

# public agenda

## Regular Meeting of the Board of Trustees

January 7, 2020  
12:00 p.m.

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

### R-1: Mission |

Each student, in keeping with their 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>			
	3.1 Legacy Award	Board	GC-3	
	<b>4   Results Focus</b>			
	<b>5   Operational Expectations</b>			
	5.1 OE-3: Instructional Program – Annual Monitoring	C. Usih	OE-3	Page 5-1
	<b>6   Public Comment</b>		GC-3.2	
	Requirements as outlined in Board Meeting Procedures			
	<b>7   Matters Reserved for Board Decision</b>	Board	GC-3	
	7.1 Annual Education Results Report 2018-2019 and Three-Year Education Plan 2019-2022		OE-1; R-1	Page 7-1
	7.2 Fall 2019 Update to the 2019-20 Budget and First Quarter Budget Variance Report		OE-5	Page 7-49
	7.3 Minutes of the Regular Meeting held November 12, 2019		GC-2	Page 7-105 (l'td distrib'n)
	7.4 Minutes of the Special Meeting held November 20, 2019		GC-2	Page 7-114 (l'td distrib'n)



Time	Topic	Who	Policy Ref	Attachment
	<b>8   Consent Agenda</b>	Board	GC-2.6	
	8.1 Items Provided for Board Approval			
	8.1.1 Minutes of the Regular Meetings held: <ul style="list-style-type: none"> <li>• November 21, 2019</li> <li>• November 26, 2019</li> </ul> <i>(THAT the Board approves the draft minutes as submitted.)</i>			Page 8-1 Page 8-4 (l'td distrib'n)
	<b>9   In-Camera Session</b>			
3:00 p.m.	<b>10   Adjournment</b>			
	<b>Debrief</b>	Trustees	GC-2.3	

**Notice |**

This public Board meeting will be recorded & posted online.  
Media may also attend these meetings.  
You may appear in media coverage.

Archives will be available for a period of two years.  
Information is collected under the authority of the School Act and the  
Freedom of Information and Protection of Privacy Act section 33(c)  
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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).

operational  
expectations  
monitoring report

## OE-3: Instructional Program

Monitoring report for the  
school year 2018-2019

Report date:  
January 7, 2020

### CHIEF SUPERINTENDENT CERTIFICATION

With respect to Operational Expectations 3: Instructional Program, the Chief Superintendent certifies that the proceeding information is accurate and complete.

- ☐ In Compliance.  
☒ In Compliance with exceptions noted in the evidence.  
☐ Not in Compliance.



Signed: \_\_\_\_\_  
 Christopher Usih, Chief Superintendent

Date: December 20, 2019

### BOARD OF TRUSTEES ACTION

With respect to Operational Expectations 3: Instructional Program, 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-3: Instructional Program

### Executive Summary

The Board of Trustees believes that providing high quality programming for all students is essential for student success, as defined in the Results. The Board believes that each student should have access to educational programming without financial barriers.

This Operational Expectation establishes the Board of Trustees' values and expectations for the Calgary Board of Education's work in providing an instructional program that supports student success

The Chief Superintendent's reasonable interpretation and indicators for OE 3: Instructional Program were approved on October 10, 2017. The Board of Trustees last monitored OE 3 on February 5, 2019. This report includes data available from the 2018-2019 school year and contains evidence to support the following findings:

Policy Statement	Indicator	Finding
3.1	3.1.1	Compliant
3.1	3.1.2	Compliant
3.1	3.1.3	Compliant
3.1	3.1.4	Compliant
3.1	3.1.5	Compliant
3.1	3.1.6	Compliant
3.1	3.1.7	Compliant
3.1	3.1.8	Compliant
3.2	3.2.1	Compliant
3.2	3.2.2	Compliant
3.2	3.2.3	Compliant
3.2	3.2.4	Compliant
3.2	3.2.5	Compliant
3.3	3.3.1	Compliant
3.3	3.3.2	Compliant
3.4	3.4.1	Compliant
3.4	3.4.2	Compliant
3.4	3.4.3	Non-compliant





### OE-3: Instructional Program

The Board of Trustees believes that providing high quality programming for all students is essential for student success, as defined in the Results. The Board believes that each student should have access to educational programming without financial barriers.

#### Board-approved Interpretation |

It is important for each student to have access to the learning opportunities that best meet their needs to reach their potential. These opportunities are not restricted based on an ability to pay.

The Chief Superintendent interprets:

- *high quality programming* to mean intentionally planned learning opportunities that provide students the opportunity to participate, progress and achieve.
- *educational programming* to mean learning opportunities that are rooted in the Program of Studies and planned to meet the learning needs of students.
- *without financial barriers* to mean the cost does not deny access of an individual student to an instructional program and the activities contained therein.

The Chief Superintendent shall:

3.1	Plan for and provide challenging, relevant and high quality programming opportunities that consider the educational needs of students, the choices of families and the fiscal and operational capacity of the organization.	Compliant
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#### Board-approved Interpretation |

Offering a variety of instructional programs to CBE students provides opportunities for learning that are personalized, accessible, engaging and meaningful.



**OE-3: Instructional Program**

The Chief Superintendent interprets:

- *plan* for to mean intentional identification of learning strategies in support of specific student learning outcomes.
- *challenging* to mean that each student is provided learning opportunities at an appropriate level for growth.
- *relevant* to mean learning opportunities are developed that are meaningful to the student.
- *educational needs* to mean those requirements specific to individual students that support progress in their learning.
- *high quality programming* to mean intentionally planned learning opportunities that provide students the opportunity to participate, progress and achieve.
- *fiscal capacity* to mean the amount of economic resources available to the organization considering the bounds of legislation and generally accepted accounting principles.
- *operational capacity* to mean the ability of the CBE to provide adequate resources within the funding provided and revenue collected.

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

1. 100 per cent of high school principals confirm that a flexibility component, as defined in High School Redesign, exists within each timetable.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

Data collection from principals confirmed 100% of high schools offer a flexibility component within each timetable. The consistent theme of the data demonstrated principal and staff commitment to provide a learning environment the set students up for success through opportunities to meet the mandate of the Programs of Study and complete high school.

A variety of strategies support the flexibility component with consideration of the population of students served, the resources and ability to offer flexibility components, and the ability to provide a teacher to further support students in the flexibility components. Strategies addressing flexibility included:



### OE-3: Instructional Program

- offering a 'flex' block scheduled within the day in which students could access help/support from teachers;
- scheduling time before and/or after scheduled classes for students to access additional help/support from teachers;
- providing the opportunity for choice in flex time for students to meet their own needs, as required, such as finding a quiet place to read or study, participating in physical activities, or seeking support from counsellors;
- access to online courses such as CALM or other online courses offered through CBe-Learn or Vista Virtual to address students' unique programming needs;
- offering a physical space in which students could work on their online course and seek support when needed;
- enabling flexible scheduling for dual credit, exploratory, work experience, or RAP courses;
- travel to other schools to access CTS courses not offered at home schools;
- the option of an additional year for English Language Learners to complete diploma requirements; and
- flexible courses to include credit recovery or credit rescue.

2. Principals confirm student learning plans contain personalized goals and strategies.

Compliant

*The organization is compliant with this indicator.*

#### *Evidence statement*

For the 2018-2019 school year, 100% of principals confirmed that student learning plans contained personalized goals and strategies. Teachers use a variety of strategies to support students in reflecting on their learning, setting goals and targets, and identifying their next steps in learning. Iris is an example of one tool that might be used to support students in their growth around personal development.

3. 100 per cent of principals confirm utilizing specialized assessments from professionals in support of student learning.

Compliant



**OE-3: Instructional Program**

*The organization is compliant with this indicator.*

*Evidence statement*

One hundred percent (100%) of principals indicated the use of specialized assessments from professionals in support of student learning. Specialized assessments might include information from psychologists, occupational therapists, physical therapists, or speech and language pathologists.

4. 100 per cent of alternative program proposals received by the Calgary Board of Education are considered within the context of the <i>Education Act</i> and the CBE Alternative Program Proposal Process.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

The superintendent of School Improvement confirms that there were no proposals for alternative programs received in the 2018-2019 school year.

5. The number of dual credit educational opportunities provided for high school students remains stable or increases.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

The number of dual credit education opportunities has increased each year since the 2014-2015 school year. In the 2018-2019 school year, there was an increase of 12 dual credit opportunities for a total of 26. The types of dual credit programs are impacted by a number of factors. One program, Fashion, was no longer offered in Calgary in the 2018-2019 school year. Other programs, such as First Responder and Production Field Operation were no longer designated dual credit programs. Others may be re-classified. However, in the 2018-2019 school year, there were new opportunities in Computer Science, Electrician, Engineering Design and



### OE-3: Instructional Program

Geospatial Tech, Political Science, and Software Development. Moving forward, student opportunities are increasing in Sociology, Medical Office Assistant, Health and Nursing, and Health Care Career Essentials.

6. The number of exploratory credit opportunities in Career and Technology Studies provided for high school students remains stable or increases.	Compliant
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*The organization is compliant with this indicator.*

#### *Evidence statement*

The number of exploratory credit opportunities in Career and Technology Studies has increased dramatically since the 2014-2015 school year from eight to 183 in the 2018-2019 school year. Factors impact the ability to offer exploratory opportunities include the program no longer being offered or blending an exploratory into a new exploratory. In the 2018-2019 school year, exploratory opportunities remained stable from the 2017-2018 school year. New exploratory opportunities included Foundations in Commercial Carpentry, Recreational Leadership, and Aircraft Maintenance. Moving forward student opportunities have increased in Culinary Arts and Emergency Medical Care.

7. No student is denied access to (whole class) off-site activities connected to the program of studies due to an inability to pay.	Compliant
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*The organization is compliant with this indicator.*

#### *Evidence statement*

It was confirmed by 100% of principals that no student attending the schools was denied access to whole class off-site learning activities due to an inability to pay.



**OE-3: Instructional Program**

8. A Three-Year Student Accommodation Plan is presented annually to the Board of Trustees for information.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

The Three-Year System Student Accommodation Plan 2019-2022 was presented to the Board of Trustees for information on June 18, 2019.

***Evidence demonstrates all indicators in subsection 1 are in compliance.***

3.2	Ensure that the instructional program is regularly evaluated and modified as necessary.	Compliant
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**Board-approved Interpretation |**

An important part of the school development planning process requires attention to multiple forms of evidence including student learning, perception and school process.

The Chief Superintendent interprets:

- *instructional program* to mean an identified set of learning opportunities that relate to achieving the learning outcomes as identified in the Alberta Education authorized programs of study.
- *evaluated and modified* to mean practices within the instructional program are continuously reviewed in response to student learning evidence, interests and need.

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

1. 100 per cent of principals confirm they use data to inform the creation and modification of school development plans.	Compliant
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### OE-3: Instructional Program

*The organization is compliant with this indicator.*

#### *Evidence statement*

With the exception of one site, 100% of principals report using data to inform the creation and modification of school development plans. This is confirmed through education directors (formerly area directors) and the school development process used by CBE. The one school that did not use data to inform the school development planning process was a new school, Joane Cardinal-Schubert High School, that would have been open two months prior to the due date of school development plans.

2. 100 per cent of principals report identifying and reporting to their community on the progress achieved towards targets as outlined in school development plans.	Compliant
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*The organization is compliant with this indicator.*

#### *Evidence statement*

One hundred percent (100%) of the principals confirmed sharing, with their community, the progress achieved towards targets in the school development plan. The one new school had focused on developing the culture of the school and engaging parents in feedback at the end of the year to inform the work moving forward.

3. School development plans are reviewed annually by area directors.	Compliant
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*The organization is compliant with this indicator.*

#### *Evidence statement*

The seven education directors (formerly area directors) indicated they had reviewed the school development plans for each school designated to their area. The education directors meet with principals individually and in teams to review the



**OE-3: Instructional Program**

process of creating the school development plan, the data informing decisions in creating a theory of action, the achievement goal, and the instructional goal. Education directors review the school development plans for coherence with respect to the 3-Year Education Plan, Results 2 – Academic Success, and school data.

4. School instructional programs and services supported centrally are monitored in accordance with the identified schedule.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

There are a number of school instructional programs and services supported centrally, such as specialized settings, psychology, dual credit, and exploratory programs. These programs are monitored on a regular basis for process alignment, capacity, resource investment and system need. This monitoring results in providing direction for possible changes and/or adaptations based on context, funding and student needs.

5. 100 per cent of principals confirm that they encourage teaching practices that are consistent with the system direction identified in the 3 Year Education Plan.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

One hundred percent (100%) of principals confirmed that their instructional leadership supported teaching practices consistent with the system direction as identified in the 3-Year Education Plan. Examples include high impact strategies, task design, data informed decision-making, and assessment.

***Evidence demonstrates all indicators in subsection 2 are in compliance.***





**OE-3: Instructional Program**

3.3	Ensure that no program emphasizes a particular religion, notwithstanding the <i>Education Act</i> definition of alternative programs.	Compliant
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**Board-approved Interpretation |**

As a public education system, the Calgary Board of Education will not promote the views of specific religions.

The Chief Superintendent interprets:

- *program* to mean an instructional program based on the outcomes identified in the Alberta Programs of Study.

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

1. An internal review confirms that no CBE program emphasizes a particular religion.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

For the 2018-2019 school year, 100% of principals confirm that practices in their school do not emphasize a particular religion.

2. 100 per cent of principals confirm compliance with AR 3067: Religion in Education.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

### OE-3: Instructional Program

One hundred percent (100%) of principals confirm that their schools were in compliance with AR 3067 | Religion in Education for the 2018-2019 school year.

***Evidence demonstrates all indicators in subsection 3 are in compliance.***

3.4	Provide safe and reliable transportation services that consider the learning needs of students, the choices of families, and the fiscal and operational capacity of the organization.	Compliant
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#### Board-approved Interpretation |

It is important for CBE to balance the services required to support educational programming choices with the associated costs while operating in a fiscally sound and responsible manner.

Transportation provided must take steps to reduce the risk of harm to students (or protect students from harm) and be consistently dependable.

The Chief Superintendent interprets:

- *transportation services* to mean companies contracted by CBE to provide transportation to and from school for students including public transit.
- *safe* to mean precautions are taken to protect students from harm while travelling to and from school in vehicles provided by the contracted transportation services.
- *reliable* to mean routes are completed timely and consistently unless prohibited by circumstances beyond the carrier control.
- *fiscal capacity* to mean the amount of economic resources available to the organization considering the bounds of legislation and generally accepted accounting principles.
- *operational capacity* to mean the ability of the CBE to provide programs and services within the funding provided and revenue collected.

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



**OE-3: Instructional Program**

1. 100 per cent of school bus stops and zones are found to be in compliance with the Alberta Education Route Assessment criteria.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

A route assessment was completed on all bus routes for the 2018-2019 school year and any concerns were addressed. All bus routes are in compliance with the Alberta Education Route Assessment criteria.

2. Mechanisms are in place to administer penalties to contracted carriers for instances of unreliability such as tardiness or absence.	Compliant
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*The organization is compliant with this indicator.*

*Evidence statement*

Contracts with service providers provide performance measures that allow CBE to administer penalties for instances of service concerns. In addition, routes have been re-assigned to other service providers in response to poor performance measures.

3. Transportation services provided by the CBE balance the cost of providing the service with the grants received from the province and revenue generated through fees through a balanced budget.	Non-Compliant
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*The organization is non-compliant with this indicator.*

*Evidence statement*



### OE-3: Instructional Program

The 2018-2019 audited financial statement reports a 5.26 million dollar deficit. Transportation services continues to look for efficiencies to operate within available funding and fees.

*Evidence demonstrates not all indicators in subsection 4 are in compliance.*



## OE-3: Instructional Program

### 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.



## report to Board of Trustees

## Annual Education Results Report 2018-2019 and Three-Year Education Plan 2019-2022

Date	January 7, 2020
Meeting Type	Regular Meeting, Public Agenda
To	Board of Trustees
From	Christopher Usih, Chief Superintendent of Schools
Purpose	Decision
Originators	Joanne Pitman, Superintendent, School Improvement Dianne Yee, Acting Superintendent, School Improvement Brad Grundy, Superintendent, Chief Financial Officer, Corporate Treasurer Dany Breton, Superintendent, Facilities and Environmental Services Kelly Ann Fenny, General Council Marla Martin-Esposito, Chief Communications Officer
Governance Policy Reference	Operational Expectation, OE-1: Global Operational Expectations Results, R-1: Mission
Resource Persons	Elizabeth Wood, Education Director, Research & Strategy Ed Sutlic, Director, Corporate Finance Anne Trombley, Manager, Planning

### 1 | Recommendation

It is recommended:

THAT the Board of Trustees approves the Annual Education Results Report 2018-2019 and the Three-Year Education Plan 2019-2022, and authorize its submission to Alberta Education.



## 2 | Issue

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School authorities use their Three-Year Education Plan and the Annual Education Results Report as key elements of the Alberta Education Accountability Framework for the K - 12 education system. School authorities interpret and report results to parents/guardians, students, the Ministry of Education and the public in a manner and at a time the Minister of Education prescribes as part of ensuring transparency.

The Ministry has stated that results provided are used to improve the quality and effectiveness of education programs provided to students and to improve student learning and achievement. The Minister's requirements, set out in the *Policy and Requirements for School Board Planning and Results Reporting*<sup>1</sup>, ensure that school board and school education plans, and annual results reports are aligned with the Ministry of Education's vision, mission, goals, outcomes and specific performance measures for the education system.

## 3 | Background

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The K - 12 education system in Alberta is the responsibility of the Ministry of Education. The Ministry allocates funds to school authorities to allow them to carry out delegated responsibilities. School authorities are obligated to demonstrate accountability for this funding and for the success of students. This public transparency addresses outcomes, goals and priorities established by Alberta Education's Business Plan to meet the educational needs of students along with the local outcomes and strategies in the Three-Year Education Plan that consider the unique characteristics of each authority.

## 4 | Analysis

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The *Annual Education Results Report 2018-19 and Three-Year Education Plan 2019-22* are combined into an Accountability Framework to provide a broad strategic plan encompassing CBE schools, Areas, departments and service units in support of CBE and provincial Outcomes. It also informs the budgeting process as outlined in OE-5 Financial Planning.

The *Annual Education Results Report 2018-19* demonstrates progress made over the past year in meeting the Goals and Outcomes set out by Alberta Education.

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<sup>1</sup> Policy and Requirements for School Board Planning and Results Reporting November 2019  
<https://open.alberta.ca/dataset/e57edbb6-3a82-47f2-ba09-58eba3a38cec/resource/efc5eb24-db1c-45ee-b730-10ad5242ceb7/download/edc-policy-and-requirements-for-school-board-planning-and-results-reporting-2019.pdf>

To assist school authorities in assessing progress, through their Accountability Pillar Report, Alberta Education provides the following measure evaluations: Achievement, Improvement and Overall.

The Achievement Evaluation is based on a comparison of Current Year<sup>2</sup> 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.

Further details of the way these measures are calculated can be found on pages 36 and 37 of Attachment 1: *Calgary Board of Education Annual Education Results Report 2018-19 and Three-Year Education Plan Report 2019-22*.

### Authority Accountability Pillar Results: Overall Summary: All Students

The Calgary Board of Education's Achievement Evaluation for all students continues a high pattern of success – there are no low or very low Achievement Measures in this summary.

The Achievement Evaluation was rated *High* or *Very High* in 13 of 16 measures.

The *2018-19 Annual Education Results Report* Accountability Pillar Overall Summary reflects an Achievement Evaluation of *Very High* for:

- Program of Studies
- Drop Out Rate
- Diploma: Excellence

An Achievement Evaluation of *High* was reported for:

- Safe and Caring
- Education Quality
- High School Completion Rate (3 yr)
- PAT: Excellence
- Diploma: Acceptable
- Diploma Exam Participation Rate (4+ Exams)
- Transition Rate (6 yr)
- Work Preparation
- Citizenship
- School Improvement

An Achievement Evaluation of *Intermediate* was reported for:

- PAT: Acceptable
- Rutherford Scholarship Eligibility Rate
- Parental Involvement

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<sup>2</sup> For Drop Rate, High School Completion Rate (3 yr), Diploma Exam Participation Rate (4+ Exams), Rutherford Scholarship Eligibility Rate and Transition Rate (6 yr) the "Current year" is 2017-18. For all other measures the "Current Year" is 2018-19.



The 2018-19 Annual Education Results Report Accountability Pillar Overall Summary Improvement Evaluation, reflects an evaluation of *Improved* or *Improved Significantly* for eight of 16 measures.

An Improvement Evaluation of *Improved Significantly* was reported for:

- Drop Out Rate
- High School Completion Rate (3 yr)
- PAT: Acceptable
- PAT: Excellence
- Diploma: Acceptable
- Diploma: Excellence
- Rutherford Scholarship Eligibility Rate

An *Improved* Improvement Evaluation was reported for:

- Diploma Exam Participation Rate (4+ Exams)

A *Maintained* Improvement Evaluation was reported for:

- Program of Studies
- Transition Rate (6 yr)
- Work Preparation
- Parental Involvement

A *Declined* Improvement Evaluation was reported for:

- Education Quality

A *Declined Significantly* Improvement Evaluation was reported for:

- Safe and Caring
- Citizenship
- School Improvement

Even though the Achievement Evaluation for Safe and Caring, Education Quality, Citizenship, and School Improvement each reported a *High* and each was within 2.4 percentage points or less of the provincial results, each reported a *Declined* or *Declined Significantly* Improvement Evaluation

**Note** For outcomes where the Overall Evaluation is *Issue* or *Concern* targets have been set.

## Accountability Pillar Results Overall Summary: Students Self-Identified as Indigenous

An Achievement Evaluation of *Intermediate* was reported for:

- Drop Out Rate
- Diploma: Acceptable
- Diploma: Excellence

Very Low Achievement Evaluation was reported for:

- High School Completion Rate (3yr)
- PAT: Acceptable
- PAT: Excellence
- Diploma Exam Participation Rate (4+ Exams)
- Rutherford Scholarship Eligibility Rate
- Transition Rate (6 yr)

An Improvement Evaluation of *Improved Significantly* was reported for:

- PAT: Acceptable

An Improvement Evaluation of *Improved* was reported for:

- High School Completion Rate (3 yr)
- Diploma Exam Participation Rate (4+ Exams)

An Improvement Evaluation of *Maintained* was reported for:

- Drop Out Rate
- PAT: Excellence
- Diploma: Acceptable
- Diploma: Excellence
- Rutherford Scholarship Eligibility Rate
- Transition Rate (6 yr)

**Note** For outcomes where the Overall Evaluation is *Issue* or *Concern* targets have been set.

## 5 | Conclusion

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In the Calgary Board of Education, the Three-Year Education Plan 2019-22 provides direction and clarity of purpose while remaining broad enough to allow each school, Area, department and service unit to formulate actions in response to the unique needs revealed by their own data.

This Board report demonstrates how strategies developed to facilitate improved Outcomes for CBE students align with the jurisdiction's results. It considers, as well, the ways in which budget and capital and facilities planning support these strategies.



CHRISTOPHER USIH  
CHIEF SUPERINTENDENT OF SCHOOLS

### **Attachment I: The Calgary Board of Education Annual Education Results Report 2018-19 and Three-Year Education Plan 2019-22**

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

Board: Board of Trustees

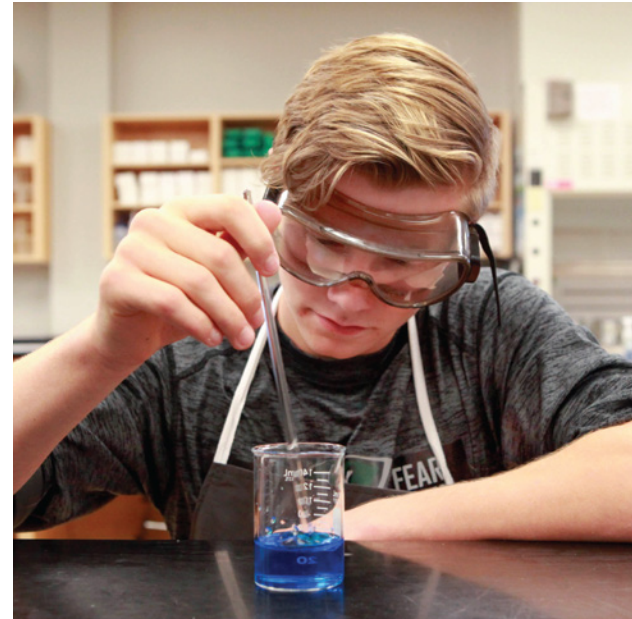
Governance Culture: The Board defined its own work and how it will be carried out. These policies clearly state the expectations the Board has for individual and collective behaviour.

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.

OE - 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.

# Focus | Strategies for Success



Annual Education Results Report 2018-19  
Three-Year Education Plan 2019-22

learning | as unique | as every student



Calgary Board  
of Education



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## Accountability Statement

The Annual Education Results Report for the 2018-19 school year and the Three-Year Education Plan commencing Sept. 1, 2019 for the Calgary Board of Education were prepared under the direction of the Board in accordance with its responsibilities under the *Education 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 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 plan to improve student learning and results.

The Board approved this combined Annual Education Results Report for the 2018-19 school year and the Three-Year Education Plan for 2019-22 on January 7, 2020.

Marilyn Dennis  
Chair, Board of Trustees  
Calgary Board of Education

Christopher Usih  
Chief Superintendent of Schools  
Calgary Board of Education

# Annual Education Results Report (AERR) Summary

## Mission

Each student, in keeping with their 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.

## 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 2019-20

More than 125 800 students in 246 schools, including:

- 121 527 students from pre-kindergarten to Grade 12;
- 541 students fully enrolled in CBe-Learn (our online learning school), with over 1040 students registered in courses with CBe-Learn while enrolled at another school;
- 746 students in full-day kindergarten across 17 schools;
- 1124 students upgrading high school courses and pursuing continuing education through Chinook Learning Services;
- Over 24 250 students with identified special education needs, the majority of whom are learning in their community schools;
- over 30 000 English language learners;
- over 5300 students self-identify as Indigenous;
- over 8900 students in French Immersion; and
- over 5000 students in bilingual language programs other than French.

## 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 were above the provincial results in four out of five subjects at the Acceptable Standard and the Standard of Excellence.

On Diploma Examinations:

- The percentage of CBE students achieving the Acceptable Standard was at or above the provincial results on ten of the eleven diploma examinations.
- At the Standard of Excellence, the percentage of CBE students achieving the standard was above the provincial results on eleven of eleven examinations.

**Note |** Details of provincial assessment results can be found at CBE [Provincial Assessment & Reports](#).



On the *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 35 and 36.

The CBE's Achievement Evaluation was *Very High* or *High* for 13 of 16 measures and *Intermediate* for the remaining three.

On the *Accountability Pillar Overall Summary - Oct 2019* the following measures were evaluated by the province as *Improved Significantly*:

- Drop Out Rate
- High School Completion Rate (3 yr)
- Provincial Achievement Test results at the Acceptable Standard
- Provincial Achievement Test results at the Standard of Excellence
- Diploma Examination results at the Acceptable Standard
- Diploma Examination results at the Standard of Excellence
- Rutherford Scholarship Eligibility Rate

In the following areas, improvement was *Maintained* on:

- Program of Studies
- Transition Rate (6 yr)
- Work Preparation
- Parental Involvement

## CBE Strategies for Excellence and Continued Improvement

Our overall strategy is to advance equity by personalizing learning for each student through:

- achievement & well-being;
- organizational effectiveness & service transformation;
- strategic allocation of resources to support students needs; and
- developing our employees.

Through these strategies, the CBE supports the outcomes in Alberta Education's Business Plan 2019-23<sup>1</sup>.

## Engaging Stakeholders

At the CBE, our work is guided by our framework for community engagement called Dialogue. The *Dialogue Framework* provides a process and guidelines for involving students, staff, families and community members in decisions that affect them. We know we make better decisions when we work together with our communities to solve problems and find solutions.

A collaborative approach is beneficial in supporting student success. Students have a voice through the following opportunities:

- contributing their ideas and interests to the design of daily learning tasks;
- the Chief Superintendent's Student Advisory Council;
- participating on advisory groups such as the High School Engagement Advisory Group;
- surveys and focus groups;
- their school's Principal Advisory Council; and
- other unique opportunities within our schools

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<sup>1</sup> Alberta Education Business Plan 2019-23. Retrieved December 9, 2019 from <https://open.alberta.ca/dataset/cea65c12-a239-4bd9-8275-3ab54d84f5b3/resource/ce27c085-4217-4ea6-8a41-a666d52d9a1e/download/education.pdf>

In February 2019, more than 25 000 CBE students, over 5400 parents/guardians and more than 5400 teachers responded to the provincial Accountability Pillar Survey. The following results have an Achievement Measure of *High* or *Very High*:

- 88.0% 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.
- 82.3% are satisfied with the opportunity for students to receive a broad program of studies including fine arts, career, technology, and health and physical education.
- 88.6% are satisfied with the overall quality of basic education.
- 78.7% agree that students are taught attitudes and behaviours that will make them successful at work when they finish school.
- 80.5% are satisfied that CBE students model the characteristics of active citizenship.
- 78.8% indicated that their school and schools in their jurisdiction have improved or stayed the same the last three years.

## School Councils

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;
- providing a forum for discussion of school philosophies, results, school budgets and operations that contribute to the creation of the school development plan; and
- reporting to the community on the progress achieved towards the goals and targets in the school development plan.

## Financial Summary

- Alberta Education grant revenue makes up 93 per cent of total revenues.
- Funding is spent primarily on Salaries and Benefits at 78 per cent of total expenses.
- The 2018-19 actual deficit of \$3.5 million is \$2.5 million less than the budgeted deficit of \$6.0 million.

**Note** | Detailed CBE budget and financial information can be found at [Budget and Financial Information](#).

The Calgary Board of Education Annual Education Results Report 2018-19 and Three-Year Education Plan 2019-22 may be accessed using the following link: <https://www.cbe.ab.ca/FormsManuals/AERR-2018-19-3-YEP-2019-22.pdf>

The Calgary Board of Education Average Class Size Report 2018-19 can be viewed at: <https://www.cbe.ab.ca/about-us/provincial-tests-and-reports/Pages/default.aspx>

## CBE Disclosure

The CBE Public Interest Disclosure (Whistleblower Protection) policy was approved in February 2014. From September 30, 2018, up to and including September 29, 2019 the following has been received:

Disclosures received by the Designated Officer	4
Disclosures acted on	1
Disclosures not acted on	3
Investigations commenced by the Designated Officer as a result of disclosures	0

## Our Ultimate Goals

The CBE Annual Education Results Report 2018-19 combined with the CBE Three-Year Education Plan 2019-22 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 their 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.

## CBE Three-Year Education Plan 2019-22 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 the goals of Alberta Education Outcome One where “Alberta Education supports students in progressing in their learning through open critical debate, becoming lifelong learners inspired to pursue their interests and aspirations, achieve fulfilment and success, and contribute to their communities and the world.”<sup>2</sup> This coherent framework of CBE and provincial outcomes support individual schools in their work with each student.

cbe.ab.ca

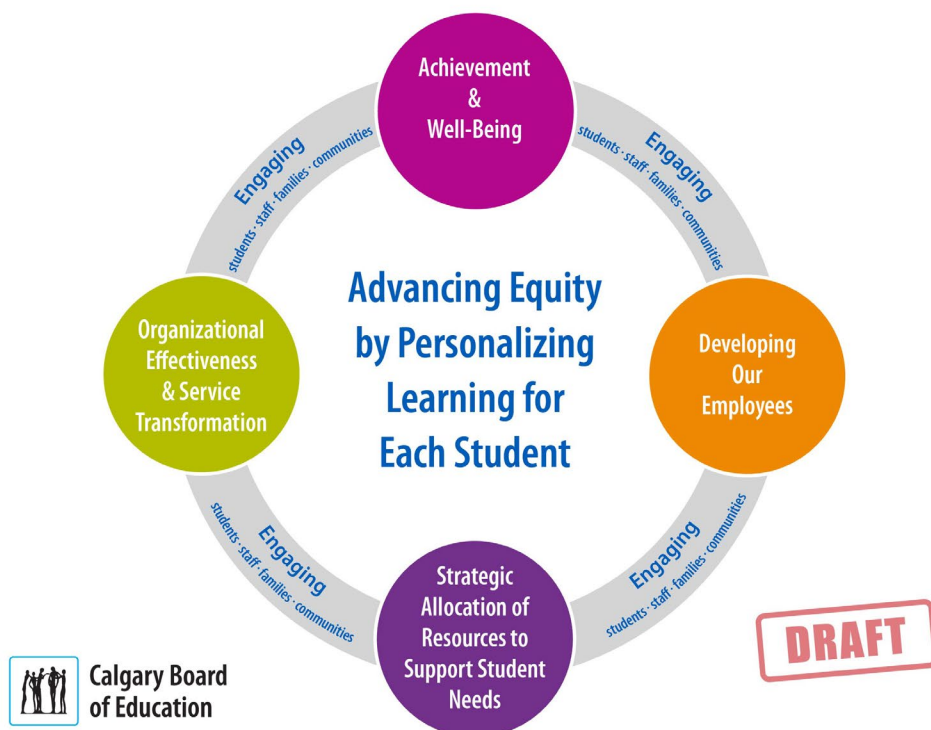
### 2019-2022 | Three-Year Education Plan



**Mission** | Each student, in keeping with their individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning.

**Values** | Students come first • Learning is our central purpose • Public education serves the common good

Public education is a shared responsibility. Together we commit to success for each student, every day, no exceptions.



<sup>2</sup> Alberta Education Business Plan 2019-23 (p. 50). Retrieved December 9, 2019 from <https://open.alberta.ca/dataset/cea65c12-a239-4bd9-8275-3ab54d84f5b3/resource/ce27c085-4217-4ea6-8a41-a666d52d9a1e/download/education.pdf>

# Advancing Equity by Personalizing Learning for Each Student

Success for each student, every day, no exceptions

How we  
support  
our students

## Achievement & Well-Being

- **Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.**
  - Further consistency of assessment and reporting by calibrating to a system standard.
  - Use high-impact instructional strategies.
  - Incorporate culturally responsive instructional design and assessment by honouring Indigenous knowledge systems, languages and histories.
  - Enhance student voice in learning, assessment and decision-making.
- **Advance literacy, numeracy and learning competencies that incorporate critical thinking, communication, creativity, collaboration, citizenship and character.**
  - Build capacity to support concept-based curriculum and instruction.
  - Leverage the use of technology in learning environments to meet the needs of diverse learners.
- **Create conditions for success for each student in a welcoming, caring, respectful and safe learning environment.**
  - Continue to develop environments where each student is known and develops a sense of competence, confidence and belonging as a learner.
  - Further develop school environments that foster resiliency in students.
  - Work with partners to provide access to well-being and mental health supports for students.

How we  
do our  
work

## Organizational Effectiveness & Service Transformation

- **Employ a strategic approach to align resources, supports and services with the Three-Year Education Plan and system priorities.**
  - Make decisions based on evidence, data, input and guiding documents.
  - Use the School Support Model to further collaboration, shared decision-making, transparency and accountability.
  - Eliminate duplication of services and reduce inefficiencies.
  - Enhance coordination between schools and service units.
  - Leverage technology to improve operational efficiency.
- **Communicate and engage with our students, staff, families and communities to support effective decision-making.**
  - Use the *Dialogue Framework* to support community engagement activities.
  - Communicate decisions effectively.
- **Support effective system and Board governance.**
  - Mitigate risk to the organization.
  - Review and update our Administrative Regulations to ensure compliance with provincial regulations and/or Board policies.

**Build trust and collaborative relationships with students, staff, families and communities through respectful and responsive dialogue.**

How we  
use our  
resources

## Strategic Allocation of Resources to Support Student Needs

- **Allocate human and financial resources based on student needs.**
  - Align resource allocation with the provincial funding framework and with system priorities and equity goals.
  - Allocate resources based on need to support students with equitable access to programs and services across the system.
- **Develop a sustainable system-wide plan to optimize, commission, modernize and maintain school facilities to foster enriching learning environments.**
  - Develop a sustainable system-wide plan for high schools that continues to offer students access, flexibility and choice in programming given available space and resources.
  - Promote system-wide approaches to environmental sustainability.

How we  
support  
our people

## Developing Our Employees

- **Build the capacity of our employees**
  - Advance succession planning through mentoring, coaching and on-the-job training.
  - Provide opportunities for professional learning for our employees.
- **Build coherence and continuous improvement in program provision, service delivery and professional learning through a collaborative and evidence-informed culture.**
  - Continue to build skill in generating and interpreting data across CBE leadership teams.
- **Foster a welcoming, caring, respectful, inclusive and safe work environment.**
  - Continue to build employee awareness of mental health and well-being supports.

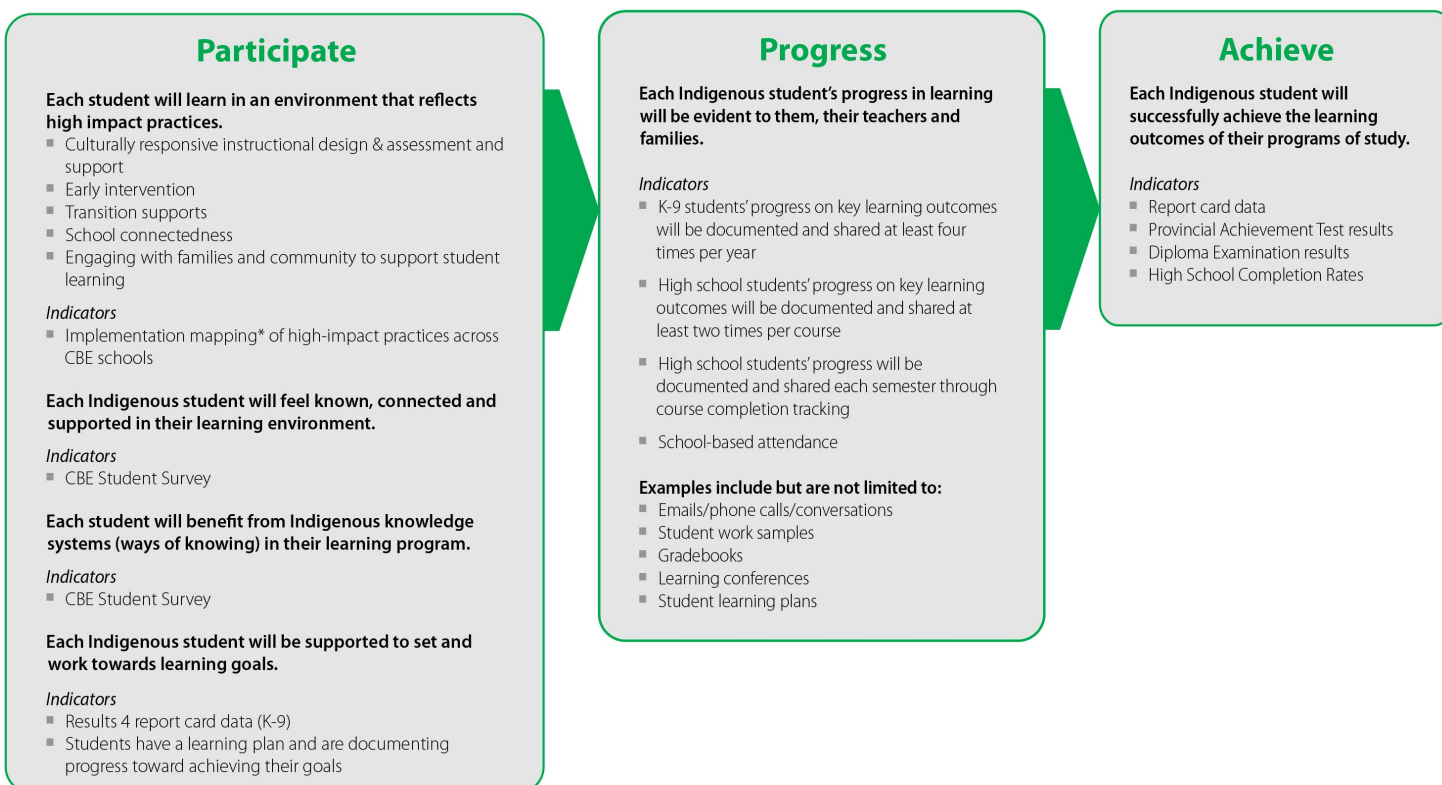
**DRAFT**



# Indigenous Education Strategy 2018-21\*

**Outcome 1:** Each Indigenous student will participate, progress and achieve in their learning programs.

**Outcome 2:** Each CBE student's learning experiences are advanced by the strength and diversity of Indigenous knowledge systems (ways of knowing) through their learning programs.



\* Through this process, School Development Plan actions are documented and tracked over time.

\*This is the second year of a three-year plan that commenced in 2018-19.

# Indigenous Education Strategy 2018-21\*

## Priorities

### Cultivating a Balanced and Respectful Relationship

Cultivating a balanced and respectful relationship between Indigenous knowledge systems and existing CBE knowledge systems in how we think about and do everything.

### Advancing Culturally Responsive Instructional Design & Assessment

Honouring Indigenous knowledge systems, languages and histories through responsive learning environments and instructional design & assessment for the benefit of all students.

### Advancing System-Wide Learning

Ensuring staff are knowledgeable, understanding and respectful of the strength and diversity of First Nations, Métis and Inuit; the implications of treaties and agreements with First Nations and Métis; 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.

## Key Actions

### Key Actions 2018-19

#### Teaching and Learning/Community Engagement

- Design/offer professional learning to address: pattern of requests from schools; the Teaching/Leadership Quality Standards; high-impact practices; and, the Three-Year Education Plan
- Describe/highlight high-impact practices
- Provide easy access to resources/professional learning within CBE and the province
- Provide guidance re: cultural protocols
- Advance collective and respectful approaches to working with students, families, staff and community
- Advance professional learning from elementary/middle/junior and high school cohorts
- Advance Niitsitapi li tass ksii nii mat tsoo kop (Niitsitapi Learning Centre) as a place for early/professional learning
- Build understanding of Indigenous languages as key dimension of Indigenous knowledge systems (ways of knowing)
- Build understanding about data and measures that reflect Indigenous ways of knowing
- Advance Indigenous knowledge systems and holistic approaches as an integral part of the Three-Year Education Plan

#### Business Supports

- Allocation of human and financial resources to enable implementation of high impact practices
- Succession and recruitment planning for Indigenous education

### Key Actions 2019-20

#### Teaching and Learning/Community Engagement

- Include measures of student success that reflect Indigenous ways of knowing in the Indigenous education strategy
- Continue revision and extension of previous implementation strategies

### Key Actions 2020-21

#### Teaching and Learning/Community Engagement

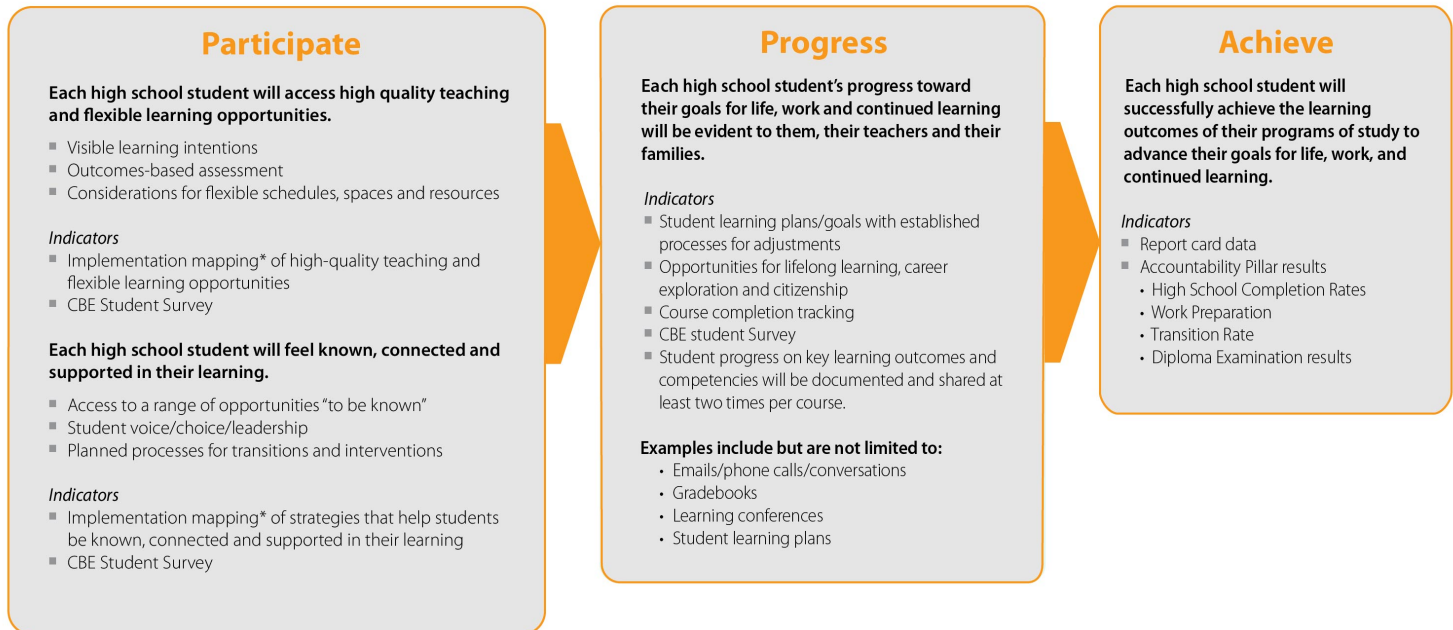
- Continue revision and extension of previous implementation strategies

\*This is the second year of a three-year plan that commenced in 2018-19.

## High School Success Strategy 2018-21\*

### Outcome:

Each CBE high school student will participate, progress and achieve in their learning programs.



\* Through this process, School Development Plan actions are documented and tracked over time.

Alberta Education identifies three outcomes for high school redesign ■ engaged students ■ high levels of achievement ■ quality teaching

\*This is the second year of a three-year plan that commenced in 2018-19.



## High School Success Strategy 2018-21\*

### Conditions for Success

Alberta Education's Moving Forward with High School Redesign (MFWHSR) highlights conditions for student success. Through the MFWHSR principles the Calgary Board of Education attends to these conditions:

#### Pedagogy

- Designing personalized learning for students through professional learning/networks in task design and assessment.
- Implementing 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

- Establishing a welcoming, caring, respectful and safe learning environment.
- 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.



## Key Actions

### Key Actions 2018-19

- Extend instructional design practices that include outcomes-based assessment through:
  - professional learning networks.
  - responsive and distributed leadership.
- Communicate a continuum of flexible practices that allow students to be known and their learning/life goals to be supported and enriched.
- Expand and communicate opportunities for student voice/choice/leadership.
- Extend and share trauma-informed practices through the high school success learning collaboratives.
- Develop transition processes for students to enter, transition through and finish school their way:
  - strengthening career development opportunities.
  - increasing access to unique pathways including dual credit.

### Key Actions 2019-20

- Evolve data sets that inform future action.
- Continue revision and extension of previous implementation strategies.

### Key Actions 2020-21

- Continue revision and extension of previous implementation strategies.

\*This is the second year of a three-year plan that commenced in 2018-19.

## Literacy Strategy 2018-21\*

**Outcome:** Each CBE student will participate in intentional, joyful literacy learning to progress and achieve in their learning programs.

### Participate

**Each student will learn in a joyful, literacy-rich environment characterized by:**

- developing relationships and understanding identities through shared literacy experiences
- language play and exploration
- choice in instructional texts
- multimodal tools and texts
- responsive, explicit instruction
- classroom discussion

**Indicators**

- Student reports of literacy learning experiences as recorded on the CBE Student Survey.

**Each student will learn in an environment that reflects high-impact instructional strategies for literacy learning, including:**

- formative assessment and feedback
- student self and peer assessment
- small group or one-on-one instruction targeted to students' specific learning needs
- gradual release of responsibility
- spaced practice

**Indicators**

- Implementation mapping\* of high-impact instructional strategies across CBE schools.

**Each student's learning program will include instruction in disciplinary literacy.**

**Indicators**

- Implementation mapping\* of disciplinary literacy instruction across CBE schools.

### Progress

**Each student's progress in literacy learning will be evident to them, their teachers and families.**

**Indicators**

- K-9 students' progress on key learning outcomes will be documented and shared at least four times per year.
- High school students' progress on key learning outcomes will be documented and shared at least two times per course.

**Examples include but are not limited to:**

- Reading
  - Running records
  - Student annotations of texts read
  - Oral reading recordings
  - Student writing about texts read
  - Structured observations of students reading
  - Informal reading inventories for students not achieving grade level expectations
- Writing
  - Artifacts of student writing with teacher analysis
  - Structured observations of students writing
- Oral Language
  - Recordings of students speaking
  - Structured observations of students' language

### Achieve

**Each student will successfully achieve the learning outcomes of their programs of study.**

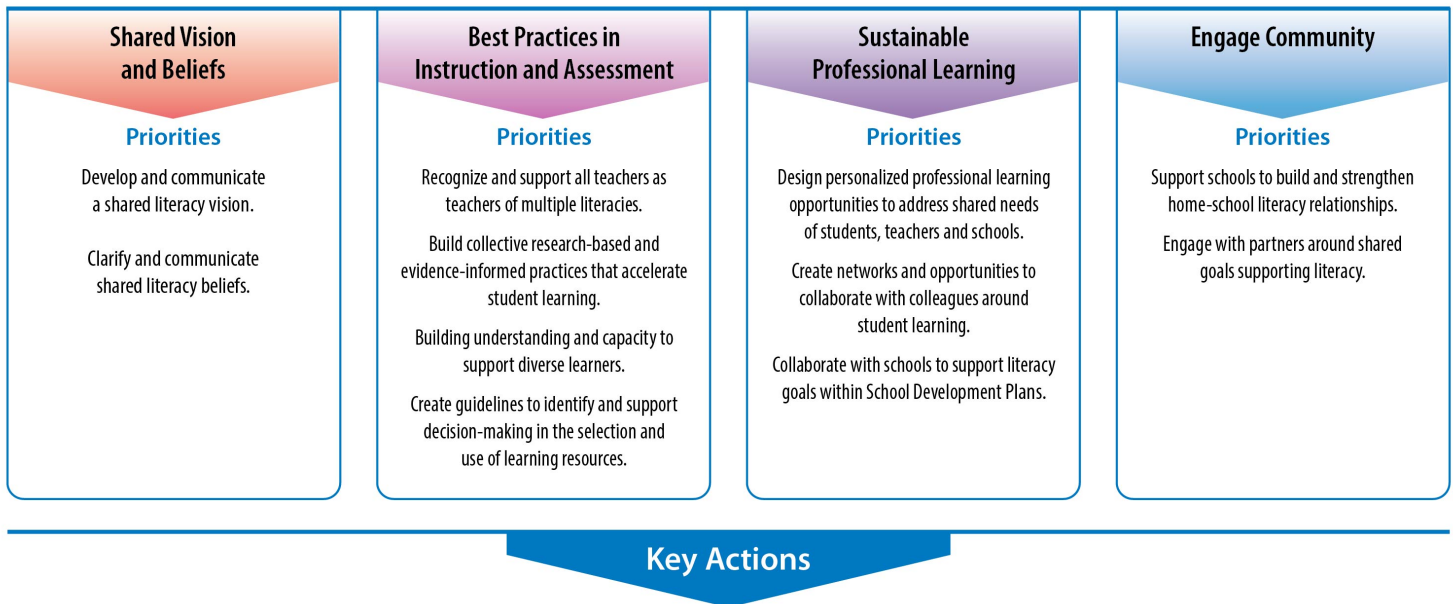
**Indicators**

- Language Arts report card data
- Provincial Achievement Test results
- Diploma Examination results

\* Through this process, School Development Plan actions are documented and tracked over time.

\*This is the second year of a three-year plan that commenced in 2018-19.

## Literacy Strategy 2018-21\*



### Key Actions 2018-19

- Build a shared understanding of middle-junior years literacy.
- Continue to build shared understandings of literacy, disciplinary literacy, literacy-rich learning environments and high-impact literacy instructional and leadership practices.
- Identify and build additional assessment resources for key reading and writing learning outcomes for Language Arts
- Identify and build assessment resources for key disciplinary literacy outcomes for Mathematics, Science and Social Studies.
- Support additional literacy professional learning through school organized cohorts, school-based residencies and individual teacher opportunities.
- Continue to build data sets to inform future years' actions.

### Key Actions 2019-20

- Continue revision and extension of previous implementation strategies.
- Continue to build and respond to data sets to inform future years' actions.

### Key Actions 2020-21

- Continue revision and extension of previous implementation strategies.

\*This is the second year of a three-year plan that commenced in 2018-19.

# Mathematics Strategy 2018-21\*

**Outcome:** Each CBE student will participate in active, rigorous mathematics learning to progress and achieve in their learning programs.

## Participate

**Each student will learn in an environment that fosters mathematical engagement and proficiency through:**

- meaningful mathematical discussion
- productive struggle and challenge
- active participation in reasoning and sense-making
- intentional learning progressions and connections
- procedural fluency developed from conceptual understanding
- a focus on mental math and automaticity

### Indicators

- Student reports of mathematics learning experiences as recorded on the CBE Student Survey.

**Each student will learn in an environment that reflects high-impact instructional strategies for mathematics learning, including:**

- formative assessment and feedback
- student self and peer assessment
- small group or one-on-one instruction targeted to students' specific learning needs
- spaced practice

### Indicators

- Implementation mapping\* of high-impact instructional strategies across CBE schools.

**Each student's learning program will include instruction in numeracy across all subject areas.**

### Indicators

- Implementation mapping\* of numeracy instruction across CBE schools.

## Progress

**Each student's progress in mathematics learning will be evident to them, their teachers and families.**

### Indicators

- K-9 students' progress on key learning outcomes will be documented and shared at least four times per year.
- High school students' progress on key learning outcomes will be documented and shared at least two times per course.

**Examples include but are not limited to:**

- Computational Fluency
  - Running records for basic facts
  - Student computation work samples
  - Student explanations of accuracy, efficiency and flexibility in procedures and strategies
  - Structured observations of students applying procedures and strategies
- Modeling and Representing Mathematical Ideas
  - Artifacts of models and representations
  - Student explanations about connections between mathematical representations
  - Structured observations of students representing mathematical ideas
- Problem Solving and Reasoning
  - Benchmarked problems with assessment criteria
  - Structured observations of students solving problems

## Achieve

**Each student will successfully achieve the learning outcomes of their Programs of Study.**

### Indicators

- Mathematics report card data
- Provincial Achievement Test results
- Diploma Examination results

\* Through this process, School Development Plan actions are documented and tracked over time.

\*This is the second year of a three-year plan that commenced in 2018-19.

# Mathematics Strategy 2018-21\*

## Framework and Priorities

### Positive Mathematics School Culture

- Know that every student can be successful and confident at learning mathematics.
- Teachers and parents help build mathematical thinking by connecting mathematics to other subjects and everyday life.
- Recognize and support all teachers as teachers of numeracy.

### Active, Rigorous Mathematics Learning

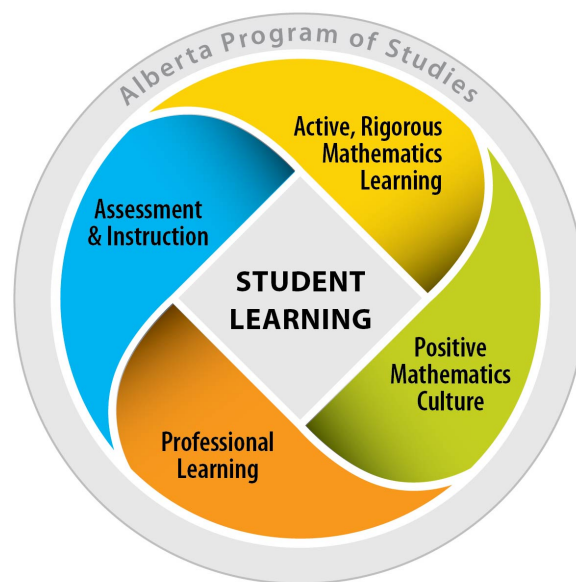
- Build strong mathematical foundations so students can understand complex mathematical ideas.
- Ensure students participate in learning activities that develop their mathematical reasoning and communication skills.
- Create more opportunities for students to be active problem solvers and make connections between concepts.

### Assessment and Instruction

- Build opportunities for students to practice mathematics skills over time.
- Focus on the connections between conceptual understanding, problem solving and mental math.
- Use mathematical discussion with and among students to build and solidify concepts.
- Communicate clearly with families about student learning in mathematics.
- Strengthen the use of specific feedback and guidance to students during learning.

### Professional Learning

- Build teacher confidence and skill with mathematics content and teaching through:
  - Whole-school learning
  - Teacher collaboration within schools
  - Individual teacher learnings



## Key Actions

### Key Actions 2018-19

- Deploy Math learning coaches in classrooms.
- Exceed Alberta Education's recommended instructional time in Mathematics 1-9 by 25%.
- Build shared understandings of high-impact mathematics instructional and assessment practices with a focus on learning progressions and procedural fluency.
- Support additional mathematics professional learning through Math Leads, school-based support and individual teacher opportunities.
- Continue to build assessment resources for procedural fluency and problem solving.
- Continue to build coherence in communicating with families about mathematics learning.
- Continue to build data sets to inform future years' actions.

### Key Actions 2019-20

- Continue revision and extension of previous implementation strategies.
- Continue to build and respond to data sets to inform future years' actions.

### Key Actions 2020-21

- Continue revision and extension of previous implementation strategies.

\*This is the second year of a three-year plan that commenced in 2018-19.

## Accountability Pillar Overall Summary - Oct 2019

Measure Category	Measure	Calgary School Division			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	Safe and Caring	88.0	88.2	89.1	89.0	89.0	89.3	High	Declined Significantly	Issue
Student Learning Opportunities	Program of Studies	82.3	81.8	82.5	82.2	81.8	81.9	Very High	Maintained	Excellent
	Education Quality	88.6	88.2	88.9	90.2	90.0	90.1	High	Declined	Acceptable
	Drop Out Rate	2.3	2.1	2.5	2.6	2.3	2.9	Very High	Improved Significantly	Excellent
	High School Completion Rate (3 yr)	77.4	75.9	75.8	79.1	78.0	77.5	High	Improved Significantly	Good
Student Learning Achievement (Grades K-9)	PAT: Acceptable	77.7	75.4	75.4	73.8	73.6	73.6	Intermediate	Improved Significantly	Good
	PAT: Excellence	23.2	22.2	21.1	20.6	19.9	19.6	High	Improved Significantly	Good
Student Learning Achievement (Grades 10-12)	Diploma: Acceptable	86.6	86.3	85.5	83.6	83.7	83.1	High	Improved Significantly	Good
	Diploma: Excellence	32.2	31.2	29.1	24.0	24.2	22.5	Very High	Improved Significantly	Excellent
	Diploma Exam Participation Rate (4+ Exams)	62.2	61.0	61.3	56.3	55.7	55.1	High	Improved	Good
	Rutherford Scholarship Eligibility Rate	63.7	61.7	61.4	64.8	63.4	62.2	Intermediate	Improved Significantly	Good
Preparation for Lifelong Learning, World of Work, Citizenship	Transition Rate (6 yr)	61.0	60.0	60.3	59.0	58.7	58.7	High	Maintained	Good
	Work Preparation	78.7	78.4	78.9	83.0	82.4	82.6	High	Maintained	Good
	Citizenship	80.5	81.1	82.5	82.9	83.0	83.5	High	Declined Significantly	Issue
Parental Involvement	Parental Involvement	77.9	77.4	78.0	81.3	81.2	81.1	Intermediate	Maintained	Acceptable
Continuous Improvement	School Improvement	78.8	78.2	79.6	81.0	80.3	81.0	High	Declined Significantly	Issue

### 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 | Student participation in the survey was impacted between 2014 and 2017 due to the number of students responding through the OurSCHOOL/TTFM (Tell Them From Me) survey tool.
- 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 6 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 8 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 9 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 10 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 11 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.



## Accountability Pillar: First Nations, Métis and Inuit Overall Summary

### October 2019

Measure Category	Measure	Calgary School Division (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
Safe and Caring Schools	Safe and Caring	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Student Learning Opportunities	Program of Studies	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Education Quality	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Drop Out Rate	5.9	6.2	6.4	5.4	4.8	5.6	Intermediate	Maintained	Acceptable
	High School Completion Rate (3 yr)	40.0	37.8	35.8	56.6	53.3	52.4	Very Low	Improved	Issue
Student Learning Achievement (Grades K-9)	PAT: Acceptable	48.1	43.2	42.3	54.0	51.7	51.9	Very Low	Improved Significantly	Acceptable
	PAT: Excellence	5.8	5.3	5.0	7.4	6.6	6.5	Very Low	Maintained	Concern
Student Learning Achievement (Grades 10-12)	Diploma: Acceptable	83.4	82.1	80.9	77.2	77.1	76.7	Intermediate	Maintained	Acceptable
	Diploma: Excellence	15.9	12.8	14.7	11.4	11.0	10.6	Intermediate	Maintained	Acceptable
	Diploma Exam Participation Rate (4+ Exams)	20.2	17.3	16.0	24.6	24.4	22.3	Very Low	Improved	Issue
	Rutherford Scholarship Eligibility Rate	19.4	17.1	18.0	37.1	35.9	34.0	Very Low	Maintained	Concern
Preparation for Lifelong Learning, World of Work, Citizenship	Transition Rate (6 yr)	25.9	27.1	28.8	34.2	33.0	32.8	Very Low	Maintained	Concern
	Work Preparation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Citizenship	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Parental Involvement	Parental Involvement	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Continuous Improvement	School Improvement	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

#### Notes

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- 2 | Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- 3 | 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 4 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 5 | 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 6 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 7 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 8 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 9 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.

## Outcome One: Alberta's students are successful

Performance Measure	Results (in percentages)					Target	Evaluation			Targets		
	2015	2016	2017	2018	2019		Achievement	Improvement	Overall	2020	2021	2022
Overall percentage of students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (overall cohort results).	74.8	75.5	75.3	75.4	77.7		Intermediate	Improved Significantly	Good			
Overall percentage of students in Grades 6 and 9 who achieved the standard of excellence on Provincial Achievement Tests (overall cohort results).	19.9	20.4	20.6	22.2	23.2		High	Improved Significantly	Good			
Overall percentage of students who achieved the acceptable standard on diploma examinations (overall results).	86.2	85.1	85.0	86.3	86.6		High	Improved Significantly	Good			
Overall percentage of students who achieved the standard of excellence on diploma examinations (overall results).	29.0	27.6	28.6	31.2	32.2		Very High	Improved Significantly	Excellent			

### 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 | 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 4 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 5 | 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 6 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 7 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 8 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.



## Strategies

### **Achievement & Well-Being**

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Further consistency of assessment and reporting by calibrating to a system standard.
  - Use high-impact instructional strategies.
  - Incorporate culturally-responsive instructional design and assessment by honouring Indigenous knowledge systems, languages and histories.
  - Enhance student voice in learning, assessment and decision-making.
- Advance literacy, numeracy and learning competencies that incorporate critical thinking, communication, creativity, collaboration, citizenship and character.
  - Leverage the use of technology in learning environments to meet the needs of diverse learners.

### **Developing our Employees**

- Build the capacity of our employees
  - Provide opportunities for professional learning for our employees.

## Outcome One: Alberta's students are successful (continued)

Performance Measure	Results (in percentages)					Target 2019	Evaluation			Targets		
	2015	2016	2017	2018	2019		Achievement	Improvement	Overall	2020	2021	2022
High School Completion Rate – Percentage of students who completed high school within three years of entering Grade 10.	76.2	75.2	76.4	75.9	77.4		High	Improved Significantly	Good			
Percentage of students writing four or more diploma exams within three years of entering Grade 10.	60.7	61.0	61.9	61.0	62.2		High	Improved	Good			
Drop Out Rate - annual dropout rate of students aged 14 to 18	3.3	2.8	2.7	2.1	2.3		Very High	Improved Significantly	Excellent			
High school to post-secondary transition rate of students within six years of entering Grade 10.	61.3	60.9	60.0	60.0	61.0		High	Maintained	Good			
Percentage of Grade 12 students eligible for a Rutherford Scholarship.	n/a	61.1	61.6	61.7	63.7		Intermediate	Improved Significantly	Good			
Percentage of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.	82.3	83.8	82.7	81.1	80.5		High	Declined Significantly	Issue	81.7	81.8	81.9

### Notes

- 1 | Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
- 2 | Student participation in the survey was impacted between 2014 and 2017 due to the number of students responding through the OurSCHOOL/TTFM (Tell Them From Me) survey tool.
- 3 | Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- 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 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 6 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 7 | 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.
- 8 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.

## Strategies

### **Achievement & Well-Being**

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Further consistency of assessment and reporting by calibrating to a system standard.
  - Use high-impact instructional strategies.
  - Incorporate culturally-responsive instructional design and assessment by honouring Indigenous knowledge systems, languages and histories.
  - Enhance student voice in learning, assessment and decision-making.
- Advance literacy, numeracy and learning competencies that incorporate critical thinking, communication, creativity, collaboration, citizenship and character.
  - Build capacity to support concept-based curriculum and instruction.
  - Leverage the use of technology in learning environments to meet the needs of diverse learners.
- Create conditions for success for each student in a welcoming, caring, respectful and safe learning environment.
  - Continue to develop environments where each student is known and develops a sense of competence, confidence and belonging as a learner.
  - Further develop school environments that foster resiliency in students.
  - Work with partners to provide access to well-being and mental health supports for students.

### **Strategic Allocation of Resources to Support Student Needs**

- Develop a sustainable system-wide plan to optimize, commission, modernize and maintain school facilities to foster enriching learning environments.
  - Develop a sustainable system-wide plan for high schools that continues to offer students access, flexibility and choice in programming given available space and resources

### **Developing our Employees**

- Build the capacity of our employees
  - Provide opportunities for professional learning for our employees.
- Build coherence and continuous improvement in program provision, service delivery and professional learning through a collaborative and evidence-informed culture.

## Outcome Two: Alberta's education system supports First Nations, Métis, and Inuit students' success

Performance Measure	Results (in percentages)					Target	Evaluation			Targets		
	2015	2016	2017	2018	2019	2019	Achievement	Improvement	Overall	2020	2021	2022
Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the acceptable standard on Provincial Achievement Tests (overall cohort results).	42.4	39.6	44.0	43.2	48.1	45.1*	Very Low	Improved Significantly	Acceptable			
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).	3.3	3.2	6.5	5.3	5.8	6.3*	Very Low	Maintained	Concern	7.3	7.4	8.2
Overall percentage of self-identified FNMI students who achieved the acceptable standard on diploma examinations (overall results).	86.6	81.1	79.6	82.1	83.4		Intermediate	Maintained	Acceptable			
Overall percentage of self-identified FNMI students who achieved the standard of excellence on diploma examinations (overall results).	15.7	17.0	14.3	12.8	15.9		Intermediate	Maintained	Acceptable			

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue* or *Concern*.

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 2017-18 AERR; accordingly, a target was set for 2019.

- The target for 2019 was 45.1% and the result for 2019 was 48.1%; The CBE result for this measure increased by 4.9 percentage points between 2018 and 2019, meeting the 2019 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 2017-18 AERR; accordingly, a target was set for 2019.

- The target for 2019 was 6.3% and the result for 2019 was 5.8%; The CBE result for this measure increased by 0.5 percentage points between 2018 and 2019, but did not meet the 2019 target.

### 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 | 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 4 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 5 | 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 6 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 7 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 8 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.

## Strategies

### **Achievement & Well-Being**

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Further consistency of assessment and reporting by calibrating to a system standard.
  - Use high-impact instructional strategies.
  - Incorporate culturally-responsive instructional design and assessment by honouring Indigenous knowledge systems, languages and histories.
  - Enhance student voice in learning, assessment and decision-making.
- Advance literacy, numeracy and learning competencies that incorporate critical thinking, communication, creativity, collaboration, citizenship and character.
  - Leverage the use of technology in learning environments to meet the needs of diverse learners.

### **Developing our Employees**

- Build the capacity of our employees
  - Provide opportunities for professional learning for our employees.

## Outcome Two: Alberta's education system supports First Nations, Métis, and Inuit students' success (continued)

Performance Measure	Results (in percentages)					Target	Evaluation			Targets		
	2014	2015	2016	2017	2018	2019	Achievement	Improvement	Overall	2020	2021	2022
High School Completion Rate – Percentage of self-identified FNMI students who completed high school within three years of entering Grade 10.	35.1	33.2	36.4	37.8	40.0	39.6*	Very Low	Improved	Issue	42.1	43.9	45.9
Percentage of self-identified FNMI students writing four or more diploma exams within three years of entering Grade 10.	16.3	14.2	16.7	17.3	20.2	19.4*	Very Low	Improved	Issue	21.2	22.9	24.9
Drop Out Rate - annual dropout rate of self-identified FNMI students aged 14 to 18	9.0	5.5	7.5	6.2	5.9		Intermediate	Maintained	Acceptable			
High school to post-secondary transition rate of self-identified FNMI students within six years of entering Grade 10.	24.6	25.6	33.8	27.1	25.9	33.0*	Very Low	Maintained	Concern	32.8	32.9	34.2
Percentage of Grade 12 self-identified FNMI students eligible for a Rutherford Scholarship.	n/a	20.3	16.5	17.1	19.4		Very Low	Maintained	Concern	20.1	21.3	22.8

\* The measures in this table only include results up to 2017-18. The "Target 2019" column refers to the result found in the 2018-19 May update not the result for the 2018-19 school year. The target set for 2019 is targeting the 2017-18 results.

\*Alberta Education requires jurisdictions to set targets for any performance measures where the *Overall* evaluation is *Issue* or *Concern*.

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 2017-18 AERR; accordingly, a target was set.

- The target set for 2019 was 39.6, which would represent an increase of 1.8 percentage points over the 2018 result of 37.8%. The 2018 CBE result of 40.0% met the target.

Percentage of self-identified FNMI students writing four or more diploma exams within three years of entering Grade 10 was a *Concern* in the 2017-18 AERR; accordingly, a target was set.

- The target set 2018 was 19.4%, which would represent an increase of 2.1 percentage points over the 2017 result of 17.3%. The 2018 CBE result of 20.2% met the target.

High school to post-secondary transition rate of self-identified FNMI students within six years of entering Grade 10 was a *Concern* in the 2017-18 AERR; accordingly, a target was set.

- The target set 2018 was 33.0%, which would represent an increase of 5.9 percentage points over the 2017 result of 27.1%. The 2018 CBE result of 25.9% did not meet the target.

### Notes

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- 2 | Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- 3 | 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.
- 4 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 5 | 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.
- 6 | Student demographic data used when calculating Student Outcome Measures and Provincial Achievement Tests results was updated in October 2016. This impacted results based on enrolment (e.g., self-identified First Nations, Métis and Inuit), exception (e.g., learning disability) and grant program codes (e.g., English as Second Language students) reported in previous years.
- 7 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.

## Strategies

### Achievement & Well-Being

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Further consistency of assessment and reporting by calibrating to a system standard.
  - Use high-impact instructional strategies.
  - Incorporate culturally-responsive instructional design and assessment by honouring Indigenous knowledge systems, languages and histories.
  - Enhance student voice in learning, assessment and decision-making.
- Advance literacy, numeracy and learning competencies that incorporate critical thinking, communication, creativity, collaboration, citizenship and character.
  - Build capacity to support concept-based curriculum and instruction.
  - Leverage the use of technology in learning environments to meet the needs of diverse learners.
- Create conditions for success for each student in a welcoming, caring, respectful and safe learning environment.
  - Continue to develop environments where student is known and develops a sense of competence, confidence and belonging as a learner.
  - Further develop school environments that foster resiliency in students.
  - Work with partners to provide access to well-being and mental health supports for students.

### Strategic Allocation of Resources to Support Student Needs

- Develop a sustainable system-wide plan to optimize, commission, modernize and maintain school facilities to foster enriching learning environments.
  - Develop a sustainable system-wide plan for high schools that continues to offer students access, flexibility and choice in programming given available space and resources

### Developing our Employees

- Build the capacity of our employees
  - Provide opportunities for professional learning for our employees.
- Build coherence and continuous improvement in program provision, service delivery and professional learning through a collaborative and evidence-informed culture.

## Outcome Three: Alberta's education system respects diversity and promotes inclusivity

Performance Measure	Results (in percentages)					Target 2019	Evaluation			Targets		
	2015	2016	2017	2018	2019		Achievement	Improvement	Overall	2020	2021	2022
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.	81.1	83.2	82.4	81.8	82.3		Very High	Maintained	Excellent			

### Notes |

- 1 | Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
- 2 | Student participation in the survey was impacted between 2014 and 2017 due to the number of students responding through the OurSCHOOL/TTFM (Tell Them From Me) survey tool.

## Strategies

### Achievement & Well-Being

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Enhance student voice in learning, assessment and decision-making.

### Organizational Effectiveness & Service Transformation

- Communicate and engage our students, staff, families and communities to support effective decision-making.
  - Utilize the *Dialogue Framework* to support community engagement activities.

### Strategic Allocation of Resources to Support Student Needs

- Allocate human and financial resources based on student needs.
  - Allocate resources based on need to support students with equitable access to programs and services across the system.
- Develop a sustainable system-wide plan to optimize, commission, modernize and maintain school facilities to foster enriching learning environments.
  - Develop a sustainable system-wide plan for high schools that continues to offer students access, flexibility and choice in programming given available space and resources.

### Developing our Employees

- Build the capacity of our employees
  - Provide opportunities for professional learning for our employees.



## Outcome Four: Alberta's K-12 education system is well governed and managed

Performance Measure	Results (in percentages)					Target 2019	Evaluation			Targets		
	2015	2016	2017	2018	2019		Achievement	Improvement	Overall	2020	2021	2022
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.	88.2	89.8	89.3	88.2	88.0		High	Declined Significantly	Issue	88.8	88.9	89.0
Percentage of teachers, parents and students satisfied with the overall quality of basic education.	87.6	89.4	89.0	88.2	88.6	88.9*	High	Declined	Acceptable			
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.	78.2	79.3	78.9	78.4	78.7		High	Maintained	Good			
Percentage of teacher and parent satisfaction that students demonstrate the knowledge, skills and attitudes necessary for lifelong learning.	65.8	69.1	68.5	68.1	68.2		n/a	n/a	n/a			
Percentage of teachers and parents satisfied with parental involvement in decisions about their child's education.	77.2	78.4	78.3	77.4	77.9		Intermediate	Maintained	Acceptable			
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.	75.6	80.4	80.1	78.2	78.8		High	Declined Significantly	Issue	79.4	79.5	79.6

\*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 satisfied with the overall quality of basic education was an *Issue* in the 2017-18 AERR; accordingly, a target was set for 2019.

- The target for 2019 was 88.9% and the result for 2019 was 88.6%; The CBE result for this measure increased by 0.4 percentage points between 2018 and 2019, but did not meet the 2019 target.

### Notes |

- 1 | Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
- 2 | Student participation in the survey was impacted between 2014 and 2017 due to the number of students responding through the OurSCHOOL/TTFM (Tell Them From Me) survey tool.

## Strategies

### Achievement & Well-Being

- Improve student achievement through the design of inclusive, engaging and rigorous learning tasks.
  - Enhance student voice in learning, assessment and decision-making.
- Create conditions for success for each student in a welcoming, caring, respectful and safe learning environment.
  - Continue to develop environments where each student is known and develops a sense of competence, confidence and belonging as a learner.
  - Further develop school environments that foster resiliency in students.
  - Work with partners to provide access to well-being and mental health supports for students.

### Organizational Effectiveness & Service Transformation

- Communicate and engage our students, staff, families and communities to support effective decision-making.
  - Utilize the *Dialogue Framework* to support community engagement activities.
  - Communicate decisions effectively.

### Strategic Allocation of Resources to Support Student Needs

- Allocate human and financial resources based on student needs.
  - Align resource allocation with the new funding framework and system priorities and equity goals.
  - Allocate resources based on need to support students with equitable access to programs and services across the system.
- Develop a sustainable system-wide plan to optimize, commission, modernize and maintain school facilities to foster enriching learning environments.
  - Develop a sustainable system-wide plan for high schools that continues to offer students access, flexibility and choice in programming given available space and resources.
  - Promote system-wide approaches to environmental sustainability.

## Summary of Financial Results for 2018-19

### Financial Results Summary 2018-19

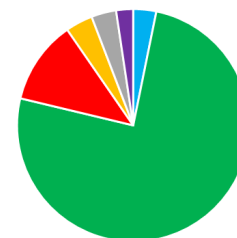
The Calgary Board of Education (CBE) is the public school board in Calgary, Alberta, Canada, and is one of the best public education systems in the world. From Early Childhood Services (ECS) to Grade 12, the CBE operates a wide variety of programs and services to support each and every student. Outstanding education depends on making wise decisions about how to invest public resources on behalf of the over 123,000 students. It is an important responsibility. Money spent educating today's youth is one of the most important investments a society can make in its future.

The CBE works with students, families, communities, Alberta Education and employees to build positive learning and working environments. The Board of Trustees' policies, the CBE Three-Year Education Plan and the direction set by Alberta Education, guide our work.

### Operating Highlights

	\$000's		\$000's	
	2018-19	%	2017-18	%
<b>Revenues</b>				
Government of Alberta	1,288,251	93%	1,266,172	93%
All Other Revenues	96,464	7%	96,975	7%
	<u>1,384,715</u>	<u>100%</u>	<u>1,363,147</u>	<u>100%</u>
<b>Expenditures</b>				
Instruction: ECS	44,354	3.2%	52,780	3.9%
Instruction: grades 1-12	1,048,639	75.5%	1,024,638	75.1%
Plant operations and maintenance	161,616	11.6%	157,312	11.5%
Transportation	52,632	3.8%	49,605	3.6%
Board and System Administration	48,054	3.5%	47,247	3.5%
External Services	32,898	2.4%	33,617	2.5%
	<u>1,388,193</u>	<u>100.0%</u>	<u>1,365,199</u>	<u>100.0%</u>
<b>Deficit</b>	<u>(3,478)</u>		<u>(2,052)</u>	

Actual Expenditures 2018-19



The 2018-19 deficit of \$3.5 million is \$1.4 million higher than the prior year deficit of \$2.1 million. Highlights in the year include:

- An increase in enrolment. Funding rates remained steady to prior year, but with an increase in the number of students, overall funding increased.
- The number of staff to provide instruction and support students have also increased.
- The government has provided the same funding with Bill 1, including the Fee Replacement Grant for Instructional Supplies and Material, as well as Transportation Fees.
- Classroom Improvement Funding remained consistent with prior year. This was channeled into student learning by increasing FTEs to support student learning.
- In 2017-18 Administration projected operational and capital project funding requirements and deemed it prudent to convert equity and bond investments into cash. This strategy has not been repeated in 2018-19, resulting in lower investment income compared to prior year.

## Capital Highlights

Total additions to tangible capitals assets were \$82.4 million in 2018-19 which are largely comprised of:

- \$20.1 million in Construction and modular funding from Alberta Infrastructure.
- \$34.2 million in board funded capital activities such as school commissioning, technology infrastructure upgrades, technology hardware purchases.
- \$23.5 million in IMR capital projects were completed at various schools

## Reserves Highlights

	<b>Reserves balance Sept 1, 2018</b>	<b>2018-19 proposed used of reserves</b>	<b>Reserves balance Aug 31, 2019</b>
	(in \$ thousands)		
Total operating reserves	25,977	<b>(2,983)</b>	22,994
Total capital reserves	24,200	<b>(8,313)</b>	15,887
<b>Total reserves</b>	<b>50,177</b>	<b>(11,296)</b>	<b>38,881</b>

Draws from reserves included:

- \$3.0 million from operating reserves based on actual operating results.
- \$8.3 million from capital reserves to fund ongoing projects as well as commissioning new schools and support for a solar power project.

## Financial Position Highlights

As at Aug. 31, 2019 the CBE has an accumulated surplus balance of \$210.6 million (2018 - \$213.9 million), reflecting net financial debt of \$1,123.6 million and non-financial assets of \$1,334.1 million. Net debt includes \$1,172.1 million of unearned revenue from Government funding spent on the construction of capital assets. That revenue is recognized and brought into income over the useful life of the related assets.

More information on the audited financial statements and supplemental Management Discussion and Analysis is available on the CBE's website at:

[2018-2019 Financial Results](#)

## Budget Summary 2019-20

The CBE's values, set out below, guide Administration's approach to the budget:

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

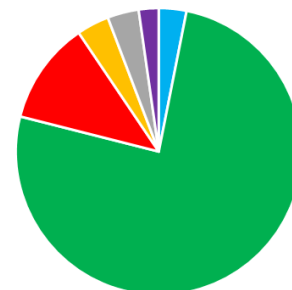
The Budget Report for 2019-20 was prepared using a consultative process and focused resources on achieving the vision as articulated in the CBE values, the Three-Year Education Plan and guidance from Alberta Education.

This budget charts a path that aligns with the CBE's values while balancing against available resources.

### Operating Highlights

	\$000's	
	2019-20	%
<b>Revenues</b>		
Government of Alberta	1,255,088	93%
All Other Revenues	91,185	7%
	<u>1,346,273</u>	<u>100%</u>
<b>Expenditures</b>		
Instruction: ECS	43,078	3.1%
Instruction: grades 1-12	1,046,698	75.8%
Plant operations and maintenanc	160,063	11.6%
Transportation	50,537	3.7%
Board and System Administrator	48,951	3.5%
External Services	31,223	2.3%
	<u>1,380,550</u>	<u>100.0%</u>
<b>Deficit</b>	<u>(34,277)</u>	

Budget Expenditures 2019-20



- Revenues are lower than 2018-19 due primarily to a reduction in funding from the elimination of the Fee Replacement Grant, Class Size Initiative and Classroom Improvement Funding totalling \$85 million. This was offset by a one-time \$24 million transition grant and enrolment growth funding of \$29 million, for a net decrease in funding of \$32 million.
- For the 2019-20 school year only, the Minister of Education advised that school boards have the ability to repurpose the operating portion of the Infrastructure Maintenance and Renewal (IMR) grant to support classroom, or school-based, certificated and non-certificated staffing costs. The CBE requested and received ministerial approval on Dec. 2, 2019 to access this additional flexibility in the amount of \$15 million. This budget reflects the use of these funds to maintain temporary teachers in classrooms and offset the reduction in the transportation portion of the Fee Replacement Grant.
- Service units reflect a total reduction of \$7 million as part of the overall balancing strategy.

## Capital Highlights

- Board funded capital dollars are drawn from Alberta Education grant funding as there is no specific grant from Alberta Education for these acquisitions.
- This budget incorporates a reduction to board funded capital spending plans of \$10 million as part of the operating balancing strategy.
- The remaining board funded capital allocation will be used to support necessary capital acquisitions based on health, safety, legal compliance or future cost savings criteria.
- The capital portion of IMR will continue as planned notwithstanding the repurposing of the operating portion noted in the Operating Highlights.

## Reserves Highlights

- Unrestricted operating reserves are budgeted to be \$4.2 million by Aug. 31, 2020 after drawing on over \$10 million to fund the operating funding gap and \$6.8 million to fund projects carried forward from 2018-19.
- Capital reserves are budgeted to be \$10.4 million by Aug 31, 2020 after drawing \$5.4 million to fund to fund projects carried forward from 2018-19.
- The remaining capital reserves are planned to be used for new school commissioning costs in future years.

More information on the 2019-20 budget is available on the CBE's website at:

[Budget and Financial Information.](#)

## Summary of Facility & Capital Plans 2018-19

Calgary has experienced varying levels of population growth over the past decade. Calgary's population has increased by 90 517 persons in the last five years, an average of 18 103 persons per year. The current population is 1 285 711 people (2019 City Census). The City of Calgary's *Suburban Residential Growth 2019-2023* indicates there are 27 actively developing communities in new suburban areas at various stages of build out.

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 2020-23 was approved on March 12, 2019 by the Board of Trustees and can be found under Supporting Documents on the > Schools > Building & Modernizing Schools > Criteria for School Capital Planning Priorities page on the CBE Website or at <https://www.cbe.ab.ca/FormsManuals/Three-Year-School-Capital-Plan.pdf>

## Enrolment Program Overview

In the 2019-20 school year the Calgary Board of Education will provide programs and services in 246 schools, addressing the complexity and diversity of a population of 125 809 students

<b>Type and Number of Schools<sup>1</sup> 2019-20</b>	
Elementary	143
Elementary Junior or Middle	51
Junior	11
Junior Senior	4
Senior	21
Elementary Junior Senior <sup>2</sup>	1
Unique Settings including Discovering Choices Outreach at four locations	15
<b>Total</b>	<b>246</b>
<sup>1</sup> School is defined as an instructional setting with a unique school code assigned by Alberta Education.	
<sup>2</sup> Home Education	

<b>Student Enrolment as of Sept. 30, 2019</b>	
Early Learning	215
Kindergarten	9 030
Grades 1 to 3	28 972
Grades 4 to 6	28 626
Grades 7 to 9	26 696
Grades 10 to 12	27 988
CBe-Learn <sup>1</sup>	541
Chinook Learning Services <sup>1</sup>	1 124
Home Education	209
Outreach Programs	1 437
Unique Settings	971
<b>Total Enrolment</b>	<b>125 809</b>
<sup>1</sup> 215 students are over 20 years old.	

<b>CBE Actual Employee Count<sup>1</sup> 2018-19</b>	
Certificated	6 838.1
Non-certificated	3 440.7
<b>Total</b>	<b>10 278.8</b>
<sup>1</sup> Reported as Full-Time Equivalents as of Sept. 30, 2018	



## 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.

### Settings and Programs Providing Specialized Services and Supports

- Children's Village School
- Christine Meikle School
- Discovering Choices Outreach
- Dr. Gordon Townsend School
- Dr. Oakley School
- Emily Follensbee School
- HERA Program
- Nexus
- Transitions
- West View School
- William Roper Hull School
- Wood's Homes Schools
  - George Wood Learning Centre
  - William Taylor Learning Centre

### Sports-Supported Learning Opportunities

- National Sport School
- High Performance Athlete Development (HPAD) Pathway

### Specialized School-Based Programming

- Autism Spectrum Disorder
- Behaviour
- Blind and Visually Impaired
- Complex Needs
- Deaf and Hard of Hearing
- Developmental Disabilities
- Early Development Pre-School
- English Language Learning
- Gifted and Talented
- Learning Disability
- Mental Health

### Pathway Categories and Programs

- Dual Credit Program
- Exploratory Program
- Internships
- Registered Apprenticeship Programs (RAP)

### CBE-Supported Community-Based Programming

- Adolescent Day Treatment Program (ADTP)
- Adolescent Mental Health Services (Units 23, 26, 56A)
- Alberta Adolescent Recovery Centre (AARC)
- Calgary Youth Attendance Centre (CYAC)
- Children's Day Treatment
- Emergency Women's Shelter
- Enviro Wilderness Base Camp
- ExCel

### Alternative Programs

#### Content Program Focus

- Arts-Centred Learning
- Science School

#### Teaching Philosophy Programs

- Alice Jamieson Girls' Academy
- All Boys Alternative Program
- Montessori Program
- Traditional Learning Centres

#### Language And Culture Programs

- Indigenous Culture Program:
  - Medicine Wheel Kindergarten
  - Niitsitapi Learning Centre
  - Piitoayis Family School
- French Immersion (Early and Late) Program
- German Bilingual Program
- Mandarin Bilingual Program
- 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 - 71.45	71.45 - 78.34	78.34 - 84.76	84.76 - 87.95	87.95 - 100.00
Diploma: Excellence	0.00 - 9.55	9.55 - 12.59	12.59 - 19.38	19.38 - 23.20	23.20 - 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
Rutherford Scholarship Eligibility Rate	0.00 - 47.98	47.98 - 55.78	55.78 - 68.95	68.95 - 74.96	74.96 - 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 - October 2019 - Province

Measure Category	Measure	Alberta			Measure Evaluation		
		Current Result	Prev Year Result	Prev 3 Year Average	Achievement	Improvement	Overall
Safe and Caring Schools	<a href="#">Safe and Caring</a>	89.0	89.0	89.3	Very High	Declined Significantly	Acceptable
	<a href="#">Program of Studies</a>	82.2	81.8	81.9	Very High	Improved Significantly	Excellent
Student Learning Opportunities	<a href="#">Education Quality</a>	90.2	90.0	90.1	Very High	Improved	Excellent
	<a href="#">Drop Out Rate</a>	2.6	2.3	2.9	Very High	Improved Significantly	Excellent
	<a href="#">High School Completion Rate (3 yr)</a>	79.1	78.0	77.5	High	Improved Significantly	Good
Student Learning Achievement (Grades K-9)	<a href="#">PAT: Acceptable</a>	73.8	73.6	73.6	Intermediate	Improved	Good
	<a href="#">PAT: Excellence</a>	20.6	19.9	19.6	High	Improved Significantly	Good
	<a href="#">Diploma: Acceptable</a>	83.6	83.7	83.1	Intermediate	Improved Significantly	Good
Student Learning Achievement (Grades 10-12)	<a href="#">Diploma: Excellence</a>	24.0	24.2	22.5	Very High	Improved Significantly	Excellent
	<a href="#">Diploma Exam Participation Rate (4+ Exams)</a>	56.3	55.7	55.1	High	Improved Significantly	Good
	<a href="#">Rutherford Scholarship Eligibility Rate</a>	64.8	63.4	62.2	Intermediate	Improved Significantly	Good
	<a href="#">Transition Rate (6 yr)</a>	59.0	58.7	58.7	High	Maintained	Good
Preparation for Lifelong Learning, World of Work, Citizenship	<a href="#">Work Preparation</a>	83.0	82.4	82.6	High	Improved	Good
	<a href="#">Citizenship</a>	82.9	83.0	83.5	Very High	Declined Significantly	Acceptable
Parental Involvement	<a href="#">Parental Involvement</a>	81.3	81.2	81.1	High	Maintained	Good
Continuous Improvement	<a href="#">School Improvement</a>	81.0	80.3	81.0	Very High	Maintained	Excellent

### 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 | Student participation in the survey was impacted between 2014 and 2017 due to the number of students responding through the OurSCHOOL/TTFM (Tell Them From Me) survey tool.
- 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 6 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 8 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 9 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 10 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 11 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.

## Accountability Pillar: First Nations, Métis and Inuit Overall Summary - October 2019 - Province

Measure Category	Measure	Alberta (FNMI)			Measure Evaluation		
		Current Result	Prev Year Result	Prev 3 Year Average	Achievement	Improvement	Overall
Safe and Caring Schools	<a href="#">Safe and Caring</a>	n/a	n/a	n/a	n/a	n/a	n/a
	<a href="#">Program of Studies</a>	n/a	n/a	n/a	n/a	n/a	n/a
Student Learning Opportunities	<a href="#">Education Quality</a>	n/a	n/a	n/a	n/a	n/a	n/a
	<a href="#">Drop Out Rate</a>	5.4	4.8	5.6	Intermediate	Maintained	Acceptable
	<a href="#">High School Completion Rate (3 yr)</a>	56.6	53.3	52.4	Very Low	Improved Significantly	Acceptable
Student Learning Achievement (Grades K-9)	<a href="#">PAT: Acceptable</a>	54.0	51.7	51.9	Very Low	Improved Significantly	Acceptable
	<a href="#">PAT: Excellence</a>	7.4	6.6	6.5	Very Low	Improved Significantly	Acceptable
Student Learning Achievement (Grades 10-12)	<a href="#">Diploma: Acceptable</a>	77.2	77.1	76.7	Low	Maintained	Issue
	<a href="#">Diploma: Excellence</a>	11.4	11.0	10.6	Low	Maintained	Issue
	<a href="#">Diploma Exam Participation Rate (4+ Exams)</a>	24.6	24.4	22.3	Very Low	Improved Significantly	Acceptable
	<a href="#">Rutherford Scholarship Eligibility Rate</a>	37.1	35.9	34.0	Very Low	Improved Significantly	Acceptable
	<a href="#">Transition Rate (8 yr)</a>	34.2	33.0	32.8	Very Low	Improved	Issue
Preparation for Lifelong Learning, World of Work, Citizenship	<a href="#">Work Preparation</a>	n/a	n/a	n/a	n/a	n/a	n/a
	<a href="#">Citizenship</a>	n/a	n/a	n/a	n/a	n/a	n/a
Parental Involvement	<a href="#">Parental Involvement</a>	n/a	n/a	n/a	n/a	n/a	n/a
Continuous Improvement	<a href="#">School Improvement</a>	n/a	n/a	n/a	n/a	n/a	n/a

### 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 | 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 K&E); French Language Arts (6e et 9e année); Mathematics (Grades 6, 9, 9 K&E); Science (Grades 6, 9, 9 K&E); and Social Studies (Grades 6, 9, 9 K&E).
- 4 | Participation in Provincial Achievement Tests was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 5 | 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; Mathematics 30-1; Mathematics 30-2; Chemistry 30; Physics 30; Biology 30; Science 30; Social Studies 30-1; and Social Studies 30-2.
- 6 | Caution should be used when interpreting evaluations and results over time for Mathematics 30-1/30-2, as equating was not in place until the 2016/17 school year. Alberta Education does not comment on province wide trends until it has five years of equated examination data.
- 7 | Participation in Diploma Examinations was impacted by the fires in May to June 2016 and May to June 2019. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- 8 | Weighting of school-awarded marks in diploma courses increased from 50% to 70% in the 2015/16 school year. Caution should be used when interpreting trends over time.
- 9 | 2016 results for the 3-year High School Completion and Diploma Examination Participation Rates have been adjusted to reflect the correction of the Grade 10 cohort.

## report to Board of Trustees

## Fall 2019 Update to the 2019-20 Budget and First Quarter Budget Variance Report

Date	January 7, 2020
Meeting Type	Regular Meeting, Public Agenda
To	Board of Trustees
From	Christopher Usih Chief Superintendent of Schools
Purpose	Decision & Information
Originator	Brad Grundy, Superintendent, Chief Financial Officer and Corporate Treasurer
Governance Policy Reference	Operational Expectations OE-5: Financial Planning
Resource Person(s)	Ed Sutlic, Director, Corporate Finance Tanya Scanga, Manager, Corporate Planning and Reporting Nathalya Lu, Lead, Corporate Budgets

### 1 | Recommendation

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It is recommended:

- THAT the Board of Trustees approves the Fall 2019 Update to the 2019-20 Budget, reflecting total planned spending of \$1,380.5 million, a decrease of \$28.5 million from the 2019-20 Budget, and authorizes the Fall 2019 Update submission to Alberta Education.
- THAT the Board of Trustees approves the planned 2019-20 use of reserves for a total of \$24.2 million.



## 2 | Issue

Operational Expectations OE-5: Financial Planning requires that quarterly variance reports are prepared and provide explanations for variances in excess of 1% and \$500,000. This report serves as the first quarter report for the 2019-20 fiscal year.

Alberta Education requires a Fall 2019-20 Budget Update (Fall Budget Update) to the 2019-20 Budget, which was approved by the Board of Trustees on June 25, 2019. This budget update includes the implementation of strategies to reflect changes related to enrolment growth and the \$32 million decrease in Alberta Education funding included in the Government of Alberta provincial budget announced October 24, 2019. Specifically, the Fall Budget Update includes the repurposing of \$15 million of Infrastructure Maintenance and Renewal (IMR) grant funding to support certificated and non-certificated classroom based staff and to moderate the levying of fees related to student transportation.

Note: Alberta Education has extended the Fall Budget Update deadline from November 30, 2019 to January 6, 2020.

## 3 | Background

The following summarizes a timeline of events and reports provided through the 2019-20 budget cycle:

Date	Event
Spring	Spring Budget developed assuming funding would be maintained at 2018-19 levels irrespective of enrolment growth and inflationary pressures.
June 25, 2019	Board approves the <a href="#">Budget Report</a> and subsequently submitted to Alberta Education. The budget was balanced as required by Alberta Education.
Sept. 30, 2019	Enrolment numbers confirmed for 2019-20 year. Enrolment growth was 2,390 students. The enrolment number on September 30 drives funding received from Alberta Education. Funding is deployed to schools via the <a href="#">Resource Allocation Method (RAM)</a> .
Oct. 24, 2019	Government of Alberta issues provincial budget. That budget imposed a \$32 million, mid-year revenue reduction.
Nov. 14, 2019	Updated <a href="#">Budget Assumptions Report</a> provided to the Board addressing the funding decrease from 2018-19 levels.
Nov. 27, 2019	Minister of Education announced one-time exception for school boards to repurpose Infrastructure Maintenance and Renewal (IMR) grant funding to support certificated and non-certificated positions in schools.
Dec. 2, 2019	The CBE receives Ministerial approval to repurpose \$15M of IMR grant funding to maintain school based positions and moderate a projected transportation deficit.
Dec.10, 2019	Updated Budget Assumptions Report – Fall Update II (Attachment X) presented to Board.
Jan. 7, 2020	First Quarter Fall Update presented to Board for decision If approved by the Board of Trustees, Attachment XIII will be submitted to Alberta Education.



Alberta Education requires an update to the 2019-20 Budget Report which includes a revised estimate of funding, expenditures, number of students eligible for provincial funding and an estimate of full-time equivalent staff positions (FTEs). This is the Fall Budget Update to the 2019-20 Budget shown in Attachment XIII. It is important to note that the FTEs are based on estimated resource deployment by school principals. Actual FTEs and amounts spent on salaries and benefits will vary based on individual school based decisions and fluctuate throughout the year.

Included in this report is the first quarter budget variance report in Attachment I, the first quarter planned spending by schools and service units in Attachment II, the first quarter planned use of reserves in Attachment III and the first quarter capital budget report in Attachment IV. These attachments are prepared specifically for the Board of Trustees and vary slightly in presentation from the Fall Budget Update which is prepared in the format provided by Alberta Education in Attachment XIII.

## 4 | Analysis

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**Note: As this is an update to the 2019-20 budget, all comparisons, unless otherwise noted, are between the 2019-20 Budget Report and this update to that report.**

The 2019-20 First Quarter Budget Variance Report (Attachment I) and Fall 2019 Update to the 2019-20 Budget (Attachment XIII) typically reflects the budget impacts of changes in student enrolment from estimates in the spring to actuals on September 30. Assumptions made in the spring budget needed to be revised based on the Government of Alberta provincial budget received October 24, 2019. The strategies included in Budget Assumptions Report – Fall Update II (Attachment X) have also been included in addition to the change in enrolment to achieve a balanced budget.

Explanations have been provided below for forecasted changes to the budgeted revenues and expenses, reserve transfers and capital transactions, if any. In support of Operational Expectation 5: Financial Planning, the following summarizes individual line item changes in the financial result for variances above 1% and \$500,000.

### Operating deficit

The planned deficit for the year is \$34.3 million. This is \$19.7 million higher than the Budget Report for 2019-20. The following strategies, as discussed in the Budget Assumptions Report – Fall Update II, have been incorporated into the Fall Budget: Deploying central and Area office staff to schools; funding and staffing reductions for service units; reducing board funded capital spending; levying a transportation fee on some transportation users; and using operating and capital reserves. Prior to the use of reserves, the financial results are as follows:

Revenues were budgeted at \$1,394.4 million and came in \$48.1 million (4 per cent) lower at \$1,346.3 million. Contributions to this decrease include:

- Alberta Education funding has decreased by a total of \$53.5 million. This is a result of:
- \$37.2 million decrease in base funding
- \$1.2 million increase in differential funding
- \$8.2 million decrease in transportation funding
- \$5.5 million decrease in IMR funding
- \$3.6 million decrease flow through ATRF funding



- Fees have increased by \$3.6 million for Transportation (\$2.5 million) and Noon Supervision (\$1.1 million) as outlined in Attachment V and VI.
- \$1.7 million of investment income, due to increase interest rate forecast.

Expenses were budgeted at \$1,409.0 million and came in \$28.5 million (2.0 per cent) lower at \$1,380.5 million. Contributions to this decrease include:

- A decrease in service units of between 2%-5% to achieve approximately \$4 million in savings in addition to the \$3 million in reductions imposed under the spring budget.
- A net decrease of approximately \$18.7 million from amounts allocated to schools is due to a \$23.5 decrease to school allocations, \$3.6 million decrease from ATRF and \$1.6 million net reduction in other programs and related costs. This is offset with an increase of \$10.0 million of reallocated IMR funding to support maintaining teachers in schools and increased costs associated with contract negotiations.
- For the 2019-20 school year only, the Minister of Education advised that school boards have the ability to repurpose the operating portion of the Infrastructure Maintenance and Renewal (IMR) grant to support classroom, or school-based, certificated and non-certificated staffing costs. The CBE requested and received ministerial approval on December 2, 2019 to access this additional flexibility in the amount of \$15 million. This budget reflects the use of these funds to maintain temporary teachers in classrooms and offset the reduction in the transportation portion of the Fee Replacement Grant.
- Planned spending by schools and service units is provided in Attachment II with explanations of significant variances from the 2019-20 Budget.
- Expenses have increased for Transportation (\$1.9 million) and External Services – Noon Supervision (\$1.0 million) as outlined in Attachment V and VI.

### **Capital activities**

The ability to develop or acquire capital assets have decreased by \$6.2 million. Included in the \$18.2 million planned expenditures is \$5.5 million in Board approved projects carried forward from 2018-19 as they were not yet complete. This is reflected as an increase in the transfer from capital carryforwards. As reflected in the strategies to balance the budget, a decrease in board funded capital expenditures of \$10 million was used to assist in balancing the budget.

Amortization for board-funded assets decreased by \$1.2 million. Actual amounts of assets ready for use were lower than estimated and result in reduced amortization expense in 2019-20.

- See Attachment IV for details on Capital

### **Use of reserves and balancing**

The transfer from operating reserves show the planned use of \$18.8 million of operating reserves and \$5.5 million of capital reserves. A decrease in Board funded capital expenditures of \$10 million will also fund a portion of the \$34.3 million operating deficit and capital activities.

- See Attachment III for details on planned use of reserves

Reductions to funding and planned expenditures required a range of strategies to be employed to balance the budget. The CBE will adapt and continue to be guided and informed by its values. The Fall 2019 Update to the 2019-20 Budget will be submitted to Alberta Education by January 7, 2020, following Board of Trustees consideration.



CHRISTOPHER USIH  
CHIEF SUPERINTENDENT OF SCHOOLS

Attachments

- Attachment I: 2019-20 first quarter budget variance report
- Attachment II: 2019-20 first quarter planned spending by schools and service units
- Attachment III: 2019-20 first quarter planned use of reserves
- Attachment IV: 2019-20 first quarter capital budget report
- Attachment V: Transportation Fees
- Attachment VI: Noon Supervision Fees
- Attachment VII: Per Student Funding with Inflation
- Attachment VIII: Enrolment History
- Attachment IX: Dividing the Dollar
- Attachment X: Budget Assumptions Report - Fall Update II
- Attachment XI: Account/ Block Descriptions
- Attachment XII: Staffing
- Attachment XIII: Fall 2019 Update to the 2019-20 Budget

**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.

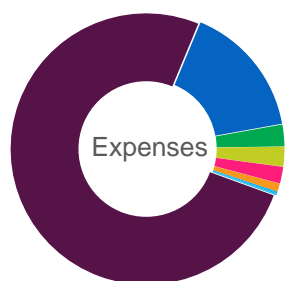
Board/Chief Superintendent Relationship: The Board defined in policy how authority is delegated to its only point of connection – the Chief Superintendent – and how the Chief Superintendent's performance will be evaluated.

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.

	<b>Fall Budget 2019-20</b>	<b>Budget 2019-20</b>	<b>Increase / (Decrease)</b>
	<b>(in \$000s)</b>		
<b>Revenues</b>			
Alberta Education	1,255,088	1,308,550	(53,462)
Other Government of Alberta	124	124	-
Fees	49,157	45,553	3,603
Other sales and services	20,298	20,093	206
All other revenue	15,216	15,256	(40)
Federal Government and First Nations	2,990	3,141	(151)
Investment income	3,401	1,682	1,719
	<b>1,346,273</b>	<b>1,394,399</b>	<b>(48,125)</b>
<b>Expenses by block</b>			
Instruction - Early Childhood Services	43,078	43,048	30
Instruction - Grades 1-12	1,046,698	1,066,855	(20,157)
Plant operations and maintenance	160,063	171,377	(11,314)
Transportation	50,537	48,610	1,927
Board & system administration	48,951	48,975	(23)
External services	31,223	30,141	1,082
	<b>1,380,550</b>	<b>1,409,006</b>	<b>(28,456)</b>
<b>Annual deficit</b>	<b>(34,277)</b>	<b>(14,607)</b>	<b>(19,669)</b>
<b>Transfer from / (to) operating reserves</b>	<b>18,799</b>	<b>9,607</b>	<b>9,192</b>
<b>Add / (deduct) capital items paid by operating funds</b>			
Board funded amortization	28,161	29,312	(1,151)
Capital assets acquired	(18,161)	(24,312)	6,151
Transfer from capital reserves	5,478	-	5,478
	<b>15,478</b>	<b>5,000</b>	<b>10,478</b>
<b>Costs to be reduced / efficiencies to identify</b>	<b>-</b>	<b>-</b>	<b>-</b>

## Attachment II: 2019-20 first quarter planned spending by schools and service units



	2019-20 FTEs	Salaries & Benefits	Supplies & Services	Other	Fall Budget 2019-20	Budget 2019-20	Increase/ (Decrease)	
	in \$000s					\$000s	\$000s	%
Schools & Areas	9,359	974,040	75,600	50	1,049,690	1,068,312	(18,622)	(1.8%)
Service Unit System Budgets	16	11,427	129,947	71,362	212,736	221,064	(8,328)	(3.9%)
School Improvement	230	31,210	4,552	206	35,968	37,557	(1,589)	(4.4%)
Facilities and Environmental Services	205	21,694	8,312	2,876	32,882	33,347	(465)	(1.4%)
Finance and Technology Services	187	23,374	1,025	5,139	29,538	28,162	1,376	4.7%
Human Resources	103	11,809	1,662	45	13,516	13,731	(215)	(1.6%)
Communications & Engagement	20	2,348	45	-	2,393	2,516	(123)	(5.1%)
General Counsel	11	1,522	91	21	1,634	1,649	(14)	(0.9%)
Chief Superintendent	3	559	242	-	801	1,176	(375)	(46.8%)
Board of Trustees	-	424	969	-	1,393	1,493	(100)	(7.2%)
<b>Total</b>	<b>10,135</b>	<b>1,078,407</b>	<b>222,445</b>	<b>79,698</b>	<b>1,380,550</b>	<b>1,409,006</b>	<b>(28,456)</b>	<b>(2.1%)</b>

- The chart provides additional information as to the planned spending by schools, Areas, and service units. Expense and FTE details are provided by major expense category and operating unit.
- Significant changes from the 2019-20 Budget are further explained on the individual schools, Areas and service unit variance reports following this chart.

## Schools and Areas

CBE schools are organized into seven Areas, each with two Education Directors. 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 to ensure directions for principals and schools across the system are aligned. Areas have a budget of approximately \$3.0 million and provide daily support to an average of 35 schools. Within those amounts, Areas have contingency funds available of approximately \$428 thousand (on average) to support the unique needs of the schools within each area.

Directors who were previously located centrally and focused solely on central portfolios, have been redeployed to work in Areas and provide more direct support to schools. In addition to school support, each Education director oversees a specific portfolio which include:

- Alternative Programs
- Athletics, Student Activities and Off-Site Activities
- Campus Calgary/ Open Minds (CCOM)
- Complementary Curriculum
- Core Curriculum
- Early Learning
- Education Partnerships
- English Language Learners
- Global Learning
- Inclusive Education
- Indigenous Education
- Languages
- Research & Strategy
- Student Voice
- Teaching and Learning with Technology & Learning Resources

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Certificated permanent salaries and benefits	6,673	765,336	6,855	772,852	(182)	(7,515)	(1.0%)
Certificated temporary salaries and benefits	-	26,038	-	25,650	-	388	1.5%
Non-certificated permanent salaries and benefits	2,686	175,374	2,816	176,939	(130)	(1,565)	(0.9%)
Non-certificated temporary salaries and benefits	-	7,292	-	7,240	-	52	0.7%
Dues and fees	-	1,500	-	1,500	-	-	-
Rental equipment and facilities	-	800	-	800	-	-	-
Maintenance and repairs	-	1,798	-	1,798	-	-	-
Insurance	-	325	-	325	-	-	-
Professional services	-	13,012	-	12,271	-	741	6.0%
Utilities	-	413	-	13	-	400	3076.9%
Transportation charges	-	1,175	-	1,175	-	-	-
Travel and subsistence	-	375	-	375	-	-	-
Other supplies	-	49,488	-	60,344	-	(10,857)	(18.0%)
Minor equipment	-	5,139	-	5,629	-	(490)	(8.7%)
Textbooks and materials	-	1,574	-	1,350	-	224	16.6%
Interest and finance	-	50	-	50	-	-	-
<b>Total expenses</b>	<b>9,359</b>	<b>1,049,690</b>	<b>9,670</b>	<b>1,068,312</b>	<b>(311)</b>	<b>(18,622)</b>	<b>(1.7%)</b>

### Variances:

- The reduction of FTE's and related costs reflect a range of staffing decisions resulting in an overall reduction from the spring budget plan. However, all 317 teachers on temporary contract who were initially served notice have been returned to their schools.
- It is important to note that the FTEs are based on estimated resource deployment by school principals, in conjunction with their Education Director. Actual FTEs and amounts spent on salaries and benefits will vary from this and fluctuate throughout the year.

## Service Unit Budgets

There are 'corporate costs' that are managed by respective service units on behalf of the organization. These costs are largely non-discretionary, at least in the short to medium term, as they cannot be easily reduced without significant impact to CBE operations. Specific service units are responsible for monitoring these costs; thus, have these items included in their budget. As these costs are incurred for the entire system, they are grouped and presented together here as 'corporate accounts' for illustrative purposes.

Below is an overview of some activities which are typically incurred in corporate accounts including:

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Certificated permanent salaries and benefits	-	5,376	-	5,303	-	73	1.4%
Certificated temporary salaries and benefits	-	686	-	686	-	-	-
Non-certificated permanent salaries and benefits	17	2,412	17	2,336	-	76	3.2%
Non-certificated temporary salaries and benefits	-	931	-	1,028	-	(97)	(9.5%)
Dues and fees	-	768	-	767	-	-	-
Rental equipment and facilities	-	10,134	-	10,134	-	-	-
Maintenance and repairs	-	18,908	-	30,151	-	(11,243)	(37.3%)
Insurance	-	7,145	-	5,234	-	1,911	36.5%
Professional services	-	14,505	-	14,763	-	(258)	(1.7%)
Utilities	-	27,438	-	27,491	-	(53)	(0.2%)
Transportation charges	-	46,822	-	44,029	-	2,793	6.3%
Other supplies	-	6,240	-	5,866	-	374	6.4%
Minor equipment	-	9	-	9	-	-	-
Amortization	-	64,943	-	67,933	-	(2,990)	(4.4%)
Interest and finance	-	1,538	-	1,538	-	-	-
Other (uncollectible accounts)	-	4,881	-	3,795	-	1,086	28.6%
<b>Total expenses</b>	<b>16</b>	<b>212,736</b>	<b>17</b>	<b>221,064</b>	<b>(0)</b>	<b>(8,328)</b>	<b>(3.8%)</b>

<b>Communications and Engagement Services</b>	Facilitating community engagement services (High School Engagement, etc).
<b>Facilities and Environmental Services</b>	Utilities, amortization, student transportation ( chart buses, Handi-bus, taxis), maintenance, repair costs, etc.
<b>Finance/ Technology Services</b>	Technology licenses, subscription and fees, amortization for board funded assets, insurance, etc.
<b>General Counsel</b>	External legal counsel fees.
<b>Human Resources</b>	Professional Improvement Fellowship (in accordance with the ATA Collective Agreement), secondments, staff development funds, etc.
<b>School Improvement</b>	Programs supporting suicide prevention and therapeutic intervention, the budget for Calgary Police Service school resource officers, and amortization for learning information systems.
<b>Education Matters</b>	In accordance with Public Sector Accounting Standards, EducationMatters is consolidated for the CBE's financial reporting purposes.

*\* The FTEs reported in corporate accounts are responsible for IMR projects whose salaries and benefits are cost-recovered through government funding. In addition to IMR project FTEs in the corporate salaries and benefits accounts, professional leave and secondments, service unit ATRF are also a part of the corporate salaries and benefits.*

Variances:

- Maintenance and repairs has decreased due to the reallocation of IMR funding to schools. IMR revenue expected to be allocated to transportation will be allocated on a recovery basis.
- Elimination of a carried pressure in corporate finance from prior budget.
- Additional detail in transportation expense increase can be found in Attachment V.

## Communications & Community Engagement Services

Communication and Community Engagement Services creates and delivers consistent and timely messages to 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 the CBE priorities. The department also manages and provides support for the public, internal and school websites and other technology tools used by schools and service units. Effective Fall 2019, as part of the School Support Model Transition, corporate partnerships is now managed by Communications and Engagement Services.

	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
<b>Expenses</b>							
Non-certificated permanent salaries and benefits	20	2,348	22	2,471	(2)	(123)	(5.0%)
Dues and fees	-	6	-	6	-	-	-
Maintenance and repairs	-	-	-	-	-	-	-
Professional services	-	15	-	15	-	-	-
Utilities	-	9	-	9	-	-	-
Travel and subsistence	-	3	-	3	-	-	-
Other supplies	-	8	-	8	-	-	-
Minor equipment	-	4	-	4	-	-	-
Textbooks and materials	-	-	-	-	-	-	-
<b>Total expenses</b>	<b>20</b>	<b>2,393</b>	<b>22</b>	<b>2,516</b>	<b>(2)</b>	<b>(123)</b>	<b>(4.9%)</b>

### Variances:

- Decrease of non-certificated permanent staff – eliminating vacant positions to achieve targeted administration service unit reductions.



## School Improvement (including Chinook Learning Services)

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

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Certificated permanent salaries and benefits	115	15,619	119	15,409	(4)	210	1.4%
Certificated temporary salaries and benefits	-	425	-	436	-	(11)	(2.6%)
Non-certificated permanent salaries and benefits	116	13,226	124	13,747	(8)	(521)	(3.8%)
Non-certificated temporary salaries and benefits	-	1,939	-	1,908	-	31	1.6%
Dues and fees	-	148	-	142	-	6	4.2%
Rental equipment and facilities	-	26	-	26	-	-	-
Maintenance and repairs	-	45	-	55	-	(10)	(18.1%)
Insurance	-	7	-	7	-	-	-
Professional services	-	1,489	-	2,328	-	(839)	(36.0%)
Utilities	-	68	-	84	-	(16)	(19.0%)
Transportation charges	-	11	-	-	-	11	-
Travel and subsistence	-	329	-	346	-	(18)	(5.1%)
Other supplies	-	2,102	-	2,444	-	(342)	(14.0%)
Minor equipment	-	205	-	237	-	(32)	(13.5%)
Textbooks and materials	-	122	-	127	-	(5)	(3.9%)
Amortization	-	196	-	240	-	(45)	(18.7%)
Interest and finance	-	10	-	19	-	(9)	(47.4%)
<b>Total expenses</b>	<b>230</b>	<b>35,968</b>	<b>243</b>	<b>37,557</b>	<b>(12)</b>	<b>(1,589)</b>	<b>(4.2%)</b>

Variances:

- Decrease of certificated and non-certificated permanent staff – eliminating vacant positions to achieve targeted administration service unit reductions.
- Decrease in professional services is due to a responsibility change in dual credit programming, which has moved under the Schools and Areas responsibility.

## Facilities & Environmental Services

Facilities & Environmental Services (FES) provides students and employees with quality learning and working environments. FES works closely with students, parents, communities, the City of Calgary, and the Government of Alberta to provide support and services including:

- Design of new and existing facilities.
- Day-to-day operations maintenance, construction, renovation and modernization.
- Internal deliveries, environmental initiatives.
- Emergency, safety and security services.
- Leasing, disposition and management of surplus space and facilities.

	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
<b>Expenses</b>							
Non-certificated permanent salaries and benefits	205	21,011	207	21,428	(2)	(417)	(1.9%)
Non-certificated temporary salaries and benefits	-	683	-	683	-	-	-
Dues and fees	-	122	-	122	-	-	-
Rental equipment and facilities	-	2	-	2	-	-	-
Maintenance and repairs	-	6,181	-	6,231	-	(50)	(0.8%)
Professional services	-	848	-	848	-	-	-
Utilities	-	170	-	170	-	-	-
Transportation charges	-	7	-	7	-	-	-
Travel and subsistence	-	178	-	178	-	-	-
Other supplies	-	771	-	771	-	-	-
Minor equipment	-	31	-	31	-	-	-
Amortization	-	2,876	-	2,874	-	1	0.1%
<b>Total expenses</b>	<b>205</b>	<b>32,882</b>	<b>207</b>	<b>33,347</b>	<b>(2)</b>	<b>(465)</b>	<b>(1.4%)</b>

## Finance and Technology Services

Finance and Technology Services is made up of three integrated teams including Finance, IT operations and IT Client Support. These groups provide financial support and technical services to ensure resources are available to create a personalized learning environment for students including:

- Supporting sound financial practises across the CBE.
- Providing financial administration of fee based services, waivers and collections.
- Monitoring and reporting financial performance through the annual budget and financial reporting periods throughout the year.
- Ensuring the best deals possible for purchased goods and services.
- Paying bills on time.
- Building and supporting CBE's technology infrastructure, integrity and security.
- Operating across 260 discrete sites which involves approximately 300,000 connected devices.
- Supporting students year round with access to services, digital resources and managing the massive volumes of data generated annually.
- Working to ensure computers, tablets, printers, displays, etc. are available and working for all of CBE.
- Supporting the myriad of software solutions that are part and parcel part of the modern learning environment.

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Non-certificated permanent salaries and benefits	187	22,932	195	23,261	(8)	(329)	(1.4%)
Non-certificated temporary salaries and benefits	-	442	-	482	-	(40)	(8.3%)
Dues and fees	-	237	-	262	-	(25)	(9.5%)
Maintenance and repairs	-	7	-	7	-	-	0.0%
Professional services	-	316	-	356	-	(40)	(11.3%)
Utilities	-	53	-	53	-	-	0.0%
Travel and subsistence	-	70	-	70	-	-	-
Other supplies	-	171	-	171	-	-	-
Minor equipment	-	171	-	221	-	(50)	(22.6%)
Textbooks and materials	-	1	-	1	-	-	-
Amortization	-	5,139	-	3,278	-	1,860	56.7%
<b>Total expenses</b>	<b>187</b>	<b>29,538</b>	<b>195</b>	<b>28,162</b>	<b>(8)</b>	<b>1,376</b>	<b>4.9%</b>

### Variances

- Decrease of non-certificated permanent staff – eliminating vacant positions to achieve targeted administration service unit reductions.
- The increase in amortization costs are for assets that have come into service for assets that support the entire jurisdiction.

## Human Resources

Human Resources supports employees with all matters related to their employment relationship with the CBE. They support over 14,000 employees and proactively recruit talent while balancing current and future projected needs. The team oversees 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.

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Certificated permanent salaries and benefits	7	833	9	1,147	(2)	(314)	(27.4%)
Certificated temporary salaries and benefits	-	100	-	100	-	-	-
Non-certificated permanent salaries and benefits	96	10,702	101	10,603	(4)	99	0.9%
Non-certificated temporary salaries and benefits	-	174	-	174	-	-	-
Dues and fees	-	47	-	47	-	-	-
Rental equipment and facilities	-	2	-	2	-	-	-
Maintenance and repairs	-	3	-	3	-	-	-
Professional services	-	1,149	-	1,149	-	-	-
Utilities	-	31	-	31	-	-	-
Travel and subsistence	-	123	-	123	-	-	-
Other supplies	-	235	-	235	-	-	-
Minor equipment	-	30	-	30	-	-	-
Textbooks and materials	-	44	-	44	-	-	-
Amortization	-	45	-	45	-	-	-
<b>Total expenses</b>	<b>103</b>	<b>13,516</b>	<b>110</b>	<b>13,731</b>	<b>(6)</b>	<b>(215)</b>	<b>(1.6%)</b>

### Variances

- Net decrease of non-certificated permanent staff – eliminating vacant positions to achieve targeted administration service unit reductions.
- Transferred positions into School Improvement as a part of the New School Support Model.

## Chief Superintendent's Office

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.

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Total salaries and benefits	3	559	5	934	(2)	(375)	(40.1%)
Dues and fees	-	13	-	13	-	-	-
Rental equipment and facilities	-	164	-	164	-	-	-
Maintenance and repairs	-	2	-	2	-	-	-
Professional services	-	29	-	29	-	-	-
Utilities	-	4	-	4	-	-	-
Travel and subsistence	-	9	-	8	-	-	-
Other supplies	-	19	-	19	-	-	-
Minor equipment	-	2	-	2	-	-	-
Textbooks and materials	-	-	-	-	-	-	-
<b>Total expenses</b>	<b>3</b>	<b>801</b>	<b>5</b>	<b>1,176</b>	<b>(2)</b>	<b>(375)</b>	<b>(31.9%)</b>

## Legal Services

Legal Services provides the business functions of law, privacy and access. The service unit handles the CBE's Administrative Regulation development, contract administration, Corporate Secretary and administrative support to the Board of Trustees.

Legal Services supports students, schools and the CBE 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.

Expenses	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
Total salaries and benefits	11	1,481	11	1,481	-	-	-
Dues and fees	-	19	-	19	-	-	-
Maintenance and repairs	-	2	-	2	-	-	-
Professional services	-	3	-	2	-	-	-
Utilities	-	4	-	4	-	-	-
Travel and subsistence	-	12	-	12	-	-	-
Other supplies	-	26	-	26	-	-	-
Minor equipment	-	14	-	13	-	-	-
Textbooks and materials	-	12	-	12	-	-	-
Amortization	-	21	-	36	-	(14)	(40.4%)
<b>Total expenses</b>	<b>11</b>	<b>1,634</b>	<b>11</b>	<b>1,649</b>	<b>-</b>	<b>(14)</b>	<b>(0.9%)</b>

## Board of Trustees

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. 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 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 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 relevant service unit. Staff who directly support and manage the proceedings of the Board of Trustees are included in Legal Services.

	Fall Budget 2019-20		Budget 2019-20		Increase/ (Decrease)		
	FTE	(\$000s)	FTE	(\$000s)	FTE	(\$000s)	%
<b>Expenses</b>							
Non-certificated permanent salaries and benefits	-	424	-	424	-	-	-
Dues and fees	-	249	-	349	-	(100)	(28.7%)
Professional services	-	678	-	678	-	-	-
Utilities	-	1	-	1	-	-	-
Travel and subsistence	-	34	-	34	-	-	-
Other supplies	-	6	-	6	-	-	-
Textbooks and materials	-	1	-	1	-	-	-
<b>Total expenses</b>	-	1,393	-	1,493	-	(100)	(6.7%)

	Reserve balance Sept 1, 2019	Approved planned transfer from reserves	Fall Update planned transfer from reserves	Anticipated reserve balance Aug. 31, 2020
	(in \$000s)			
<b>Operating reserves</b>				
Unrestricted reserves	24,352	(9,607)	(11,953)	12,399
Restricted reserves	(8,204)	-	-	(8,204)
Designated operating funds	6,846	-	(6,846)	-
<b>Total operating reserves</b>	<b>22,994</b>	<b>(9,607)</b>	<b>(18,799)</b>	<b>4,195</b>
<b>Capital reserves</b>				
Building reserve	9,019	-	-	9,019
Other capital reserves	6,070	-	(5,478)	592
Plant, operations and maintenance asset replacement	798	-	-	798
<b>Total capital reserves</b>	<b>15,887</b>	<b>-</b>	<b>(5,478)</b>	<b>10,409</b>
<b>Total reserves</b>	<b>38,881</b>	<b>(9,607)</b>	<b>(24,277)</b>	<b>14,604</b>

At \$4.195 million the CBE's total operating reserves represent approximately 3/10ths of one percent of total CBE expenditures. This modest level of reserves is the result of significant investment in the commissioning of new and modernized schools and the maintenance of important school programs including all-day kindergarten. This spending reflects the CBE's commitment to ensure dollars received in a year are invested in the students being served in that year. This approach is consistent with the CBE's values of students come first and learning is our central purpose.

Capital reserves of \$10.409 million are modest given the CBE's infrastructure replacement value of more than \$5.0 billion. Over the last few years the CBE's capital reserves have also been deployed to commission (bring into operation) a number of new, modernized and replacement schools. Capital reserves were also deployed to support deployment of modular classrooms. The CBE anticipates the sale of some non-core assets in 2019-20 that will assist in replenishing the CBE's capital reserves.



	Budget 2019-20	Approved carryforward and revisions	Fall update 2019-20
	(in \$ thousands)		
<b>Capital lease payments (contracts)</b>			
Performance contracts	2,270	-	2,270
<b>Total Capital Lease Payments (Contracts)</b>	<b>2,270</b>	<b>-</b>	<b>2,270</b>
<b>Non-facility related projects</b>			
Strategic	-	652	652
Enhancement	-	1,148	1,148
Maintenance	-	2,769	2,769
<b>Total non-facility related projects</b>	<b>-</b>	<b>4,568</b>	<b>4,568</b>
<b>Capital reserve projects</b>			
New school commissioning	-	910	910
<b>Total capital reserve projects</b>	<b>-</b>	<b>910</b>	<b>910</b>
<b>Unallocated board funded projects</b>	<b>22,042</b>	<b>(11,629)</b>	<b>10,413</b>
<b>Total non-facility capital expenditures</b>	<b>24,312</b>	<b>(6,151)</b>	<b>18,161</b>
<b>Financed by the following:</b>			
Contribution to operating activities	(5,000)	(10,478)	(15,478)
Total amortization expense (non-cash)	29,312	(1,151)	28,161
Transfer from capital reserves	-	5,478	5,478
<b>Total board-funded financing</b>	<b>24,312</b>	<b>(6,151)</b>	<b>18,161</b>

### Transportation

The CBE arranges transportation for students by contracting with yellow school bus providers or working with Calgary Transit to ensure transportation is available to move students safely, reliably, affordably and in alignment with bell times.

Fee assumptions are based on information provided in the Education Act. Included in the Transportation budget will be the incorporation of 6,000 new riders that previously would not have paid based on their distance from their designated school. These students will now be paying for the ridership, and this levy will be retroactive to September 1, 2019 when the Education Act was proclaimed. The levy will be \$365 to align with current fee paying riders.

Fees increased under budget 2019-20 from \$350 to \$365. Fees are now levied for all riders except students in specialized programs or documented mobility needs who required specialized transportation who are exempt from fees as noted in the Education Act. The rebate currently provided to students that access Calgary Transit to travel to school has been eliminated retroactive to the beginning of the 2019-20 school year as the grant funding used to support this rebate has been cut.

To minimize the impact to families, the CBE is repurposing \$5 million in IMR funding to offset the \$8 million reduction in funding resulting from the elimination of the Fee Replacement Grant. All other service levels have been maintained for the remainder of the 2019-20 school year.

	Fall Budget 2019-20	Budget 2019-20	Increase/ (Decrease)
(in \$000s)			
<b>Government grants and other</b>	<b>35,669</b>	<b>43,633</b>	<b>(7,965)</b>
Busing aides	-	1,504	(1,504)
Central administration	1,291	1,328	(37)
Transportation services	46,829	44,037	2,793
Other supplies and services	861	861	-
Waivers	1,037	685	352
Uncollectible accounts	519	196	323
<b>Total transportation costs</b>	<b>50,537</b>	<b>48,610</b>	<b>1,927</b>
<b>Funding gap</b>	<b>(14,868)</b>	<b>(4,977)</b>	<b>(9,892)</b>
Repurposed infrastructure maintenance and renewal funding	5,000	-	5,000
Fees	7,410	4,892	2,518
<b>Net (deficit) / surplus</b>	<b>(2,459)</b>	<b>(85)</b>	<b>(2,374)</b>

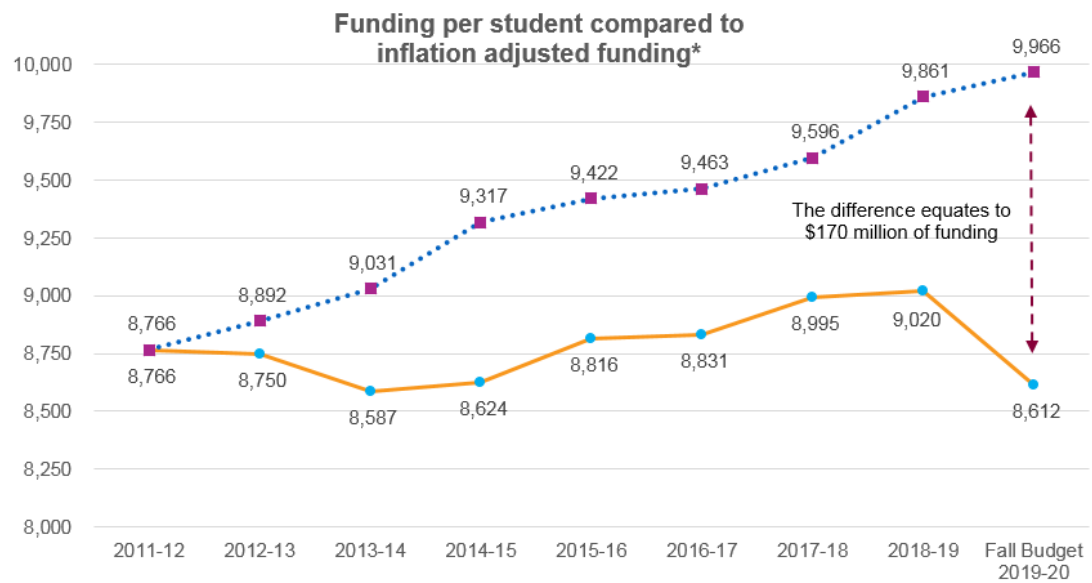
Transportation services have increased due to the complexity of riders and updated routes. Waivers and uncollectible amounts have been revised to reflect the latest fee increase for the 6,000 riders.

### Noon Supervision

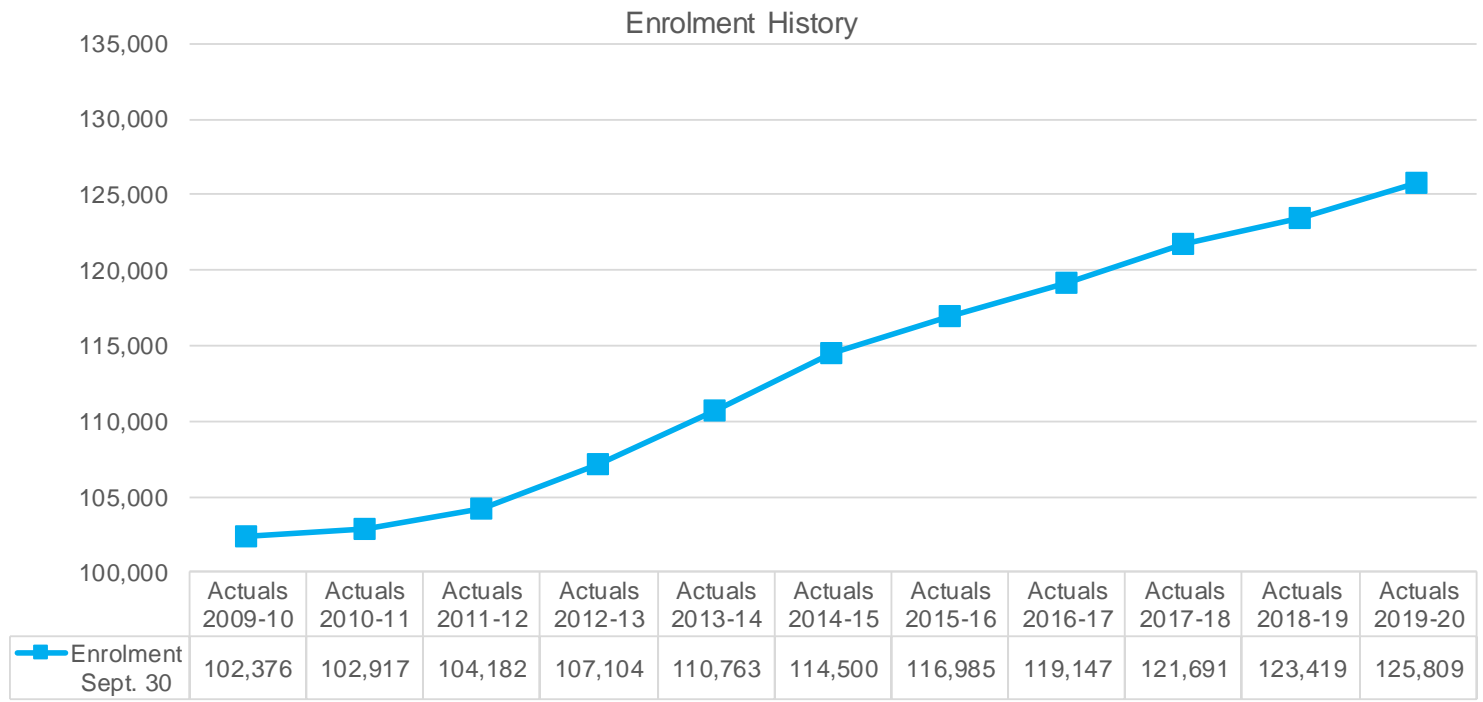
Fees are based on regulations provided in the Education Act and did not have any significant changes from the spring budget. Approximately 55,000 students are enrolled in noon supervision. Noon supervision is a cost recovery program. If there is a surplus at the end of the year, the surplus, if any, is put back into the program to moderate year to year fee changes.

Noon Supervision Fee level	2019-20	2018-19	2017-18
4 day	\$275	\$265	\$255
4/5 day	\$295	\$285	\$275
5 day	\$305	\$295	\$285

	Fall Budget 2019-20	Budget 2019-20	Increase/ (Decrease)
(in \$ thousands)			
<b>Available funding</b>	-	-	-
School-based staff	10,896	10,231	665
Central administration	469	547	(78)
Contracts and services	523	523	-
Waivers	2,121	1,828	293
Uncollectible accounts	1,060	942	118
<b>Total noon supervision costs</b>	<b>15,069</b>	<b>14,072</b>	<b>998</b>
<b>Funding gap</b>	<b>(15,069)</b>	<b>(14,072)</b>	<b>(998)</b>
Fees	15,147	14,062	1,085
<b>Net (deficit) / surplus</b>	<b>78</b>	<b>57</b>	<b>21</b>



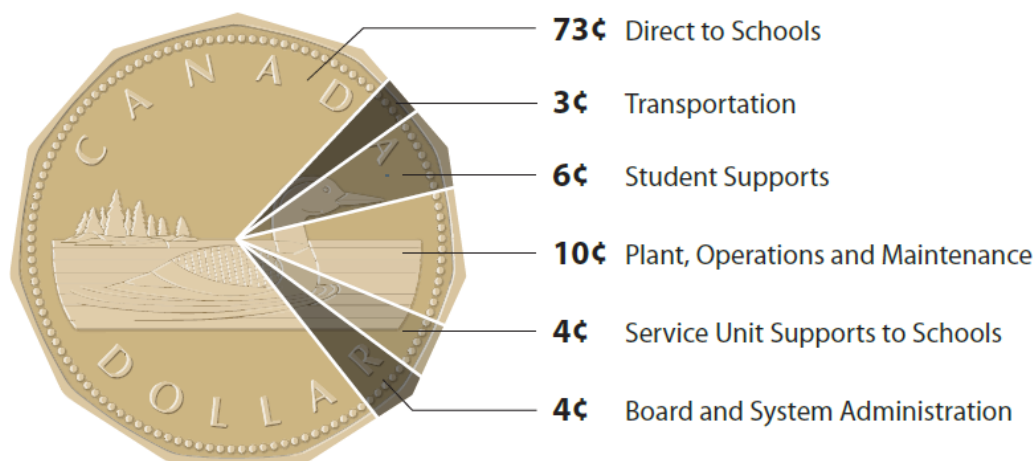
\*The chart above excludes targeted funding including Infrastructure Maintenance & Renewal (IMR), Alberta Teacher's Retirement Fund, transportation grants and expended deferred capital revenues (EDCR) have been excluded from the total funding received as these are targeted grants which do not fund regular operations. For 2019-20 the CBE received Ministerial approval to use up to \$15 million from IMR funding to support the funding gap projected. Notwithstanding the one time transition purpose of IMR, it is treated as targeted for the purpose of this chart.





**Calgary Board  
of Education**

## Dividing the Dollar: How Every Cent of Alberta Education Funding Supports CBE Schools



### 73¢ | Direct to Schools

Money is provided to schools via a process the CBE calls RAM (Resource Allocation Method).

- The RAM is used to allocate resources equitably
- Principals make decisions on how to use money from the RAM to meet learning outcomes and the unique needs of students within their schools
- Includes teacher and staff salaries and benefits as well as the contractual obligation of teachers' pensions
- Instructional supplies and materials
- Custodial services for healthy learning environments

### 6¢ | Student Supports

Such as:

- Psychologists
- Occupational and physical therapists
- Cultural diversity advisors
- Speech language pathologists
- Braille assistants

### 4¢ | Service Unit Supports to Schools

Centrally provided services that increase efficiencies, effectiveness and economical savings:

- Instructional and programming support provided to teachers and schools
- Indigenous education
- School health
- Off-campus learning programs
- High school success initiatives
- School nutrition

### 3¢ | Transportation

Transportation for 34,500 students, including those with exceptional and special needs. Includes supports such as:

- Busing aides
- Charter service
- Attendants
- Licensed Practical Nurses
- Calgary Transit passes
- Taxi/ Handi-Bus service

### 10¢ | Plant, Operations and Maintenance

- Facility maintenance
- Repairs
- Utilities
- Insurance
- Amortization for provincially funded new schools, modulars, and modernization

### 4¢ | Board and System Administration

- Technology services and support, including safeguarding student data and CBE networks
- Communications and community engagement, including website administration and school/ school council communication assistance
- Financial supply chain management
- Legal services
- Payroll and benefits administration
- Board of Trustees and superintendents who provide the overall direction to the system



# Budget Assumptions Report 2019-20 Fall 2019 Update II



learning | as unique | as every student

1221 - 8 Street S.W.  
Calgary, AB T2R 0L4

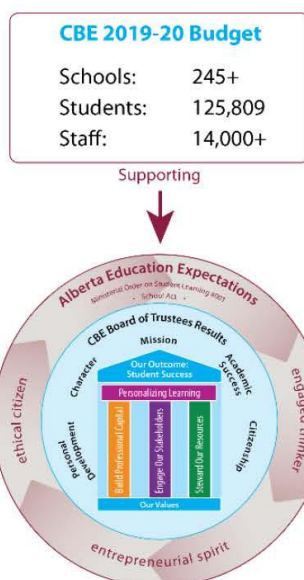


**Calgary Board  
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## Organizational Summary

### Mission

The Board of Trustees' Mission is: **"Each student, in keeping with their individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work and continued learning."** The CBE considers each individual student and their learning requirements while balancing all student needs against available financial and other resources.

### Values

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

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

The CBE will continue to optimize student learning while recognizing the reality of fiscal constraints.

### Guiding documents

The CBE is guided by its [Three-Year Education Plan](#). This plan is updated each year as required by Alberta Education to support accountability and transparency throughout the Provincial ECS (pre-kindergarten and kindergarten) to Grade 12 education system and to ensure alignment of school authorities with Provincial direction.

The CBE's 2018-21 Three-Year Education Plan guides the work and connects each CBE employee to the Mission, Values and Outcome: Student Success. The CBE is focused on personalized learning, building professional capital, engaging stakeholders and stewarding resources. Taken together, the CBE believes these areas of focus allow for the provision of a high quality public education for all CBE students.

For the 2019-20 school year the CBE will focus on achieving the goals set out in the Three-Year Education Plan and the following system priorities:

- Improving student achievement, equity and well-being
- Strategically allocating resources to support student success
- Increasing organizational effectiveness through service transformation
- Developing our employees

## Provincial Budget and Impacts

Typically, Provincial budgets are received in the spring prior to the start of a new school year. This timing permits jurisdictions to plan and make staffing decisions. For 2019-20, the final budget was received in the fall (Oct. 24, 2019) subsequent to the start of the school year. Decisive action was needed with the information available at the time. Combined with limited reserves the actions required had a higher likelihood of impacting schools, students and staff. What follows is the evolution of planning for the 2019-20 budget cycle.

## Balancing the Budget Mid-Year



2019-20 school year started without a provincial budget; services were provided based on Board-approved assumptions that assumed the same funding as 2018-19. Fall budget announcement made it clear that there was an additional gap.



Now that there is clear information on funding to be received, CBE must make up for:

- Difference in funds already spent PLUS
- \$32M decrease in funding

On June 30, 2019, the CBE submitted a balanced budget, as required, to Alberta Education ([Spring Budget 19/20](#)). That spring budget was based on the assumption that school jurisdiction funding for 2019-20 would be maintained at 2018-19 funding levels notwithstanding enrolment growth and other inflationary cost pressures. Strategies deployed in the spring budget included maintaining the allocation to schools consistent with the prior year, reducing service unit costs and staffing, reducing board funded capital spending, and drawing on reserves to bridge the funding gap.

## Spring Budget 2019-20

Based on assumptions set in the spring budget:

	In millions
Projected Status Quo Budget	(\$40)
Strategies to reduce budget deficit	
• Maintain 2019-20 school based funding at 2018-19 levels notwithstanding enrolment growth of 2400	\$22
• Decrease in service unit budgets	\$3
Assumed Spring Budget 2019-20 deficit	(\$15)
Use of operating and capital reserves to balance	\$10
Carried pressure for 2019-20 (Savings to be found throughout the year)	(\$5M)

On Oct. 24, 2019, the provincial budget was released. That budget reduced total Alberta Education revenue allocated to the CBE by \$32 million on a year over year basis notwithstanding enrolment growth of 2,400 students.

The spring budget assumed continued funding of the Fee Replacement Grant, Class Size Initiative and Classroom Improvement Fund. These three grants, totalling \$85 million, were eliminated and replaced with a one-time, \$24 million, transition grant plus enrolment growth funding of \$29 million. The net changes amount to a decrease of \$32 million. As the funding change is being implemented mid-year, \$48 million in annualized savings are required to generate \$32 million over the remainder of the school year.

## Fall Budget Update 2019-20

After the provincial budget announcement, the decrease in funding to be received from Alberta Education includes:

(\$85M)	Eliminated Grants Class size initiative \$54M Fee Replacement Grant \$18M Classroom Improvement Fund \$13M
\$24M	One Time Transition Grant
\$29M	Enrolment and other funding changes
(\$32M)	Total decrease in funding received

In the [Budget Assumptions Report - Fall Preliminary](#) administration identified strategies to close the gap created by the funding cut. The solutions were not ideal and would affect students, families, schools and CBE staff; but they needed to be considered in order to close the gap for the remainder of the 2019-20 budget year.

Decisive action was required in order to achieve the reductions within the remainder of the year. A one-month delay in taking action would have necessitated finding an additional \$5 million in savings on an annualized basis.

The first action on this strategy occurred on Nov. 19, 2019, when the CBE issued termination notices to 317 teachers on temporary contracts effective Jan. 2, 2019.

Termination notices were issued in order to provide CBE flexibility in decision making as it continued its evaluation of options to bridge the funding gap. To achieve this flexibility, statutory requirements mandate providing 30 days notice before a break of 14 days or more (in this case, winter break). The relevant sections exist under the *Education Act* (sections 209(3) and 217(1)).

With this flexibility the CBE intended to return approximately half of the staff who received notice to schools. At the same time the CBE was planning to reallocate central certificated staff to schools and reduce funding and staffing in service units.

On Nov. 27, 2019, the CBE received communication from the Minister of Education advising that for the 2019-20 school year only, subject to ministerial approval, school boards have the ability to repurpose the operating portion of the Infrastructure Maintenance and Renewal (IMR) grant to support classroom, or school-based, certificated and non-certificated staffing costs.

The CBE requested and received ministerial approval on Dec. 2, 2019 to access this additional flexibility in the amount of \$15 million. As a result, the CBE has re-assessed the immediate need to reduce the number of temporary teachers mid-year.

The remainder of this report sets out the revised strategies and targeted savings associated with each action, modified by the evolving budget announcements and consultation with Alberta Education.

## Strategies

**NOTE: This Budget Assumptions Report – Fall Update II incorporates the impact of repurposing \$15 million of Infrastructure Maintenance and Renewal grant funding to support certificated and non-certificated positions in schools. That reallocation allows the CBE to rescind the termination notices sent to 317 teachers on temporary contracts. Those staff will return to schools for the remainder of the school year. The remaining funds will be used to moderate the impact of fee increases and eliminate the need for service level changes related to student transportation for the 2019-20 school year.**

The following strategies, to close the annualized spending gap of \$48 million, have been updated based on the Dec. 2, 2019 approval by the Minister of Education to access \$15 million in Infrastructure Maintenance and Renewal grant funding. These strategies also incorporate the impacts and implications of provision within the relevant collective agreements which apply to 98 percent of all CBE staff.



Strategy	Context	Fall Budget	Spring Budget	Total 19/20
1. Deploy central and Area office staff to schools	<p>Prior to the approval of IMR grant funding use to address reductions, the CBE had begun a process of identifying staff for mid-year transfer to address the reduction of temporary teachers in key roles in schools.</p> <p>This transfer process is subject to a number of notice and transfer provisions within the Alberta Teachers Association collective agreement and within the <i>Education Act</i>. Those provisions mean that while the process has begun, it will not fully conclude until the beginning of the 2020-21 school year. As IMR grant funding will be utilized to address temporary teacher continuation subject to the normal fall staffing adjustments, redeploying staff to replace positions will not occur.</p> <p>The CBE is now working through a process to conclude specific programs and services provided by staff in a manner that will maximize current resources and align with future direction given required reductions.</p> <p>This means that between 35 and 45 FTE reductions will need to occur within the School Improvement Service Unit. These reductions will result in redeployment to school positions in the 2020-21 school year.</p> <p><b>Timeline:</b> This strategy is currently underway and will be completed to allow for redeployment of staff for the 2020-21 school year.</p> <p><b>IMR:</b> No repurposed IMR grant funding will be used as part of this strategy.</p>	<p>No direct savings as central staff are re-deployed to schools.</p> <p>This strategy represents a transfer of approximately \$3.5 to \$4.5 million from service units to schools when complete for the 2020-21 school year.</p>	-	-

Strategy	Context	Fall Budget ~ \$4M	Spring Budget ~ \$3M	Total 19/20 ~ \$7M
2. Administrative reductions (Service Units)	<p>In the CBE's spring budget a \$3 million cut was applied to service units as part of the then balancing strategy.</p> <p>For this update, service units will absorb another \$4 million in reductions. This reduction will impact approximately 33 positions across all service units (see Appendix IV).</p> <p>Note: The \$4 million reduction does not include the transfer of central certificated staff noted in strategy 1 that will be implemented for the 2020-21 school year.</p> <p><b>Timeline:</b> This strategy has commenced with vacant positions. Impacted staff will be advised in the new year.</p> <p><b>IMR:</b> No repurposed IMR grant funding will be used as part of this strategy.</p>			
3. Reduce capital spending	<p>The CBE's spring budget incorporated a \$5 million reduction to board funded capital spending. Board funded capital dollars are drawn from Alberta Education grant funding as there is no specific grant from Alberta Education for capital acquisitions.</p> <p>This update incorporates an additional reduction to board funded capital spending of \$5 million bringing the total reduction to board funded capital spending to \$10 million.</p> <p>The remaining board funded capital allocation will be used to support necessary capital acquisitions based on health, safety, legal compliance or future cost savings criteria.</p> <p><b>Timeline:</b> This strategy has commenced and is in place.</p> <p><b>IMR:</b> No repurposed IMR grant funding will be used as part of this strategy.</p>	~ \$5M	~ \$5M	~ \$10M



Strategy	Context	Fall Budget	Spring Budget	Total 19/20
4. Student transportation	<p>The spring budget included an increase in transportation fee from \$350 to \$365 for those who could legally be charged a fee. No changes to service levels were incorporated.</p> <p>This update incorporates the levying of a fee to approximately 6,000 students who currently ride yellow buses for free. With the implementation of the <i>Education Act</i> and related regulations, students in specialized programs or documented mobility needs who require specialized transportation are exempt from transportation fees.</p> <p>The fee for students who currently ride for free will be \$365, the same rate as currently paid by 14,500 fee paying students. This levy will be retroactive to September 1, 2019 when the <i>Education Act</i> was proclaimed. Levying this fee will generate an estimated \$1.8 million in incremental transportation revenue net of waivers and write-offs.</p> <p>The CBE will also eliminate the rebate currently provided to students who access Calgary Transit to travel to school as the rebate was conferred onto specific students by regulations of the previous government. It has been removed from the <i>Education Act's</i> student transportation regulation. The rebate will be eliminated retroactive to the beginning of the 2019-20 school year. The elimination of this program will save approximately \$2.4 million dollars.</p> <p><b>Timeline:</b> This strategy will commence as of Jan. 1, 2020 retroactive to Sept.1, 2019.</p> <p><b>IMR:</b> To help minimize the impact on families, CBE plans to use about \$5 million in IMR funding to offset the \$8 million reduction in funding resulting from the elimination of the Fee Replacement Grant. This use of IMR grant funding is appropriate as any deficit in the transportation program is funded from the basic grant funding. Preserving basic grant funding allows more dollars to flow to schools and maintain front-line positions.</p>	~ \$5.5 M	-	~ \$5.5 M

Strategy	Context	Fall Budget	Spring Budget	Total 19/20
5. Use of reserves	<p>The CBE's spring budget allocated \$5 million from the \$14 million in available for use operating reserves as at Aug. 31, 2019.</p> <p>The spring budget also included a "carried pressure" of \$5 million that was to be recovered over the course of the school year.</p> <p>With a \$32 million revenue reduction, it is unlikely that the required \$5 million can be recovered over the course of the school year. Accordingly, the revised CBE budget for 2019-20 will seek board approval for access to an additional \$5 million in available for use operating reserves.</p> <p>The available for use operating reserve balance after the \$10 million withdrawal noted above is projected to be \$4 million (see Appendix I).</p> <p><b>Timeline:</b> This strategy will be actively monitored over the remainder of the school year. Any savings that can be recovered outside of the strategies included in this report will be used to offset the draw upon reserves.</p> <p><b>IMR:</b> No repurposed IMR grant funding will be used as part of this strategy.</p>	~ \$5M	~ \$5M	~ \$10M



Strategy	Context	Fall Budget ~ \$22M	Spring Budget ~ \$22M	Total 19/20 ~ \$44M
6. Funds directly allocated to schools	<p>The CBE's spring budget allocated the same amount of funding to schools for 2019-20 as was allocated for 2018-19. By maintaining school based funding the CBE saved the \$22 million that would have had to have been spent to maintain programs and services at 2018-19 levels based on enrolment growth of 2,400 students.</p> <p>The revised budget plan will see approximately \$12 million removed from the Resource Allocation Method for 2019-20. The \$12 million represents the value of school-based positions funded but not filled across the CBE. This action has no impact on current school based staffing levels.</p> <p>The CBE will then utilize up to \$10 million in repurposed IMR grant funding to <u>return all 317 teachers</u> on temporary contract who were notified of termination in November, subject to normal fall operational adjustments.</p> <p>The CBE is also working to ensure that appropriate levels of support staffing is retained in schools consistent with student needs.</p> <p>Taken together, these components will minimize, to the extent possible, the impact on students and classrooms over the remainder of the school year (see Appendix III).</p> <p><b>Timeline:</b> This strategy is currently underway. Certificated staff will be advised prior to the winter break. Support staff notification will occur in the new year consistent with collective agreement provisions.</p> <p><b>IMR:</b> \$10 million in repurposed IMR grant funding will be used as part of this strategy.</p>		<p>The spring budget held the allocation to all CBE schools to 2018-19 funding levels. This saved approximately \$22 million and increased class sizes by approximately one student per class, on average.</p>	
	<b>Total potential savings</b>	<b>\$30 - \$45M</b>	<b>\$35 - \$40M</b>	<b>\$65 - \$85M</b>

## Assumptions & Risks

See Appendix VI for additional assumptions (including revenue, expense, reserve and capital assumptions) planned to be incorporated into the final budget report. See Appendix VII for risks considered.

## Conclusion

Notwithstanding the complexities of receiving a Provincial budget during the school year, these strategies and assumptions will guide the CBE to build a balanced budget that reflects its values. In order to minimize the impact on student learning, the CBE has approached bridging the funding gap in a way that balances the reductions across the organization and redeploys resources accordingly. These budget assumptions support learning for students next year and within CBE funding constraints.

The CBE will continue to be constrained by climbing enrolment, lack of operating reserves, age of facilities, and cuts to services provided by central service units in the 2019-20 budget year.

Maximizing the dollars directed to the classroom to support student results remains the top priority. The CBE, working with students, families, stakeholders, and Alberta Education, will continue to provide the best public education programs and supports possible within the financial resources made available.

CBE's choices will continue to be guided and informed by its values: students come first, learning is our central purpose, and public education serves the common good.

## Appendix I: Operating & Capital Reserves

	<b>Operating</b>	<b>Capital</b>
	(in millions)	
Available reserves at Aug 31, 2019	\$23.0	\$15.9
EducationMatters (Note 1)	(\$2.0)	
Carryforwards	(\$6.8)	(\$5.5)
Unrestricted reserve available for use at Sept 1, 2019	\$14.2	\$10.4
<b>Planned future use of reserves</b>		
Balance funding gap – spring budget	(\$5.0)	(\$5.0)
Balancing funding gap – fall budget	(\$5.0)	
Commissioning costs for new schools (Note 2)		(\$16.0)
<b>Future reserve balances</b>	<b>\$4.2</b>	<b>(\$10.6)</b>

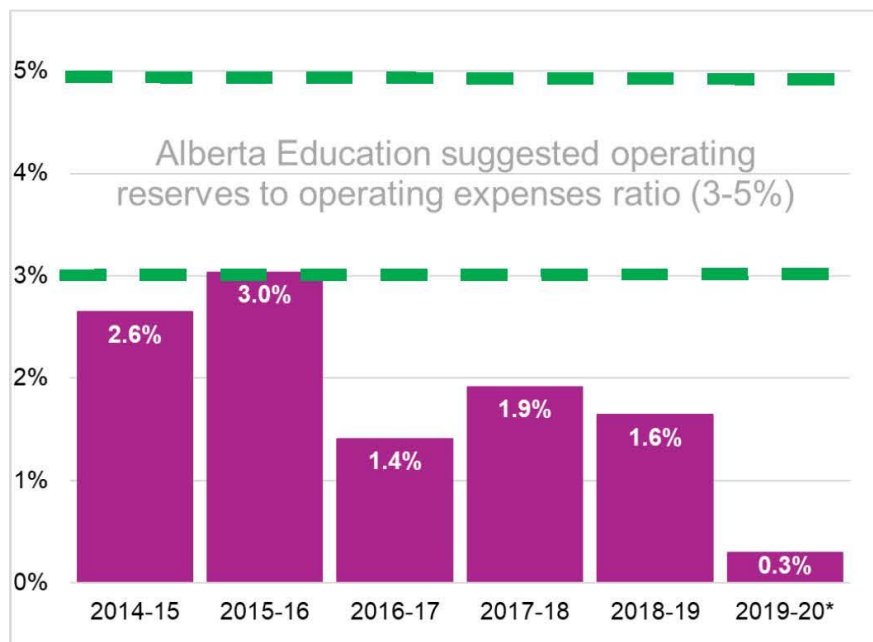
Note 1 - Reserves related to EducationMatters are held in trust and cannot be used to support CBE operations.

Note 2 - Costs are based on an estimated \$2 million per school opening based on historical information for schools opening in 2021 and beyond.

- Having sufficient funds in the reserves helps the CBE navigate through any unforeseen events, projects or initiatives that come up during the year, that are not included in the budget. With the planned reserve balances, opportunities could be foregone and risks may not be mitigated.
- The use of reserves to balance the budget has been a short-term strategy deployed in previous budget years to minimize the impact on students and the overall learning experience.

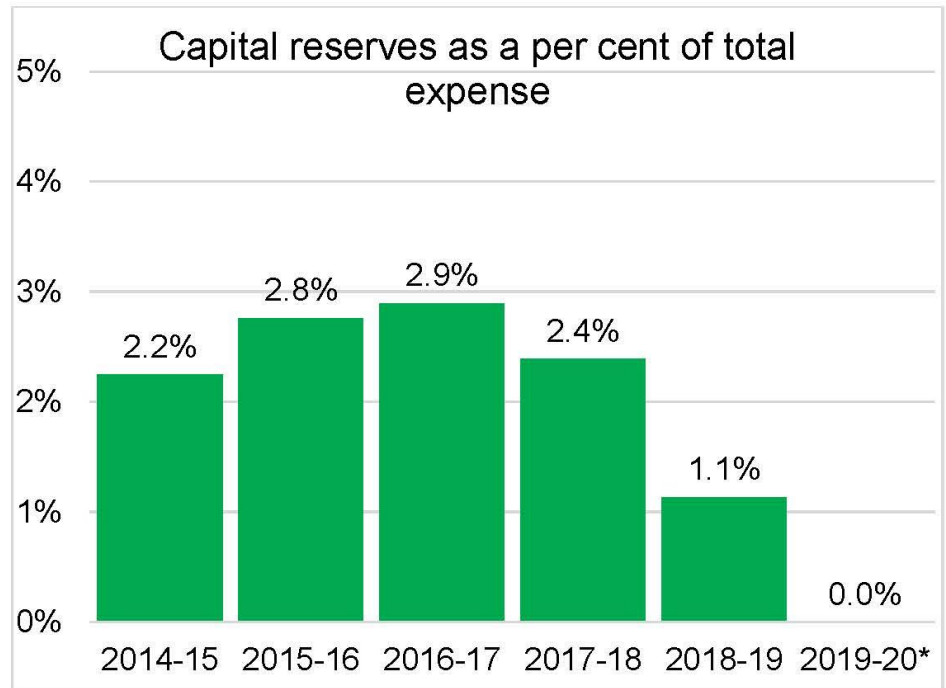
## Appendix II: Historical and Projected Reserve Ratios

### Operating Reserves



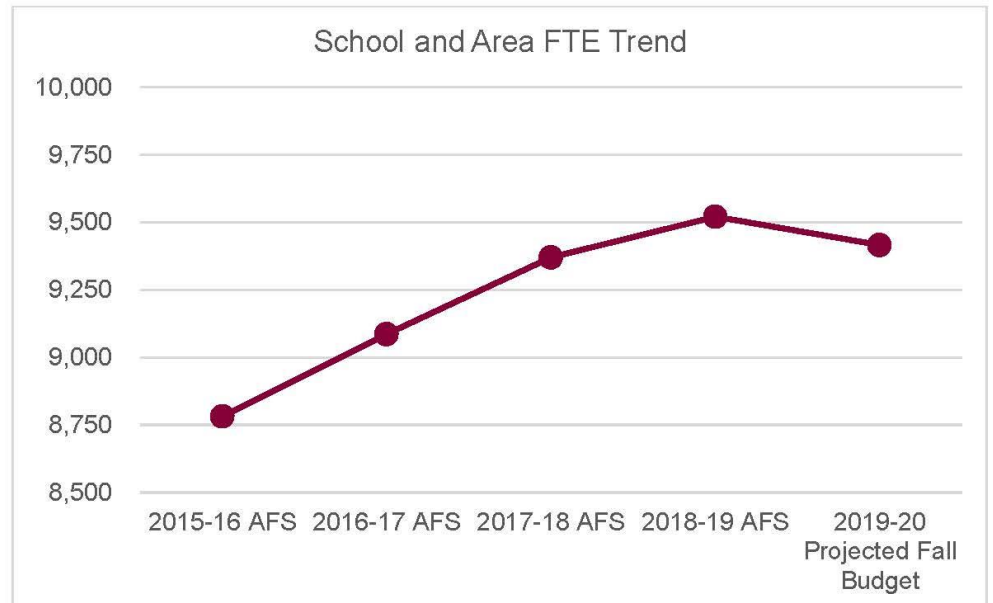
- \*The 19/20 projected reserve balance is based on the decisions identified in Appendix I.
- The chart outlines the historical operating reserve balance to operating expense ratio compared to the Alberta Education suggested ratio.
- The CBE spends approximately \$7.7 million per instructional day.

## Capital Reserves



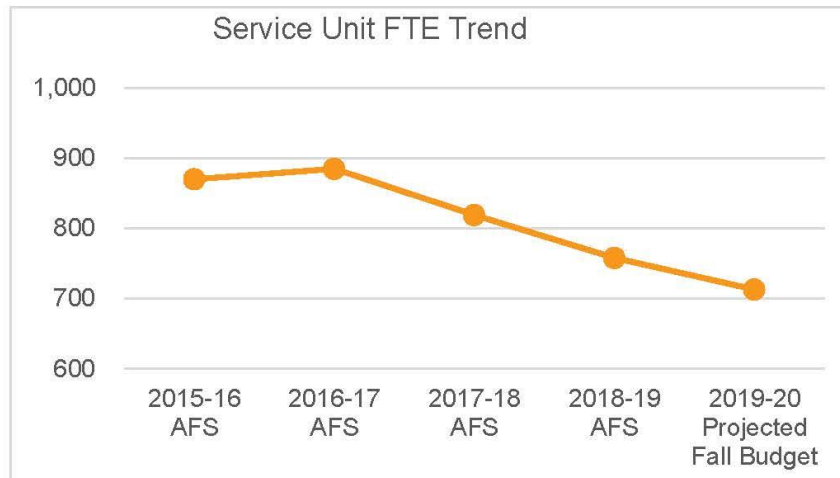
- Decrease in capital reserves consistent with new school construction over the past three to four years, which required funds for commissioning.

### Appendix III School and Areas FTE Trend



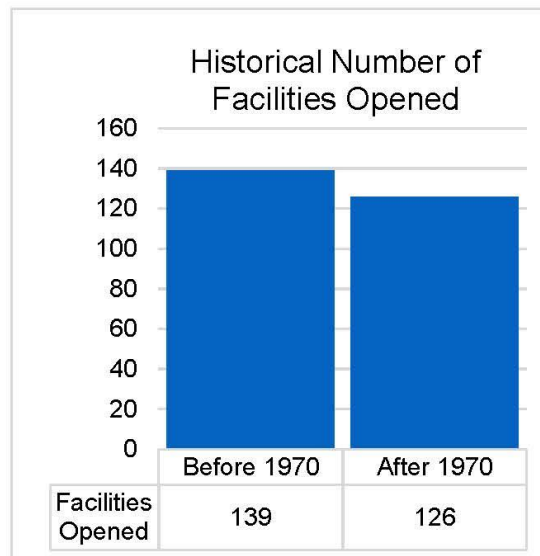
- Over five years, school and Area FTEs have increased by 634 (or 7 per cent).
- With increased enrolment and the decrease in funding received in 2019-20, the school and Area budgeted FTE has declined placing increased pressure on schools.

## Appendix IV Service Unit FTE Trend



- Over five years, service unit FTEs have decreased by 157 (or 18 per cent).
- Although steadily increasing enrolment, the service unit FTE has steadily decreased since 2016-17, as CBE continues to ensure that priority is placed on frontline staff in schools.
- Service unit FTE's provide for finance, information technology, client technology, human resources, payroll, community engagement, legal, central facility maintenance and support, psychologists, speech pathologists, occupational and physical therapists, as well as a range of pedagogical supports for school based staff. Many of these staff are regularly deployed to schools.
- 93 percent of CBE staff are in schools and Areas or regularly deployed to schools.

## Appendix V: Age of Facilities



- The CBE has more than 130 schools that are over 50 years old. Funding is required in order to ensure safe and modernized facilities are available for students.
- The province estimates the CBE's deferred maintenance is \$162 million for immediate needs (e.g., aging roofs and boilers).



## Appendix VI: Assumptions

### General Assumptions

The CBE's budget assumes:

- Dollars received are spent on students who are enrolled in CBE schools for the school year. This means the CBE does not seek to increase its reserves without purpose.
- Families and students will continue to make program choices that are similar to those made in the prior year.
- The CBE's budget will comply with Alberta Education budget and reporting guidelines.
- The CBE will continue to provide safe, healthy, and supportive learning and working environments for all students and staff.
- Sufficient budget resources will be available to allow the CBE to meet health, safety, legal compliance or critical infrastructure needs.
- The CBE will maintain the systems and processes that allow the CBE to attract, train, retain, and pay employees.
- Service units will support the Board of Trustees and their governance needs through the service unit's base operating budgets. Additional dollars have not been provided to support this work nor is that work funded from a transfer from the Board of Trustees' budget.
- The CBE will use reserves and one-time funding sources as a transitional measure to reduce the impacts on schools of the Provincial budget and subsequent transitional measures afforded by the increased flexibility provided by the Minister of Education on IMR funds.

### Revenue Assumptions

Alberta Education will fund the CBE as follows:

- Alberta Education maintains its enrolment growth funding which is based on projected enrolment at Sept. 30.

Other revenue assumptions are:

- The CBE will calculate provincial funding using the funding formula provided based on 2019-20 enrolment.
- The CBE will apply Alberta Education targeted/restricted funding for the specified purpose (e.g. Transportation), except where Ministerial approval has been granted to use these funds differently (e.g. Infrastructure Maintenance and Renewal).

- Fees:
  - All revenue from Alberta Education related to transportation and instructional supplies and materials will continue to be fully applied to the cost of these services. The CBE's aim is to minimize or eliminate any contribution from the global budget to support fee-based programs and services, except where Ministerial approval has been provided.
  - Fee revenue for transportation and noon supervision will be used to fund the gap between Alberta Education funding and direct program costs, including waivers and uncollectable accounts.
  - Noon supervision and transportation fees will be increased, as necessary due to increased costs of providing those services.
- Opportunities to grow non-Alberta Education revenue will be explored where it is consistent with the CBE's vision and values.
- The CBE 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 added to capital reserves and 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 returns, if any, will be directed to enhancing student outcomes.

## Expense Assumptions

Expense assumptions are:

- The budget will ensure that the CBE is able to comply with all conditions within Provincial legislation and 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 its unions and associations<sup>1</sup>.
- While Alberta Education has reduced funding for 2019-20, the CBE continues to experience non-discretionary cost increases (such as for contractual obligations), which have been reflected in the expense projections.
- Budget addition requests critical to supporting the changing needs and priorities of the CBE have been incorporated in the calculation of the status quo budget gap.

<sup>1</sup> The two Staff Association collective agreements and the Canadian Union of Public Employees agreement will expire Aug. 31, 2020. The Trades agreement will expire on Aug. 31 2021.

- The CBE has system administration costs of approximately 3.4 per cent (at Aug. 31, 2019) that will remain within the provincially mandated cap of 3.6 per cent of total expenditures.
- The CBE will continue to work with the Provincial Government and other school jurisdictions to identify cost savings strategies where opportunities exist.
- The CBE will follow the provincial lead as it relates to salaries and benefits.
- The CBE runs several programs that are considered external to the kindergarten to Grade 12 mandate for which the CBE is funded. This includes the International Student Program, continuing education as well as adult language training. Both direct and indirect costs have been fully allocated to these programs to ensure they are operating on a full cost-recovery basis.

### Reserve Assumptions

The Board of Trustees has final authority on the deployment of reserves and therefore these assumptions are subject to ultimate approval by the Board of Trustees.

- The budget will be based on the assumption that the CBE will end the 2019-20 school year with operating reserves of approximately \$4.2 million and \$5.4 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 historical activity, the CBE spends approximately \$0.7 million to commission an elementary school, \$1.0 million for a middle school and \$3.9 million for a high school.

Given the above, the CBE anticipates an allocation of up to \$10.0 million in operating reserves to balance the budget.

### Capital Assumptions

The CBE appreciates that the Provincial Government is funding increased enrolment and is building the school facilities necessary to accommodate this growth.

While good news for students, families and communities, each new school announcement requires the CBE to find additional funds beyond those provided by the province for furniture, fixtures and equipment. These commissioning costs include preparing the learning environment with learning resources, 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 and make pre-opening curricular decisions. Based on this experience, the upcoming new schools will require additional resources.

The 2019-20 budget will include an investment in board-funded capital to support the maintenance of systems and learning spaces as well as the replacement of vehicles, equipment and technology hardware. Even with the use of board funded capital dollars to achieve a balanced budget CBE administration feels sufficient capital funding remains to meet the most critical needs.



## Appendix VII: Risks

### Operational Risks

- Due to the complications associated with downsizing service units mid school-year there is an increased risk of system or process error or failure.
- Deferred maintenance backlog continues to grow and unforeseen equipment failures may require unplanned resource reallocation.
- Further reduced service unit budgets may mean limited capacity for providing service to the system that are required in the normal course of operations or as a project. Risk that work slows, does not get done or impacts schools.
- Costs increase beyond those anticipated in the budget requiring further prioritization decisions mid year.

### Financial & Operational Compliance

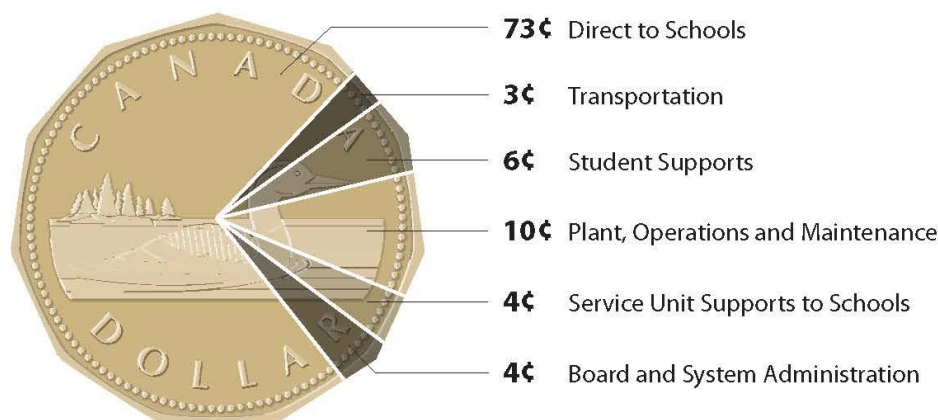
- Due to the speed at which this major budget re-adjustment had to be made there is an increased risk of a material variance between budget and the end of the year actual results, up to and including a potential deficit.
- Due to the mid-year changes there is an increased risk of non-compliance with some Operational Expectation indicators. For example, due to time constraints staff may not have been involved as desired in decisions that will impact them.
- Reserve balances are well below Alberta Education guidelines so there is an increasing risk of unforeseen events arising that CBE is unable to mitigate.
- Funding & assurance review brings uncertainty to future budget years with fewer resources to adapt and implement changes.
- Public perception and feedback results in changes to programs and services that are not within the mandate of the jurisdiction.
- The CBE will continue to be below the provincially mandated board and system administration cap of 3.6 per cent. However, long term contractual commitments with cost escalation clauses will put increased operational pressure on the CBE in the absence of increased funding.

### Staffing & Contractual Risks

- Due to the number of staffing positions impacted through this process there is an increased risk of challenge under the provisions of the various collective agreements.
- Due to significant change across the public education sector there is an increased risk of higher than projected attrition from key positions, both in schools and service units.



## Dividing the Dollar: How Every Cent of Alberta Education Funding Supports CBE Schools



### 73¢ | Direct to Schools

Money is provided to schools via a process the CBE calls RAM (Resource Allocation Method).

- The RAM is used to allocate resources equitably
- Principals make decisions on how to use money from the RAM to meet learning outcomes and the unique needs of students within their schools
- Includes teacher and staff salaries and benefits as well as the contractual obligation of teachers' pensions
- Instructional supplies and materials
- Custodial services for healthy learning environments

### 6¢ | Student Supports

Such as:

- Psychologists
- Occupational and physical therapists
- Cultural diversity advisors
- Speech language pathologists
- Braille assistants

### 4¢ | Service Unit Supports to Schools

Centrally provided services that increase efficiencies, effectiveness and economical savings:

- Instructional and programming support provided to teachers and schools
- Indigenous education
- School health
- Off-campus learning programs
- High school success initiatives
- School nutrition

### 3¢ | Transportation

Transportation for 34,500 students, including those with exceptional and special needs. Includes supports such as:

- Busing aides
- Charter service
- Attendants
- Licensed Practical Nurses
- Calgary Transit passes
- Taxi/ Handi-Bus service

### 10¢ | Plant, Operations and Maintenance

- Facility maintenance
- Repairs
- Utilities
- Insurance
- Amortization for provincially funded new schools, modulars, and modernization

### 4¢ | Board and System Administration

- Technology services and support, including safeguarding student data and CBE networks
- Communications and community engagement, including website administration and school/ school council communication assistance
- Financial supply chain management
- Legal services
- Payroll and benefits administration
- Board of Trustees and superintendents who provide the overall direction to the system

For more information, see: [cbe.ab.ca/budget](https://cbe.ab.ca/budget)

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**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:

<b>Revenues</b>	
Alberta Education	<ul style="list-style-type: none"> <li>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.</li> </ul>
Fees	<ul style="list-style-type: none"> <li>Fees charged to parents for transportation, noon supervision as well as other fees charged directly by schools.</li> </ul>
Other sales and services	<ul style="list-style-type: none"> <li>Adult, international student and continuing education fees as well as revenues from the provision of sales and services.</li> </ul>
Other revenue includes	<ul style="list-style-type: none"> <li>Delivering important information and training to schools on complex legal and privacy issues.</li> <li>Investment income - Interest, dividends and realized gains on the sale of investment.</li> <li>All other revenue - Gifts and donations, fundraising and rental of facilities.</li> <li>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.</li> <li>Other - Government of Alberta - All revenues sourced from other Ministries of the Government of Alberta.</li> </ul>
<b>Expenditures by object</b>	
Salaries and benefits	<ul style="list-style-type: none"> <li>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.</li> </ul>
Services, contracts supplies	<ul style="list-style-type: none"> <li>Cost of supplies, materials and services rendered.</li> </ul>
Other (amortization, interest, uncollectible accounts)	<ul style="list-style-type: none"> <li>Amortization of tangible capital assets, interest and financing charges and uncollectible accounts (bad debts) expense.</li> </ul>

<b>Expenditures by program/block</b>	
Instruction: early childhood services	<ul style="list-style-type: none"> <li>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.</li> </ul>
Instruction: grades 1 – 12	<ul style="list-style-type: none"> <li>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.</li> </ul>
Board & system administration	<ul style="list-style-type: none"> <li>Administration includes system-wide activities for the purpose of general regulation and direction of the affairs of the school jurisdiction.</li> </ul>
Transportation	<ul style="list-style-type: none"> <li>All direct activities related to transporting students to and from school and the support to run the program is included in Transportation.</li> </ul>
Plant operations and maintenance	<ul style="list-style-type: none"> <li>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.</li> </ul>
External services	<ul style="list-style-type: none"> <li>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.</li> </ul>



School based staff include but not limited to:

- Principals
- Teachers
- Learning Leaders
- Teaching Assistants, etc

Non-school based staff include but not limited to:

- Psychologists
- Occupational and physical therapists
- Cultural diversity advisors
- Speech language pathologists
- Braille assistants
- Education directors
- Financial supply chain management
- Payroll and benefits administration
- Transportation personnel
- Legal services
- Human resources personnel
- Facilities and environmental personnel
- Technology support specialists
- Superintendents
- Board of Trustees
- Communications and community engagement personnel

The following attachments are templates provided by Alberta Education and updated with the CBE's 2019-20 Fall Update information.

These will be submitted to Alberta Education following Board of Trustees approval.

While the totals are the same, some groupings may be different in some cases due to Alberta Education reporting requirements.

# 3030 Calgary School District No. 19

School Jurisdiction Code and Name

## FALL 2019 UPDATE TO THE 2019/2020 BUDGET: Page 1

	Fall 2019 Update to the Budget 2019/2020	Spring 2019 Budget Report 2019/2020	Variance	% Variance
<b>OPERATIONS (SUMMARY)</b>				
<b>Revenues</b>				
Alberta Education	\$1,255,088,000	\$1,308,551,000	(\$53,463,000)	-4.1%
Alberta Infrastructure	\$0	\$0	\$0	0.0%
Other - Government of Alberta	\$124,000	\$124,000	\$0	0.0%
Federal Government and First Nations	\$2,990,000	\$3,141,000	(\$151,000)	-4.8%
Other Alberta school authorities	\$309,000	\$309,000	\$0	0.0%
Out of province authorities	\$0	\$0	\$0	0.0%
Alberta municipalities - special tax levies	\$0	\$0	\$0	0.0%
Property taxes	\$0	\$0	\$0	0.0%
Fees	\$49,156,000	\$45,553,000	\$3,603,000	7.9%
Other sales and services	\$20,298,000	\$20,093,000	\$205,000	1.0%
Investment income	\$3,401,000	\$1,682,000	\$1,719,000	102.2%
Gifts and donation	\$7,386,000	\$7,256,000	\$130,000	1.8%
Rental of facilities	\$4,444,000	\$4,444,000	\$0	0.0%
Fundraising	\$2,700,000	\$2,700,000	\$0	0.0%
Gain on disposal of capital assets	\$0	\$0	\$0	0.0%
Other revenue	\$377,000	\$546,000	(\$169,000)	-31.0%
<b>Total revenues</b>	<b>\$1,346,273,000</b>	<b>\$1,394,399,000</b>	<b>(\$48,126,000)</b>	<b>-3.5%</b>
<b>Expenses By Program</b>				
Instruction - Early Childhood Services	\$43,078,000	\$42,279,000	\$799,000	1.9%
Instruction - Grades 1 - 12	\$1,046,698,000	\$1,067,622,000	(\$20,924,000)	-2.0%
Plant operations and maintenance	\$160,026,000	\$171,375,000	(\$11,349,000)	-6.6%
Transportation	\$50,537,000	\$48,610,000	\$1,927,000	4.0%
Board & system administration	\$48,988,000	\$48,974,000	\$14,000	0.0%
External services	\$31,223,000	\$30,141,000	\$1,082,000	3.6%
<b>Total Expenses</b>	<b>\$1,380,550,000</b>	<b>\$1,409,001,000</b>	<b>(\$28,451,000)</b>	<b>-2.0%</b>
<b>Annual Surplus (Deficit)</b>	<b>(\$34,277,000)</b>	<b>(\$14,602,000)</b>	<b>(\$19,675,000)</b>	<b>-134.7%</b>
<b>Expenses by Object</b>				
Certificated salaries & wages	\$667,217,000	\$671,777,000	(\$4,560,000)	-0.7%
Certificated benefits	\$147,858,000	\$152,195,000	(\$4,337,000)	-2.8%
Non-certificated salaries & wages	\$208,749,000	\$210,514,000	(\$1,765,000)	-0.8%
Non-certificated benefits	\$52,564,000	\$52,274,000	\$290,000	0.6%
Services, contracts and supplies	\$224,467,000	\$242,433,000	(\$17,966,000)	-7.4%
Amortization expense - supported	\$45,058,000	\$45,094,000	(\$36,000)	-0.1%
Amortization expense - unsupported	\$28,161,000	\$29,312,000	(\$1,151,000)	-3.9%
Interest on capital debt - supported	\$24,000	\$24,000	\$0	0.0%
Interest on capital debt - unsupported	\$409,000	\$409,000	\$0	0.0%
Other interest and finance charges	\$1,165,000	\$1,039,000	\$126,000	12.1%
Losses on disposal of tangible capital assets	\$0	\$0	\$0	0.0%
Other expenses	\$4,878,000	\$3,930,000	\$948,000	24.1%
<b>Total Expenses</b>	<b>\$1,380,550,000</b>	<b>\$1,409,001,000</b>	<b>(\$28,451,000)</b>	<b>-2.0%</b>
<b>Accumulated Surplus from Operations (Projected)</b>				
Accumulated Surplus from Operations - August 31, 2019	\$22,995,000	\$27,028,000	(\$4,033,000)	-14.9%
Accumulated Surplus from Operations - August 31, 2020	\$4,195,000	\$22,427,000	(\$18,232,000)	-81.3%
Capital Reserves - August 31, 2019	\$15,887,000	\$11,210,000	\$4,677,000	41.7%
Capital Reserves - August 31, 2020	\$10,409,000	\$6,210,000	\$4,199,000	67.6%
<b>Certificated Staff FTE's</b>				
School based	6,672.9	6,692.6	(19.7)	-0.3%
Non-school based	124.5	129.0	(4.5)	-3.5%
<b>Total Certificated Staff FTE's</b>	<b>6,797.4</b>	<b>6,821.6</b>	<b>(24.2)</b>	<b>-0.4%</b>
<b>Non-Certificated Staff FTE's</b>				
Instructional	2,113.7	2,174.1	(60.4)	-2.8%
Plant operations & maintenance	802.7	806.4	(3.7)	-0.5%
Transportation	14.0	43.3	(29.3)	-67.7%
Other non-instructional	407.0	412.5	(5.5)	-1.3%
<b>Total Non-Certificated Staff FTE's</b>	<b>3,337.4</b>	<b>3,436.4</b>	<b>(99.0)</b>	<b>-2.9%</b>

### Attestation of Secretary-Treasurer/Treasurer:

This information was formally received by the Board of Trustees at the meeting held on : \_\_\_\_\_

# 3030 Calgary School District No. 19

School Jurisdiction Code and Name

## FALL 2019 UPDATE TO THE 2019/2020 BUDGET: Page 2

	Fall 2019 Update to the Budget 2019/2020	Spring 2019 Budget Report 2019/2020	Variance	% Variance
<b>FEE &amp; SALES TO PARENTS &amp; STUDENTS</b>				
<b>Fees</b>				
Transportation	\$7,410,000	\$4,892,000	\$2,518,000	51.5%
Basic instruction supplies	\$0	\$0	\$0	0.0%
Lunchroom Supervision & Activity Fees	\$15,147,000	\$14,062,000	\$1,085,000	7.7%
Technology user-fees	\$0	\$0	\$0	0.0%
Alternative program fees	\$635,000	\$635,000	\$0	0.0%
Fees for optional courses	\$2,949,000	\$2,949,000	\$0	0.0%
ECS enhanced program fees	\$0	\$0	\$0	0.0%
Activity fees	\$17,705,000	\$17,705,000	\$0	0.0%
Other fees to enhance education	\$0	\$0	\$0	0.0%
Extra-curricular fees	\$4,659,000	\$4,659,000	\$0	0.0%
Non-curricular supplies, materials, and services	\$651,000	\$651,000	\$0	0.0%
Non-curricular travel	\$0	\$0	\$0	0.0%
Other fees	\$0	\$0	\$0	0.0%
Total fees	\$49,156,000	\$45,553,000	\$3,603,000	7.9%
<b>Other Sales to Parents &amp; Students</b>				
Cafeteria sales, hot lunch, milk programs	\$0	\$0	\$0	0.0%
Special events	\$0	\$0	\$0	0.0%
Sales or rentals of other supplies / services	\$200,000	\$200,000	\$0	0.0%
Out of district student revenue	\$0	\$0	\$0	0.0%
International and out of province student revenue	\$11,167,000	\$10,889,000	\$278,000	2.6%
Adult education revenue	\$1,602,200	\$1,602,000	\$200	0.0%
Preschool	\$0	\$0	\$0	0.0%
Child care & before and after school care	\$0	\$0	\$0	0.0%
Lost item replacement fees	\$0	\$0	\$0	0.0%
Bulk Supply Sales	\$0	\$0	\$0	0.0%
Foreign Tuition	\$0	\$0	\$0	0.0%
Music Instruments, library fees, commissions	\$0	\$0	\$0	0.0%
Other (Describe)	\$0	\$0	\$0	0.0%
Other sales (describe here)	\$0	\$0	\$0	0.0%
Other sales (describe here)	\$0	\$0	\$0	0.0%
Total other sales	\$12,969,200	\$12,691,000	\$278,200	2.2%
<b>Grades 1 - 12</b>				
Eligible funded students - Grades 1 to 9	84,620.0	83,801.0	819.0	1.0%
Eligible funded students - Grades 10 to 12	30,235.0	31,054.0	(819.0)	-2.6%
Other students	1,431.0	1,293.0	138.0	10.7%
Home ed and blended program students	195.0	267.0	(72.0)	-27.0%
Total Enrolled Students, Grades 1-12	116,481.0	116,415.0	66.0	0.1%
<b>Early Childhood Services (ECS)</b>				
Eligible funded children - ECS	9,327.0	8,885.0	442.0	5.0%
Other children	-	-	-	0.0%
Program hours	475.0	475.0	-	0.0%
ECS FTE's Enrolled	4,663.5	4,442.5	221.0	5.0%

### Attestation of Secretary-Treasurer/Treasurer:

This information was formally received by the Board of Trustees at the meeting held on :

## 3030 Calgary School District No. 19

School Jurisdiction Code and Name

### FALL 2019 UPDATE TO THE 2019/2020 BUDGET

#### Comments/Explanations of changes from original Spring 2019/2020 Budget Report:

##### Explain any changes in revenue or fee items >5% (any highlighted items in cells S10-S25 on Page 1 or cells S10 - S22 and S26 - S40 on Page 2):

Change in interest revenue is due to change in the forecasted interest rate

Change in other revenue is due to updated expected revenue for multiple programs and enrolment growth

##### Explain any changes in program expenses >5% (any highlighted items in cells S28 - S33 on Page 1):

Change in Plant, Operations and Maintenance is due to the reallocation of IMR funds as approved by the Minister on Dec. 2, 2019.

##### Explain any changes in expenses by object >5% (any highlighted items in cells S38 - S49 of Page 1):

Changes in services, contracts and supplies is based on the Resource Allocation Method used to distribute funding to schools. One of the balancing strategies was a reduction in funding allocated to schools.

Changes in Other interest and finance charges is due a higher estimate of transaction fees

Other expenses has increased due to CBE's implementation of the same \$365 transportation fee on students who previously rode for free. The increase is due to an increase in waiver and uncollectibles

##### Explain any changes in projected Accumulated Operating Surplus and Capital Reserves as at August 31, 2019 or August 31, 2020 by >5% (any highlighted items in cells S53 - S56 on Page 1):

The change in accumulated operating surplus is due to changes from the budget assumptions thus required the modified balancing strategies in the fall

The change in capital reserves is due to a draw to fund project carry forwards

##### Explain change in total certificated staff >3% (if cell S59 or S60 on Page 1 is highlighted) or non-certificated staff >3% (any highlighted items in cells S64 - S67 on Page 1):

Change in Transportation block is due to a redistribution of bus aide resources between the transportation and instruction block.

##### Explain change in enrolment >3% (if cell S48 or cell S54 on Page 2 is highlighted):

An increase of ECS students higher than projected enrolment