No decision is required at this time.

2 | Issue

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As the Board of Trustees' chief executive officer, the Chief Superintendent is accountable for meeting the expectations set by the Board. These expectations are stated in Results and Operational Expectations policies.

OE-8: Communication With and Support for the Board requires "the Board is supported in its work and is fully and adequately informed about matters relating to Board work and significant organizational concern." With other reports submitted to the Board of Trustees, this update meets the requirement of OE-8 for the provision of information in a timely, simple and concise form.

## Records Management Quarterly Report

### BACKGROUND

At the Board of Trustees' meeting on January 24, 2012, administration was directed to provide quarterly updates to the Board regarding the Calgary Board of Education's progress to address records management and retention issues. The following is the 2016/17 3<sup>rd</sup> quarter update presented in response to this directive.

Quarterly reports reference Generally Accepted Recordkeeping Principles as a means of contextualizing the work and overall progress. The Principles are an industry standard that forms the basis for the Corporate Records Management Program. Following are the Principles of Records Management:

- Accountability
- Transparency
- Integrity
- Protection
- Compliance
- Accessibility
- Retention
- Disposition

### QUARTERLY UPDATE

#### **Principle of Compliance & Accountability**

##### **Records Management Audit**

The Records Management (RM) program timeline envisions annual audits of records management practices to gauge the progress of records management practices and maturity within the CBE.

The 2017 Records Management Audit of schools began in May. Thirteen (13) schools representing all academic divisions across all CBE Areas were selected to participate. Due to an unexpected circumstance that affected the RM Auditor, only 6 of the 13 schools audits were completed and the remaining schools audits were rescheduled for completion in June. Schools impacted were informed of the unexpected situation and were engaged with respect to rescheduling the audits.

On completion, a comprehensive Audit Report that details the audit's scope, methodology, findings and recommendations will be prepared and reviewed with the objective of advancing the CBE's Records Management practises.

##### **Benefits**

The Records Management Audit assesses compliance with Generally Accepted Record Keeping Principles® and internal policies and protocols. It also provides important insights into the effectiveness of Records Management training as well as the resources and tools that have been

provided to staff. The audit can also be useful for revealing the level of awareness that CBE staff have about elements of record classification and retention and records management in general.

Additionally, the Audit permits benchmarking and annual progress comparisons that are important for measuring program success as well as for identifying areas for improvement.

### **Status of Records Management (RM) Practices at Schools**

On March 3<sup>rd</sup> members of the RM Team met with the Deputy Chief Superintendent and Area Directors to discuss the status of RM practices at schools and to agree on actions that could be taken to improve these practises. Each Area Director received a package that comprised the 2016 School Audit Reports for schools that were audited from their Area, a high level RM Maturity Summary (by School) for their Area. In addition, the Area Directors new to the role, received guidelines that could assist them with assessing and monitoring school RM practises.

### **Benefits**

Achieving compliance with governance policies and applicable laws will require a concerted and consistent organizational effort, for which Areas Administrators and School Principals must play crucial leadership roles. In addition, developing tools to assist with the work to be undertaken in schools, as well as ensuring that Area Administrators have current information can be vital, for advancing RM maturity in schools.

## **Principles of Retention and Disposition**

### **Offsite Storage of CBE Records**

The focus on retention and disposition continued and as of the end of May 2017:

#### **Records received from schools and departments**

261 administrative and 302 student record boxes were received, classified and retained in accordance with the organization's Classification and Retention schedule.

#### **Record boxes provided to schools and departments**

1038 boxes were distributed to CBE schools and administrative offices.

#### **Off-site Disposition**

The disposition process has been initiated for 1,707 boxes of records that are eligible for destruction.

#### **On-site Active Disposition**

Using the Active Disposition process, 40 boxes of records located at schools and administrative offices were disposed.

### **OSR Folders**

74,826 regular and 3,947 oversize OSR folders have been distributed to schools.

### **Benefits**

- Provides facilities more suitable for maintaining semi-active and inactive records (primarily fire suppression, enhanced security and protective racking to shield physical boxes from damage).
- Addresses overcrowding and related occupational safety concerns at the CBE's onsite facilities.
- Reduces storage of active records by allowing the disposition of inactive, duplicate, or obsolete material.
- Record boxes provided to schools and departments provide superior protection of records during transit and resists crushing during long term storage.
- Reduces unnecessary monthly costs associated with record storage since records whose significance has passed are disposed.
- Reduces and/or eliminates ad-hoc and uncontrolled destruction of records.

### **Principles of Protection and Availability**

#### **Records requests**

Following from the previously implemented process to track record requests as a means of understanding related time, effort, and costs, during the quarter, 248 requests were received and responded to. Of these, approximately 72% represented requests from the public (including past students or on behalf of past students) and the remaining 28% were internal requests.

#### **Confidential Shred Bins**

During the quarter, records were securely disposed of throughout the CBE with the emptying of a total of 3,310 Shred Bins. To ensure adequate and efficient coverage at schools and administrative sites, RM staff members continuously monitor, adjust and adapt elements of the program to fit changing circumstances.

#### **Benefits**

The Shred Bin program adjustments have resulted in greater efficiency and satisfaction with the program. In addition, the Shred program has contributed significantly to compliance on related Operational Expectations and has helped to increase awareness of security issues with student information.

### **Principles of Integrity and Transparency**

#### **Records Management (RM) Staff Insite Update**

Information related to Records Management takes a variety of forms. To help ensure accurate and current resources are accessible to CBE staff,

the RM pages on Staff Insite were updated. Specifically, during the reporting period training videos were updated and new videos are in development.

**Onsite Training**

Site visits and Record Management consultations and training sessions were provided to the following Schools and Service Units during the reporting period:

| Onsite Training                               |                           |
|---|---------------------------|
| Cranston School                               | Harold Panabaker School   |
| Annie Gale School                             | O.S. Geiger School        |
| Colonel Irvine School                         | Balmoral School           |
| Falconridge School                            | William Roper Hull School |
| New E level Administrative Assistants Session | Alex Munro School         |

**Benefits**

In order for Records Management practises to be adopted and become standard organizational practise, they must be supported by on-going training and appropriate communications. In particular, new understandings and processes often require targeted training and specific communication to employees to build the foundations for achieving a mature RM program.

**Records Management Support**

Records Management Technicians continue to assist schools with a variety of Records Management tasks including:

- Switching old folders to the new Official Student Record (OSR) folders
- File clean-up and organization
- Preparation of record for transfer to the Records Centre
  - Sorting records based in similar retention
  - Packing records in appropriate RM Boxes
  - Completing Transmittal Forms
  - Separating and gathering records that were past their retention period
- Providing hands-on RM training as required by schools

Specifically, during the reporting period, following schools received support from the RM Technicians.

| RM Support/Assistance    |                             |
|--------------------------|-----------------------------|
| Banff Trail School       | Riverbend School            |
| Westgate School          | Queen Elizabeth High School |
| Somerset School          | Wildwood School             |
| Fish Creek School        | Olympic Heights             |
| Grant MacEwan School     | William Reid School         |
| Stanley Jones School     | Dr. E.W. Coffin School      |
| James Fowler High School | West Springs School         |
| Balmoral School          | Start Outreach              |

| RM Support/Assistance    |                        |
|--------------------------|------------------------|
| Ted Harrison School      | Colonel Irvine School  |
| Kenneth D. Taylor School | Mayland Heights School |

**Benefits**

Direct contact with Schools and School Administrative staff has resulted in much improved practices as reflected in increased awareness of and appreciation for the Records Management program. School Record inventories provide vital information for administering the Corporate Records Management Program as they contribute to mapping all the information stored at school sites which in turn are critical for locating, retrieving and managing records.



DAVID STEVENSON  
CHIEF SUPERINTENDENT OF SCHOOLS

**GLOSSARY – Developed by the Board of Trustees**

Board: Board of Trustees

Governance Culture: The Board defined its own work and how it will be carried out. These policies clearly state the expectations the Board has for individual and collective behaviour.

Board/Chief Superintendent Relationship: The Board defined in policy how authority is delegated to its only point of connection – the Chief Superintendent – and how the Chief Superintendent’s performance will be evaluated.

Operational Expectations: These policies define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.

Results: These are our statements of outcomes for each student in our district. The Results policies become the Chief Superintendent’s and the organization’s performance targets and form the basis for judging organization and Chief Superintendent performance.

## report to Board of Trustees

### Third Quarter Budget Variance Report for the 2016-17 Budget

|                             |   |
|-----------------------------|---|
| Date                        | June 13, 2017   |
| Meeting Type                | Regular Meeting, Public Agenda  |
| To                          | Board of Trustees   |
| From                        | David Stevenson,<br>Chief Superintendent of Schools   |
| Purpose                     | Decision and Information  |
| Originator                  | Brad Grundy, Superintendent, Chief Financial Officer and Corporate Treasurer                      |
| Governance Policy Reference | Operational Expectations<br>OE-5: Financial Planning<br>OE-6: Financial Administration            |
| Resource Persons            | Ed Sutlic, Director, Corporate Finance<br>Donna Rogers, Manager, Corporate Planning and Reporting |

#### 1 | Recommendations

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This report is being provided for the information of the Board. No decision is required at this time.

#### 2 | Issue

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Operational Expectations 6 – Financial Administration requires that quarterly variance reports are prepared and provide explanations for variances in excess of 1% and \$500,000. This report serves as the third quarter report for the 2016-17 fiscal year.



### 3 | Background

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Quarterly and annual reports are presented to the Board of Trustees to provide updates on the status of the results of operations. These results are compared to the fall update budget to meet the Operational Expectations 5: Financial Planning and Operational Expectations 6: Financial Administration.

Included in this report is the third quarter operating budget variance analysis, the projected use of operating reserves and designated funds (Attachment III) and capital budget variance analysis in Attachments IV and V.

### 4 | Analysis

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The First Quarter Budget Variance Report (i.e. the fall budget to the spring budget) primarily reports the budget impacts of changes in student enrolment from what was estimated during the budget preparation in the previous spring. The fall budget is adopted as the comparative budget for all subsequent budget and variance reports as it is the most accurate reflection of planned spending based on actual student enrolment.

This variance report provides projections for actual results based on current year spending trends as well as variance analysis as compared to the budget. The projection anticipates a \$22.1 million deficit; an increase of \$2.3 million. This is the net result of increased spending on both certificated and non-certificated staff, an increase in services, contracts and supplies offset by favorable variances in revenues.

Attachment I summarizes the forecasted changes to the budgeted revenues and expenses, reserve and designated fund transfers and capital transactions. Explanations have been provided for variances above 1% and \$500,000 of reported line items in accordance with Operational Expectations 6. This includes:

#### REVENUES

- A favourable variance in *Federal Government and First Nations* revenue of \$0.6 million is the result of the Federal Government increasing support to the LINC (Language Instruction for New Canadians) program. The favourable variance in revenues is offset with corresponding unfavourable spending.
- A favourable variance in *other sales and services* revenue of \$0.8 million is the result of favourable sales activity at schools. These favourable variances are offset by corresponding unfavourable spending.
- A favourable variance in *all other revenue* of \$2.2 million is the result of higher than anticipated gifts and donation revenue as well as grant revenue. These increased revenues are offset by corresponding increased spending.



## EXPENSES

- A net unfavourable variance of \$4.2 million in *Certificated salaries and benefits* due to:
  - \$5 million unfavourable variance in certificated salaries and benefits in schools as a result of incurring higher staffing costs from principal deployment decisions and offset by reduced spending in services, supplies and contracts.
  - \$0.8 million favourable variance in certificated permanent salaries and benefits as a result of savings from vacancies in service units.
  
- A net unfavourable variance of \$1.2 million in *Non-certificated staff expenses* due to:
  - \$3.1 million unfavourable variance in non-certificated salaries and benefits at the school level as a result of overtime, increased temporary support staff and principal deployment decisions and offset by reduced spending in services, supplies and contracts.
  - \$1.9 million favourable variance in non-certificated salaries and benefits as a result of savings from vacancies in service units.
  
- A net \$2.4 million unfavourable variance for *Services, contracts and supplies* expenses includes:
  - \$1.4 million unfavourable variance in projects which are offset by favourable variances in revenues.
  - \$1.3 million unfavourable variance in other service unit expenses comprised primarily of additional supplies, rental costs for the physical education program at Nelson Mandela High School and repairs and maintenance.
  - \$0.3 million unfavourable variance from carbon tax impacts.
  - \$1.2 million unfavourable variance for new regular bus routes.
  - \$2.8 million unfavourable variance for 51 one-time bus routes in support of the school-within-a-school model for new schools.
  - \$3.0 million unfavourable variance from complex transportation needs.
  - \$4.9 million favourable variance for school services, contracts and supplies which will be redeployed to offset the favourable salary variances discussed above, related to principal deployment decisions.
  - \$2.7 million in favourable savings including rebates, utilities and other cost cutting measures across service units.

Attachment II provides a breakdown of projected spending in schools and service units with a variance analysis against the budget.

### OPERATING DEFICIT

The forecasted deficit is \$22.1 million; \$2.3 million higher than what was anticipated in the budget (which is equivalent to 0.2% of total expenditures). The increased deficit is the result of the variances explained above.

### USE OF RESERVES

The anticipated *Available for use reserves* of \$19.3 million (Attachment III) represents 1.4 per cent of total revenue which is not a significant reserve value considering that we spend \$7.5 million per instructional day. Current anticipated reserve levels are approximately two and a half days.



## CAPITAL ACTIVITIES

The 2016-17 third quarter capital budget status reports (Attachments IV and V) highlight variances between the current approved budget and estimated capital expenditures for the year ended August 31, 2017. Overall capital spending is forecast to be \$12.7 million less than budgeted, ending the 2016-17 year with \$50.7 million in capital spending. This is generally the result of deferring project activity to 2017-18 or a reduction in project scope.

## 5 | Financial Impact

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The forecast anticipates the use of \$22 million operating reserves and \$19.7 million capital reserves to maintain a balanced position. There are changes in anticipated draws on reserves from what was initially planned as the projected deficit has changed.

## 6 | Conclusion

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This report represents information to the Board of Trustees in connection with Operational Expectations 5: Financial Planning and Operational Expectations 6: Financial Administration.

In response to the economic conditions within Alberta, and the anticipated financial challenges that will be faced by the Government and subsequently passed on to Alberta Education and the CBE, we must pay particular attention to our financial management.

Cost containment measures have been implemented while maintaining focus on our core values of; students come first, learning is our central purpose and public education serves the common good. We have always practiced careful financial decision making and will be scrutinizing our operations to identify areas where additional cost cutting measures may be implemented without impacting student learning.



DAVID STEVENSON  
CHIEF SUPERINTENDENT OF SCHOOLS

### Attachments

- Attachment I: 2016-17 third quarter operating budget variance analysis
- Attachment II: 2016-17 third quarter expense budget variance analysis by service unit
- Attachment III: 2016-17 third quarter use of operating reserves and designated funds
- Attachment IV: 2016-17 third quarter capital budget status report, summary of board funded capital investments
- Attachment V: 2016-17 third quarter capital budget status report – projects funded by the Province of Alberta

### GLOSSARY – Developed by the Board of Trustees

Board: Board of Trustees

Governance Culture: The Board defined its own work and how it will be carried out. These policies clearly state the expectations the Board has for individual and collective behaviour.



Board/Chief Superintendent Relationship: The Board defined in policy how authority is delegated to its only point of connection – the Chief Superintendent – and how the Chief Superintendent's performance will be evaluated.

Operational Expectations: These policies define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.

Results: These are our statements of outcomes for each student in our district. The Results policies become the Chief Superintendent's and the organization's performance targets and form the basis for judging organization and Chief Superintendent Performance.



Attachment I: 2016-17 third quarter operating budget variance analysis

CALGARY BOARD OF EDUCATION  
Q3 BUDGET VARIANCE REPORT  
(in \$ thousands)

| Description   | 2016-17<br>Fall Update<br>Budget <sup>(A)</sup> | Forecast for the<br>year ended Aug<br>31, 2017 | Variance Favourable/<br>(Unfavourable) |                |
|---|---|--|--|----------------|
| <b>Revenues</b>   |   |  |  |                |
| Alberta Education   | 1,230,690                                       | 1,231,715                                      | 1,025                                  | 0.1%           |
| Other - Government of Alberta                             | 618   | 558  | (60)                                   | (9.7)%         |
| Federal Government and First Nations                      | 2,650   | 3,207  | 557                                    | 21.0%          |
| Other sales and services                                  | 19,360  | 20,153   | 793                                    | 4.1%           |
| Fees  | 51,456  | 51,947   | 491                                    | 1.0%           |
| Investment income   | 3,345   | 3,768  | 423                                    | 12.6%          |
| All other revenues  | 22,853  | 25,087   | 2,234                                  | 9.8%           |
| <b>Total revenues</b>                                     | <b>1,330,972</b>                                | <b>1,336,435</b>                               | <b>5,463</b>                           | <b>0.4%</b>    |
| <b>Expenses</b>   |   |  |  |                |
| Certificated salaries and benefits                        | 775,314   | 779,544  | (4,230)                                | (0.5)%         |
| Non-certificated salaries and benefits                    | 262,679   | 263,867  | (1,188)                                | (0.5)%         |
| Services, contracts and supplies                          | 247,869   | 250,226  | (2,357)                                | (1.0)%         |
| Amortization  | 57,370  | 57,370   | -                                      | 0.0%           |
| Interest  | 2,123   | 2,072  | 51                                     | 2.4%           |
| All other expensess                                       | 5,443   | 5,443  | -                                      | 0.0%           |
| <b>Total expenses</b>                                     | <b>1,350,798</b>                                | <b>1,358,522</b>                               | <b>(7,724)</b>                         | <b>(0.6)%</b>  |
| <b>Deficit</b>  | <b>(19,826)</b>                                 | <b>(22,087)</b>                                | <b>(2,261)</b>                         | <b>(11.4)%</b> |
| <b>Transfer from operating reserves/designated funds</b>  |   |  |  |                |
| Transfer from operating reserves                          | 26,126  | 21,973   | (4,153)                                | (15.9)%        |
| Transfer from designated funds - service units            | 1,052   | 1,052  | -                                      | 0.0%           |
| Transfer from designated funds - schools                  | 5,862   | 5,862  | -                                      | 0.0%           |
|   | <b>33,040</b>                                   | <b>28,887</b>                                  | <b>(4,153)</b>                         | <b>(12.6)%</b> |
| <b>Add/(deduct) capital items paid by operating funds</b> |   |  |  |                |
| Capital assets acquired                                   | (59,625)  | (46,909)                                       | 12,716                                 | (21.3)%        |
| Capital asset amortization                                | 24,229  | 24,229   | -                                      | 0.0%           |
| Debt repayments   | (3,765)   | (3,765)  | -                                      | 0.0%           |
| Transfer from capital carry forwards and reserves         | 25,947  | 19,645   | (6,302)                                | (24.3)%        |
|   | <b>(13,214)</b>                                 | <b>(6,800)</b>                                 | <b>6,414</b>                           | <b>48.5%</b>   |
| <b>Net operating surplus</b>                              |   |  |  |                |
|   | -   | -  | -                                      | 0.0%           |

<sup>A)</sup> Approved by the Board of Trustees on November 29, 2016. Some numbers have been reclassified for comparative purposes.

## Attachment II: 2016-17 third quarter expense budget variance analysis by service unit

The following table provides additional information as to the planned spending of schools and service units. Expense and FTE details are provided by major expense category and operating unit:

| 2016-17 Forecast  |                  |                              |               |                                       |              |                 |                                 |                 |                     |                   |                  |
|---|------------------|------------------------------|---------------|---------------------------------------|--------------|-----------------|---------------------------------|-----------------|---------------------|-------------------|------------------|
|   | Schools & Areas  | Service Unit System Accounts | Learning      | Facilities and Environmental Services | Legal        | Communi-cations | Finance and Technology Services | Human Resources | Chief Supt's Office | Board of Trustees | Total            |
| <b>FTEs by:</b>   |                  |                              |               |                                       |              |                 |                                 |                 |                     |                   |                  |
| Superintendent  | -                | -                            | 1             | 1                                     | 1            | 1               | 1                               | -               | 2                   | -                 | 7                |
| Staff (incl ATA, Staff Assn, CUPE, trades)                | 9,079            | 54                           | 219           | 193                                   | 3            | 11              | 147                             | 46              | 1                   | -                 | 9,753            |
| Exempt Staff  | 7                | 0                            | 24            | 68                                    | 10           | 10              | 47                              | 43              | 2                   | -                 | 211              |
| <b>Total FTEs</b>   | <b>9,086</b>     | <b>54</b>                    | <b>244</b>    | <b>262</b>                            | <b>14</b>    | <b>22</b>       | <b>195</b>                      | <b>89</b>       | <b>5</b>            | <b>-</b>          | <b>9,971</b>     |
| <b>2016-17 Forecast</b>                                   |                  |                              |               |                                       |              |                 |                                 |                 |                     |                   |                  |
| Salaries and benefits                                     | 933,328          | 12,002                       | 33,428        | 24,321                                | 1,667        | 2,515           | 24,440                          | 10,361          | 931                 | 418               | 1,043,411        |
| Supplies and services                                     | 89,720           | 127,977                      | 5,658         | 22,629                                | 122          | 152             | 1,566                           | 1,243           | 286                 | 873               | 250,226          |
| Other (interest, amortization and uncollectible accounts) | 43               | 57,140                       | 1,038         | 3,325                                 | 15           | -               | 3,302                           | 20              | 2                   | -                 | 64,885           |
|   | <b>1,023,091</b> | <b>197,119</b>               | <b>40,124</b> | <b>50,275</b>                         | <b>1,804</b> | <b>2,667</b>    | <b>29,308</b>                   | <b>11,624</b>   | <b>1,219</b>        | <b>1,291</b>      | <b>1,358,522</b> |
| 2016-17 Fall Update                                       | 1,020,794        | 190,021                      | 39,162        | 51,476                                | 2,082        | 2,726           | 29,478                          | 12,549          | 1,219               | 1,291             | 1,350,798        |
| Unfavourable/(favourable) <sup>(1)</sup>                  | 2,297            | 7,098                        | 962           | (1,201)                               | (278)        | (59)            | (170)                           | (925)           | -                   | -                 | 7,724            |
|   | (a)              | (b)                          | (c)           | (d)                                   | (e)          | (f)             | (g)                             | (h)             | (i)                 | (j)               |                  |

### <sup>(1)</sup> Variances explanations

<sup>(a)</sup> Schools and Areas net expenses increased \$2.3 million, and is offset by tax receipted donations, school generated funds and commissioning budget dollars for new schools.

<sup>(b)</sup> Service Unit System Accounts have increased as a result of a forecasted increases related to delayed school openings, bus route configuration, and complex transportation needs.

<sup>(c)</sup> Learning has projected increases with offsetting targeted revenues, they are forecasting a \$1.1 million overall positive variance compared to budget as a result of overall spending reduction in the service unit.

<sup>(d)</sup> Facilities and Environmental Services projects savings related to position vacancies \$1.7 million offset by increased estimated cost of supplies \$0.5 million.

<sup>(e)</sup> Legal services projects a favourable variance in non-certificated and certificated salaries

<sup>(f)</sup> Communications has vacancies in non-certificated salaries.

<sup>(g)</sup> Finance/Technology Services projects a favourable variance in non-certificated salaries offset by increased equipment costs and folders for student records.

<sup>(h)</sup> Human Resources projects a favourable variance in salaries and benefits due to vacancies in certificated and non-certificated positions.

<sup>(i)</sup> Chief Supt's Office has no variances as of Q3.

<sup>(j)</sup> Board of Trustees has no variances as of Q3.

Attachment III: 2016-17 third quarter use of operating reserves and designated funds

**CALGARY BOARD OF EDUCATION  
2016-17 FORECASTED USE OF OPERATING RESERVES**

| <u>Description</u>                                   | Reserve<br>Balance<br>Sept 1, 2016 | 2016-17<br>Fall Update<br>use of<br>Reserves <sup>1</sup> | 2016-17<br>Forecast Use<br>of Reserves | Forecasted<br>Reserve<br>Balance<br>Aug 31, 2017 | 2017-18<br>Forecasted<br>Use of<br>Reserves |
|--|------------------------------------|---|--|--|---|
| <b>Accumulated operating reserves</b>                |                                    |   |  |  |   |
| Available for use                                    | 41,241                             | (26,126)  | (21,973)                               | 19,268   | (5,000)                                     |
| <b>Restricted reserves</b>                           |                                    |   |  |  |   |
| EducationMatters flow-through funds <sup>(2)</sup>   | 1,812                              | -   | -                                      | 1,812  | -   |
| Changes in accounting policy reserve                 | (10,164)                           | -   | -                                      | (10,164)   | -   |
| <b>Total restricted reserves</b>                     | <b>(8,352)</b>                     | <b>-</b>  | <b>-</b>                               | <b>(8,352)</b>                                   | <b>-</b>                                    |
| <b>Designated funds</b>                              |                                    |   |  |  |   |
| School decentralized budgets                         | 5,862                              | (5,862)   | (5,862)                                | -  | -   |
| Instructional and service unit initiatives           | 1,052                              | (1,052)   | (1,052)                                | -  | -   |
| <b>Total designated funds</b>                        | <b>6,914</b>                       | <b>(6,914)</b>  | <b>(6,914)</b>                         | <b>-</b>   | <b>-</b>                                    |
| <b>Total operating reserves and designated funds</b> | <b>39,803</b>                      | <b>(33,040)</b>   | <b>(28,887)</b>                        | <b>10,916</b>                                    | <b>(5,000)</b>                              |
| <b>Capital reserves</b>                              |                                    |   |  |  |   |
| Building reserve                                     | 9,019                              | (2,200)   | -                                      | 9,019  | (4,760)                                     |
| Other capital reserves <sup>(3)</sup>                | 29,401                             | (23,747)  | (19,645)                               | 9,756  | -   |
| Plant, operations and maintenance asset replacement  | 798                                | -   | -                                      | 798  | -   |
| <b>Total capital reserves</b>                        | <b>39,218</b>                      | <b>(25,947)</b>   | <b>(19,645)</b>                        | <b>19,573</b>                                    | <b>(4,760)</b>                              |
| <b>Total reserves</b>                                | <b>79,021</b>                      | <b>(58,987)</b>   | <b>(48,532)</b>                        | <b>30,489</b>                                    | <b>(9,760)</b>                              |

(1) Approved by the Board of Trustees on November 29, 2016.

(2) This reserve is the result of consolidating EducationMatters into the CBE's financial statements in accordance with accounting standards.

(3) Included in other capital reserves is \$23.7 million in designated capital funds, which are capital funds carried forward for projects that were in progress and will continue into 2016-17. The remaining balance includes reserves designated for capital lease support, school program modernization and relocation.

Attachment IV: 2016-17 third quarter capital budget status report,  
summary of board funded capital investments

|  | 2016-17<br>Fall Update<br>Budget | Actual<br>Costs<br>to April<br>30, 2017 | Total<br>Forecast | Variance<br>Favorable /<br>(Unfavorable) |            | Variance<br>>1% |
|--|----------------------------------|---|-------------------|--|------------|-----------------|
|  | (000)                            |   | (000)             | (\$)                                     | %          | Note            |
| <b>Capital Lease Payments</b>                  |                                  |   |                   |  |            |                 |
| Performance Contracts                          | 3,765                            | -                                       | 3,765             | -  | -          |                 |
| <b>Total Capital Lease Payments</b>            | <b>3,765</b>                     | <b>-</b>                                | <b>3,765</b>      | <b>-</b>                                 | <b>-</b>   |                 |
| <b>NAI Related Projects</b>                    |                                  |   |                   |  |            |                 |
| Strategic                                      | 9,125                            | 1,872                                   | 4,275             | 4,850                                    | 53%        | (1)             |
| Enhancement                                    | 5,962                            | 1,734                                   | 5,435             | 527                                      | 9%         | (2)             |
| Maintenance                                    | 23,330                           | 8,868                                   | 16,190            | 7,140                                    | 31%        | (3)             |
| <b>Total NAI Related Projects</b>              | <b>38,417</b>                    | <b>12,474</b>                           | <b>25,900</b>     | <b>12,517</b>                            | <b>93%</b> |                 |
| <b>School Enhancements</b>                     | <b>1,632</b>                     | <b>660</b>                              | <b>951</b>        | <b>681</b>                               | <b>42%</b> | <b>(4)</b>      |
| <b>Reserve Projects</b>                        |                                  |   |                   |  |            |                 |
| CTS/CTF Upgrades                               | 3,125                            | 403                                     | 1,303             | 1,822                                    | 58%        | (5)             |
| New School Construction not funded by Province | -                                | 1,737                                   | 4,470             | (4,470)                                  | 100%       | (6)             |
| Nelson Mandela HS (CTS Commissioning)          | 1,520                            | 355                                     | 1,520             | -  | 0%         |                 |
| Nelson Mandela HS Gym                          | 2,200                            | 55                                      | -                 | 2,200                                    | 100%       | (7)             |
| New School Commissioning                       | 12,083                           | 3,586                                   | 12,083            | -  | 0%         |                 |
| Air Conditioning for P3 Modulares              | -                                | -                                       | 655               | (655)                                    | 100%       | (8)             |
| Forest Lawn Welding Shop                       | 648                              | 15                                      | 27                | 621                                      | 96%        | (9)             |
| <b>Total Reserve Projects</b>                  | <b>19,576</b>                    | <b>6,151</b>                            | <b>20,058</b>     | <b>(482)</b>                             | <b>-2%</b> |                 |
| <b>Total Capital Expenditures</b>              | <b>63,390</b>                    | <b>19,285</b>                           | <b>50,674</b>     | <b>12,716</b>                            | <b>20%</b> |                 |

**Financed by the Following:**

|   |               |          |               |
|---|---------------|----------|---------------|
| Contribution from/(to) operating activities | 13,214        | -        | 6,800         |
| Total Amortization Expense (non-cash)       | 24,229        | -        | 24,229        |
| Designated Capital Funds                    | 23,747        | -        | 19,645        |
| Capital Reserves                            | 2,200         | -        | -             |
| <b>Total Non-Facility Capital Financing</b> | <b>63,390</b> | <b>-</b> | <b>50,674</b> |

**Definitions:**

Strategic - Projects that open up new horizons, learning methods, organization models, and value propositions that cut across the organization or physical facility.

Enhancement - Projects that improve or extend the functionality of existing systems, technologies, and processes.

Maintenance - Projects that are required to maintain current systems and keep them in good working condition.

**Variance Explanation >1% and \$500,000**

- (1) \$4.8 million strategic projects: Variance for the Student Information System project is projected resulting from timing changes.
- (2) \$0.5 million enhancement projects: is the result of projects that are delayed and are expected to continue into 2017-18.
- (3) \$7.1 million in upgrades to educational spaces to meet program requirements have been moved under IMR funding to make budget available for new school construction costs that the Province has indicated they will only consider upon Statement of Final Costs.
- (4) \$0.7 million allocation to support additional school enhancement projects.
- (5) \$1.8 million variance due to a reduction in scope of work for the CTS project.
- (6) \$4.47 million unfavourable variance – See note (3).
- (7) \$2.2 million favourable variance for Nelson Mandela School in 2016-17 as the work will be completed in 2017-18.
- (8) \$0.6 million unfavourable variance due to costs required for air conditioning for modulares.
- (9) \$0.6 million favourable variance for welding shop at Forest Lawn School due to alternate funding source.

Attachment V: 2016-17 third quarter capital budget status report – projects funded by the Province of Alberta

|  | Total Approved Budget | Expenditures April 30, 2017 | Estimated Add Expenditures to Project End | Estimated Total Capital Expenditure | Estimated Forecast Variance |
|--|-----------------------|-----------------------------|---|-------------------------------------|-----------------------------|
| (in thousands)                                     |                       |                             |   |                                     |                             |
| <b>September 2016 Schools</b>                      |                       |                             |   |                                     |                             |
| Auburn Bay School                                  | 13,483                | 14,946                      | (497)                                     | 14,449                              | (966)                       |
| Copperfield School                                 | 15,367                | 16,776                      | (478)                                     | 16,299                              | (932)                       |
| Kenneth Taylor School                              | 13,456                | 14,790                      | (485)                                     | 14,305                              | (849)                       |
| Buffalo Rubbing Stone School                       | 13,322                | 15,182                      | (812)                                     | 14,370                              | (1,048)                     |
| New Brighton School                                | 15,522                | 16,545                      | (461)                                     | 16,084                              | (562)                       |
| <b>Sub-total Elementary Schools</b>                | <b>\$ 71,150</b>      | <b>78,240</b>               | <b>(2,733)</b>                            | <b>75,507</b>                       | <b>(4,357)</b>              |
| Peter Lougheed School MS                           | 19,876                | 20,168                      | (663)                                     | 19,505                              | 371                         |
| William D. Pratt School MS                         | 20,328                | 20,889                      | (676)                                     | 20,213                              | 115                         |
| <b>Sub-total Middle Schools</b>                    | <b>\$ 40,204</b>      | <b>41,057</b>               | <b>(1,339)</b>                            | <b>39,718</b>                       | <b>486</b>                  |
| Bowness High - Modernization                       | 18,019                | 18,117                      | (98)                                      | 18,019                              | -                           |
| Jack James High - Modernization                    | 12,161                | 11,385                      | 776                                       | 12,161                              | -                           |
| <b>Sub-total High School</b>                       | <b>\$ 30,180</b>      | <b>29,502</b>               | <b>678</b>                                | <b>30,180</b>                       | <b>-</b>                    |
| <b>Winter 2017 Schools</b>                         |                       |                             |   |                                     |                             |
| Eric Harvie School                                 | 12,594                | 14,658                      | (406)                                     | 14,252                              | (1,658)                     |
| Harold W. Riley (Aboriginal Learning Center)       | 11,003                | 11,210                      | (406)                                     | 10,804                              | 199                         |
| Hugh A. Bennet School ES                           | 14,195                | 14,009                      | 186                                       | 14,195                              | -                           |
| Dr. Roberta Bondar School ES                       | 13,681                | 14,205                      | (406)                                     | 13,799                              | (118)                       |
| Elbow Park School                                  | 10,100                | 22,081                      | (10,711)                                  | 11,370                              | (1,270)                     |
| <b>Sub-total Elementary Schools</b>                | <b>\$ 61,573</b>      | <b>76,163</b>               | <b>(11,743)</b>                           | <b>64,420</b>                       | <b>(2,847)</b>              |
| Dr. George Stanley MS                              | 21,321                | 22,081                      | (406)                                     | 21,675                              | (354)                       |
| West Ridge MS                                      | 20,691                | 22,229                      | (406)                                     | 21,823                              | (1,132)                     |
| Dr. Martha Cohen School                            | 21,826                | 19,120                      | 2,706                                     | 21,826                              | -                           |
| McKenzie highlands School MS                       | 22,789                | 21,244                      | 1,545                                     | 22,789                              | -                           |
| <b>Sub-total Middle Schools</b>                    | <b>\$ 86,627</b>      | <b>84,674</b>               | <b>3,439</b>                              | <b>88,113</b>                       | <b>(1,486)</b>              |
| Christine Meikle School - Replacement              | 14,745                | 16,406                      | -   | 16,406                              | (1,661)                     |
| <b>Sub-total High School</b>                       | <b>\$ 14,745</b>      | <b>16,406</b>               | <b>-</b>                                  | <b>16,406</b>                       | <b>(1,661)</b>              |
| <b>September 2017 Schools</b>                      |                       |                             |   |                                     |                             |
| Manmeet Singh Bhuller ES                           | 13,557                | 9,090                       | 4,467                                     | 13,557                              | -                           |
| Ron Southern School ES                             | 14,329                | 6,280                       | 8,049                                     | 14,329                              | -                           |
| <b>Sub-total Elementary Schools</b>                | <b>27,886</b>         | <b>15,370</b>               | <b>12,516</b>                             | <b>27,886</b>                       | <b>-</b>                    |
| Griffith Woods K-9                                 | 25,117                | 7,044                       | 18,073                                    | 25,117                              | -                           |
| Marshall Springs School MS                         | 22,772                | 16,847                      | 5,925                                     | 22,772                              | -                           |
| <b>Sub-total Middle Schools</b>                    | <b>47,889</b>         | <b>23,891</b>               | <b>23,998</b>                             | <b>47,889</b>                       | <b>-</b>                    |
| James Fowler High - Modernization                  | 17,706                | 1,858                       | 15,848                                    | 17,706                              | -                           |
| Lord Beaverbrook High - Modernization              | 27,098                | 1,458                       | 25,640                                    | 27,098                              | -                           |
| <b>Sub-total High School</b>                       | <b>\$ 44,804</b>      | <b>3,316</b>                | <b>41,488</b>                             | <b>44,804</b>                       | <b>-</b>                    |
| <b>September 2018 Schools</b>                      |                       |                             |   |                                     |                             |
| Seton High School                                  | 55,996                | 5,656                       | 50,340                                    | 55,996                              | -                           |
| <b>Sub-total High School</b>                       | <b>\$ 55,996</b>      | <b>5,656</b>                | <b>50,340</b>                             | <b>55,996</b>                       | <b>-</b>                    |
| <b>Portables</b>                                   |                       |                             |   |                                     |                             |
| 2015-2016  | 1,693                 | 1,928                       | -   | 1,928                               | (235)                       |
| 2016-2017  | 2,473                 | 2,998                       | (125)                                     | 2,873                               | (400)                       |
| <b>Total Portables</b>                             | <b>\$ 4,166</b>       | <b>4,926</b>                | <b>(125)</b>                              | <b>4,801</b>                        | <b>(635)</b>                |
| <b>Total Capital - Funded by Alberta Education</b> | <b>\$ 485,220</b>     | <b>379,201</b>              | <b>116,519</b>                            | <b>495,721</b>                      | <b>(10,500)</b>             |



## report to Board of Trustees

## Construction Projects Status Report

|                             |   |
|-----------------------------|---|
| Date                        | June 13, 2017   |
| Meeting Type                | Regular Meeting, Public Agenda  |
| To                          | Board of Trustees   |
| From                        | David Stevenson<br>Chief Superintendent of Schools  |
| Purpose                     | Information   |
| Originator                  | Dany Breton, Superintendent, Facilities and Environmental Services  |
| Governance Policy Reference | Operational Expectations<br>OE-8: Communication With and Support for the Board<br>OE-12: Facilities       |
| Resource Person(s)          | Eugene Heeger, Director, Design & Property Development<br>Leah Hartley, Project Manager, Capital Projects |

### 1 | Recommendation

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It is recommended:

- This report is being provided for information for the Board. No decision is required at this time.

### 2 | Issue

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The Chief Superintendent is required to provide the Board of Trustees with an update regarding the status of new and replacement facilities under development or construction.



### 3 | Background

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The Calgary Board of Education (CBE) is currently undertaking 7 new school construction and modernization projects. Another four new schools are forecasted to open in the 2017-18 school year. One new high school and two high school modernizations are anticipated for the 2018-19 school year.

On March 21, 2017, the Alberta Government announced the approval of three new elementary schools for Cranston, Evergreen and Coventry Hills, as well as a major modernization for Forest Lawn High School.

On April 12, 2017, the Alberta Government advised that at the CBE's request, the three new elementary schools would be managed by Alberta Infrastructure, and that the Forest Lawn High School Modernization would be Grant Funded and managed by the CBE.

### 4 | Analysis

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Information on the current status of the projects under development and being administered by the CBE and Alberta Infrastructure is provided in **Attachment I**.

The locations of the various new school and modernization capital projects under development are shown in **Attachment II**.

There are six Project Steering Committees setup for the current school projects as follows:

- Marshall Springs MS
- Griffith Woods K-9 (Bundle 10)
- Manmeet Singh Bhullar and Ron Southern ES (Bundle 11)
- Seton HS
- James Fowler HS Modernization
- Lord Beaverbrook HS Modernization

#### Modular Classrooms

Two modular units from the Earl Grey School site have been assigned for installation at Rosedale School for September 2017.

## 5 | Conclusion

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This report provides the current update on the status of new and modernized facilities under development or construction by the CBE.

It is provided to the Board of Trustees as monitoring information in compliance with Operational Expectation 8: Communication With and Support for the Board.



DAVID STEVENSON  
CHIEF SUPERINTENDENT OF SCHOOLS

### ATTACHMENTS

Attachment I: New/Modernized Facilities Construction Status  
Attachment II: Project Location Map  
Attachment III: Project Photos

### GLOSSARY – Developed by the Board of Trustees

Board: Board of Trustees

Governance Culture: The Board defined its own work and how it will be carried out. These policies clearly state the expectations the Board has for individual and collective behaviour.

Board/Chief Superintendent Relationship: The Board defined in policy how authority is delegated to its only point of connection – the Chief Superintendent – and how the Chief Superintendent's performance will be evaluated.

Operational Expectations: These policies define both the nonnegotiable expectations and the clear boundaries within which the Chief Superintendent and staff must operate. They articulate the actions and decisions the Board would find either absolutely necessary or totally unacceptable.

Results: These are our statements of outcomes for each student in our district. The Results policies become the Chief Superintendent's and the organization's performance targets and form the basis for judging organization and Chief Superintendent's performance.

**CALGARY BOARD OF EDUCATION  
NEW/MODERNIZED FACILITY CONSTRUCTION STATUS  
June 2017**

| Building   | Opening Date | Notes/Comments   |      |
|--|--------------|--|------|
| 2. Innovation Centre / Academy<br>(Booth Centre)<br>(Chinook Learning Services)<br>Capacity 675 students | TBD          | Land Use Amendment   | 100% |
|  |              | Expression of Interest Document  | 100% |
|  |              | Concept Design   | 20%  |
|  |              | Design and Specifications  | 0%   |
|  |              | City Permits   | 0%   |
|  |              | Note: Alberta Education has requested that this project be placed on hold.                     |      |
| 8. (b) Nelson Mandela High School<br>(Northeast High School)<br>Gymnasium                                | Fall-17      | City Permits   | 100% |
|  |              | Construction Award   | 0%   |
|  |              | Foundations  | 0%   |
|  |              | Steel Fabrication and Erection   | 0%   |
|  |              | Roofing and Membranes  | 0%   |
|  |              | Building Envelope  | 0%   |
|  |              | Interior Finishes  | 0%   |
| Note: Being tendered.  |              |  |      |
| 13. Marshall Springs School<br>(Evergreen School)<br>Grades 4 - 9<br>Capacity 900 students               | Sep-17       | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Foundations  | 100% |
|  |              | Steel Fabrication and Erection   | 100% |
|  |              | Roofing and Membranes  | 100% |
|  |              | Building Envelope  | 100% |
|  |              | Interior Finishes  | 95%  |
| Note: The contractor is indicating a minor delay. This will not affect Occupancy.                        |              |  |      |
| 20. Rideau Park School<br>(Flood mitigation)   | TBC          | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 0%   |
|  |              | Note: Reassessment of scope required as tenders are over budget. Project commencement at risk. |      |
| 26. Southeast High School<br>Grades 10 -12<br>Capacity 1800 students                                     | Fall-18      | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Foundations  | 100% |
|  |              | Steel Fabrication and Erection   | 40%  |
|  |              | Roofing and Membranes  | 0%   |
|  |              | Building Envelope  | 0%   |
|  |              | Interior Finishes  | 0%   |

**CALGARY BOARD OF EDUCATION  
NEW/MODERNIZED FACILITY CONSTRUCTION STATUS  
June 2017**

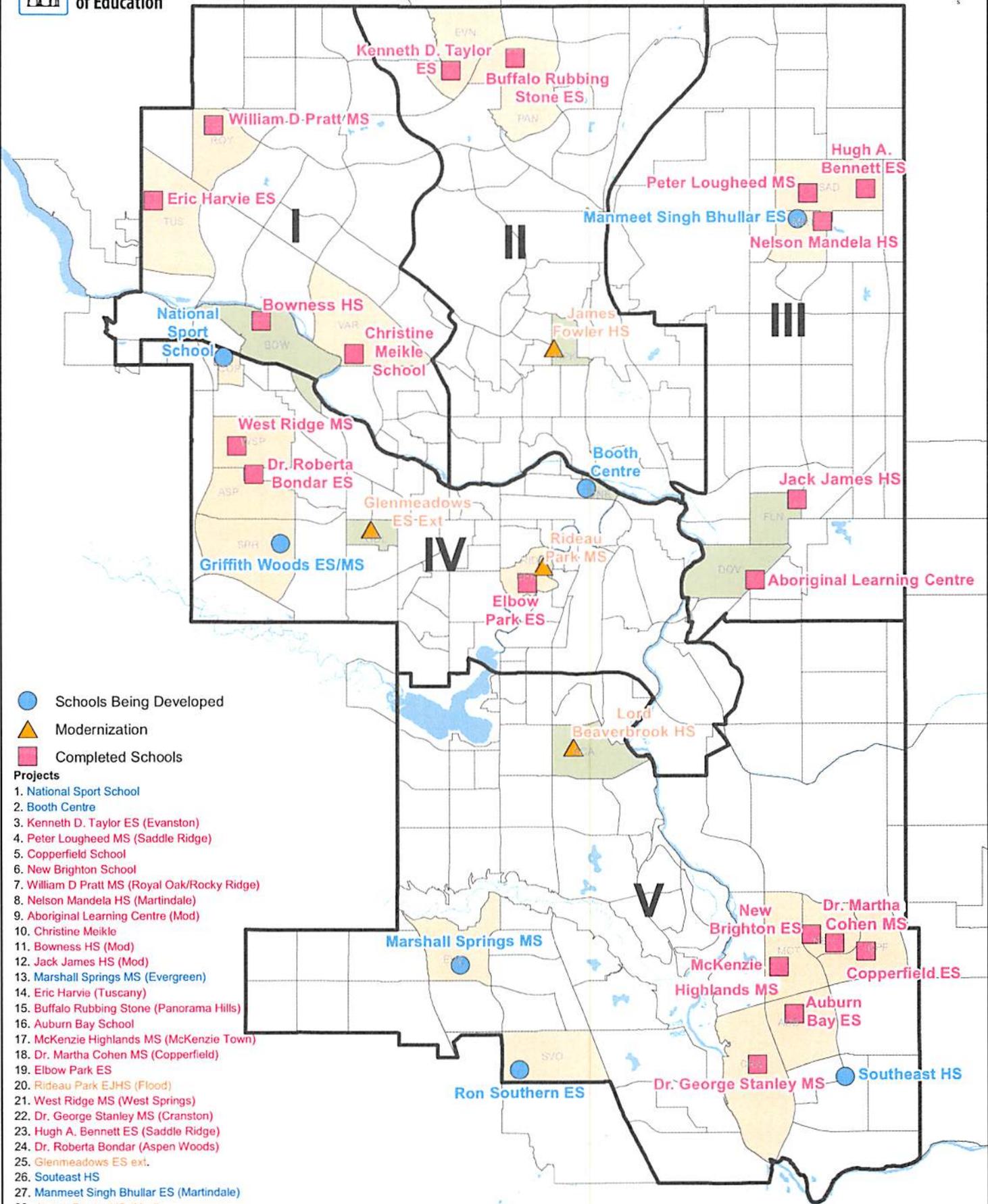
| Building   | Opening Date | Notes/Comments   |      |
|--|--------------|--|------|
| 27. Manmeet Singh Bhullar School<br>(Martindale School)<br>Grades K-5<br>Capacity 600 students                   | Fall-17      | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Foundations  | 100% |
|  |              | Steel Fabrication and Erection   | 100% |
|  |              | Roofing and Membranes  | 100% |
|  |              | Building Envelope  | 85%  |
|  |              | Interior Finishes  | 50%  |
| 28. James Fowler High School<br>Modernization  | Fall-18      | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Tender to subtrades  | 100% |
|  |              | Award to subtrades   | 100% |
|  |              | Construction Progress  | 10%  |
|  |              | Note: Planning of work sequencing continues to align with operational constraints. |      |
| 29. Griffith Woods School<br>(Springbank Hill/<br>Discovery Ridge School)<br>Grades K-9<br>Capacity 900 students | Winter-18    | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Foundations  | 100% |
|  |              | Steel Fabrication and Erection   | 100% |
|  |              | Roofing and Membranes  | 90%  |
|  |              | Building Envelope  | 50%  |
|  |              | Interior Finishes  | 15%  |
| Note: Project tracking behind schedule. Opening date revised to January 2018.                                    |              |  |      |
| 30. Lord Beaverbrook<br>High School<br>Modernization   | Fall-18      | Design and Specifications  | 100% |
|  |              | City Permits   | 100% |
|  |              | Construction Award   | 100% |
|  |              | Tender to subtrades  | 100% |
|  |              | Award to subtrades   | 100% |
|  |              | Construction Progress  | 15%  |
|  |              | Note: Planning of work sequencing continues to align with operational constraints. |      |

**CALGARY BOARD OF EDUCATION  
NEW/MODERNIZED FACILITY CONSTRUCTION STATUS  
June 2017**

| Building   | Opening Date | Notes/Comments  |      |
|--|--------------|---|------|
| 31. Ron Southern School<br>(Silverado School)<br>Grades K-4<br>Capacity 600 students | Fall-17      | Design and Specifications   | 100% |
|  |              | City Permits  | 100% |
|  |              | Construction Award  | 100% |
|  |              | Foundations   | 100% |
|  |              | Steel Fabrication and Erection  | 100% |
|  |              | Roofing and Membranes   | 75%  |
|  |              | Building Envelope   | 60%  |
|  |              | Interior Finishes   | 15%  |
|  |              | Note: Project tracking behind schedule.                               |      |
| Forest Lawn High School<br>Modernization   | TBC          |   |      |
|  |              |   |      |
|  |              |   |      |
|  |              | Note: Managed by CBE. Consultants to be appointed.                    |      |
| Coventry Hills/Country Hills Village<br>School<br>K-4                                | TBC          |   |      |
|  |              |   |      |
|  |              |   |      |
|  |              | Note: Managed by Alberta Infrastructure. Consultants to be appointed. |      |
| Cranston School<br>K-4   | TBC          |   |      |
|  |              |   |      |
|  |              |   |      |
|  |              | Note: Managed by Alberta Infrastructure. Consultants to be appointed. |      |
| Evergreen School<br>K-4  | TBC          |   |      |
|  |              |   |      |
|  |              |   |      |
|  |              | Note: Managed by Alberta Infrastructure. Consultants to be appointed. |      |



# CBE New, Completed & Modernized Schools



- Schools Being Developed
- ▲ Modernization
- Completed Schools

**Projects**

1. National Sport School
2. Booth Centre
3. Kenneth D. Taylor ES (Evanston)
4. Peter Lougheed MS (Saddle Ridge)
5. Copperfield School
6. New Brighton School
7. William D Pratt MS (Royal Oak/Rocky Ridge)
8. Nelson Mandela HS (Martindale)
9. Aboriginal Learning Centre (Mod)
10. Christine Meikle
11. Bowness HS (Mod)
12. Jack James HS (Mod)
13. Marshall Springs MS (Evergreen)
14. Eric Harvie (Tuscany)
15. Buffalo Rubbing Stone (Panorama Hills)
16. Auburn Bay School
17. McKenzie Highlands MS (McKenzie Town)
18. Dr. Martha Cohen MS (Copperfield)
19. Elbow Park ES
20. Rideau Park EJHS (Flood)
21. West Ridge MS (West Springs)
22. Dr. George Stanley MS (Cranston)
23. Hugh A. Bennett ES (Saddle Ridge)
24. Dr. Roberta Bondar (Aspen Woods)
25. Glenmeadows ES ext.
26. Southeast HS
27. Manmeet Singh Bhullar ES (Martindale)
28. James Fowler HS (Mod)
29. Griffith Woods ES/MS (Springbank Hill/Discovery Ridge)
30. Lord Beaverbrook HS (Mod)
31. Ron Southern ES (Silverado)



NAD 1983 3TM 114  
 Prepared by: Planning & Transportation  
 Map: New And Modernized Schools.mxd  
 Date: January 27, 2017

Marshall Springs School (Evergreen MS)



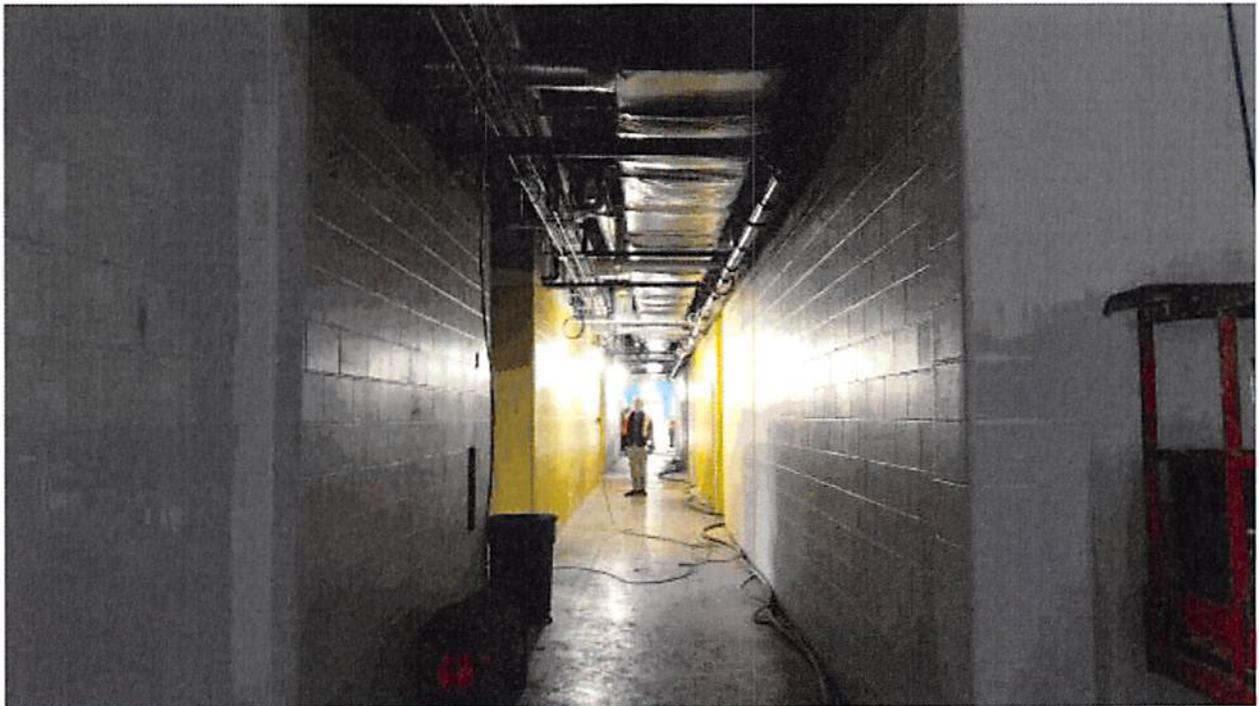
Marshall Springs School (Evergreen MS)



**Manmeet Singh Bhullar School (Martindale K-5)**



**Manmeet Singh Bhullar School (Martindale K-5)**



**Manmeet Singh Bhullar School (Martindale K-5)**



Griffith Woods School (Springbank Hill / Discovery Ridge School)



Griffith Woods School (Springbank Hill / Discovery Ridge School)



Griffith Woods School (Springbank Hill / Discovery Ridge School)



Ron Southern School (Silverado K-4)



Ron Southern School (Silverado K-4)

