




Edmonton School District No. 7  
One Kingsway  
Edmonton, Alberta

McCauley Chambers  
Tuesday, November 29, 2016  
2:00 p.m.

**Board Meeting #4**

- A. O Canada 
- B. Roll Call
- C. Approval of the Agenda
- D. Communications from the Board Chair
- E. Communications from the Superintendent of Schools
- F. Minutes:
  - 1. DRAFT – Board Meeting – November 1, 2016
- G. Comments from the Public and Staff Group Representatives  
*(NOTE: Pre-registration with the Board Office [780-429-8443] is required by 4:30 p.m. on Monday, November 28, 2016 to speak under this item.)*
- H. Reports:
  - 2. Strategic Plan Update – Success for All Students - Numeracy (Information) *Note: 30 minutes is required for this item.*
  - 3. Edmonton Public Schools' combined Three-Year Education Plan and Annual Education Results Review Report (2015-2016) (Recommendation) *Note: 40 minutes is required for this item.*
  - 4. Audited Financial Statements 2015-2016 (Recommendation)
  - 5. Proposed Distribution of 2015-2016 District Surplus (Recommendation)
  - 6. Fall Update to the Revised 2016-2017 Budget (Recommendation)
- I. Other Committee, Board Representative and Trustee Reports
- J. Trustee and Board Requests for Information
- K. Notices of Motion
- L. Meeting Dates
- M. Adjournment

**BOARD OF TRUSTEES**

Michael Janz  
Board Chair

Michelle Draper  
Board Vice-Chair

Sherry Adams  
Orville Chubb  
Ken Gibson  
Nathan Ip  
Cheryl Johner  
Ray Martin  
Bridget Stirling

# AGENDA

**MINUTE BOOK****Board Meeting #3**

Minutes of the Board Meeting of the Trustees of the Edmonton School District No. 7 of the Province of Alberta held in McCauley Chambers in the Centre for Education on Tuesday, November 1, 2016 at 2:00 p.m.

**Present:****Trustees**

Orville Chubb  
Ken Gibson

Nathan Ip  
Cheryl Johner

Ray Martin  
Bridget Stirling

**Officials**

Lisa Austin  
Todd Burnstad  
Grace Cooke  
Ron MacNeil

Kathy Muhlethaler  
Lorne Parker  
Kent Pharis  
Madonna Proulx

Leona Morrison  
Darrel Robertson  
Sandra Stoddard  
Mike Suderman

**Acting Board Chair:** Ken Gibson

**Recording Secretary:** Shirley Juneau

**Staff Group Representatives**

CUPE Local 3550 – Carol Chapman-President, Janis Zielke-Vice-President and Gloria Lepine - Chief Steward

CUPE Local 474 – John Vradenburgh, President

The Acting Board Chair called the meeting to order with recognition that we are on Treaty 6 Territory, a traditional meeting grounds, gathering place, and travelling route to the Cree, Saulteaux, Blackfoot, Métis, Dene and Nakota Sioux. We acknowledge all the many First Nations, Métis, and Inuit whose footsteps have marked these lands for centuries.

The Acting Board Chair advised that the firm alarm system at the Centre for Education is a Two Stage alarm system. Stage One is a single repeating alarm tone indicating a warning only and that evacuation is not required. Stage Two is a triple repeating alarm tone indicating that evacuation is required.

**A. Roll Call:** (2:00 p.m.)

The Superintendent advised that Trustees Draper and Janz were absent. All other Trustees were present.

## **MINUTE BOOK**

### **B. Approval of the Agenda**

**MOVED BY Trustee Ip:**

**“That the agenda for the November 1, 2016 board meeting be approved as printed.”  
(UNANIMOUSLY CARRIED)**

### **C. O Canada - Vimy Ridge Academy**

### **D. Remembrance Ceremony**

#### **1. Vimy Ridge Academy Remembrance Ceremony**

Vimy Ridge Academy conducted a Remembrance Ceremony.

### **E. Communications from the Board Chair**

The Board Chair was not available for this meeting.

### **F. Communications from the Superintendent of Schools**

The Superintendent shared that the Harry Hole Community Policing Award was given to two outstanding Edmontonians for their leadership in supporting community policing, crime prevention and community problem-solving initiatives. The Superintendent was pleased to announce that Mr. Fred Hines, Principal of amiskwacyi Academy was a winner of the Harry Hole Award for 2016.

The Superintendent reported that he had the pleasure of speaking at the Council of School Representatives; Alberta Teachers Association Local 37's meeting.

The Superintendent reported that along with Trustee Martin they had the pleasure of bringing greetings at the Alberta Teachers Association Local 37's New Teacher Induction ceremony.

The Superintendent had the pleasure of attending the Dr. Margaret Ann Armour school opening on October 27, 2016.

The Superintendent reported that he attended 13 Catchment Results Review where he had the opportunity to meet with the principals. The Superintendent shared that the District has very committed staff that go above and beyond in service of children. He explained that schools are examining evidence based strategies; involving on-going job embedded professional development as a means to build collective capacity to address the complex needs in the District's classrooms.

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### **G. Minutes**

1. Board Meeting #2 – October 18, 2016

#### **MOVED BY Trustee Johner:**

**“That the minutes of Board Meeting #2 held October 18, 2016 be approved as printed.” (UNANIMOUSLY CARRIED)**

### **H. Comments from the Public and Staff Group Representatives**

There were no registered speakers for this item.

### **I. Reports**

2. Strategic Plan Update – Success for All Students - Literacy

The Trustees received a presentation regarding the success for all students.

3. Strategic Plan Update – Success Beyond Schooling

The Trustees received a presentation regarding success beyond schooling.

Trustee Chubb left the meeting at this point.

### **J. Other Committee, Board Representatives and Trustee Reports**

Trustee Johner thanked the Superintendent for the invitation to attend catchment results review. She shared that the catchment results review is a new process that will serve both to improve and reinforce the District's commitment to its priorities and strategic goals.

Trustee Johner shared that she attended the grand opening of the Roberta McAdams School.

Trustee Johner reported that the Academy at King Edward has raised \$1,340 for the Edmonton Public Schools Foundation. To date, \$5,950 has been raised for the Sandra Woitas Scholarship Fund and that the Edmonton Civic Employees' Charitable Assistance Fund gifted \$48,200 for full-day Kindergarten schools to purchase items such as backpacks, shoes, winter clothes and fund field trips.

Trustee Stirling thanked the junior high hockey students at Vimy Ridge Academy for their fundraising efforts to benefit students at Delton School. She explained that the project began when Dao Haddad at Delton asked whether Vimy students could raise money to purchase Oil Kings tickets for 50 children at Delton. Vimy Ridge teacher Curtis Ogrodiuk took up the

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challenge, reaching out to Oil Kings head coach Steve Hamilton (a former Vimy Ridge teacher) and to the hockey teaching team, who pitched the project to the 150 junior high hockey students, telling the students that they needed to raise \$600 to buy the tickets. The Vimy Ridge students went above and beyond, raising \$3141.05 in just four days and gathering more than 100 items of winter clothing for kids who needed warm gear to wear.

Trustee Stirling reported that on October 18, 2016 she was pleased to attend the Ottewell School's School Council meeting. On October 18, 2016, Trustee Stirling also joined the Minister of Advanced Education, Marlin Schmidt, in touring McNally School to observe some of the Career Pathways work at the school.

Trustee Stirling stated that on October 21, 2016 the Metro Continuing Education's English Language students partnered with local chefs from the Edmonton Chefs Association to celebrate International Chefs Day. The *Art on a Plate* event featured crafts and activities from around the world and was planned by the students. She shared that more than 600 students and their families attended the event, joined by special guests including Member of Parliament Linda Duncan. Trustee Stirling thanked the Edmonton Chefs Association for their generous support of this event.

Trustee Stirling reported that on October 26, 2016 Trustees Ip and Janz joined her in welcoming parents and community members to the annual Alberta School Councils Association (ASCA) training which was hosted at the Centre for Education. Trustee Stirling thanked the ASCA and District staff for organizing the opportunity for school council members to learn more about their role as important partners in education.

Trustee Stirling shared that she was attended the celebration of the opening of Dr. Margaret-Ann Armour School along with other Trustees, representatives of all orders of government, District and school staff, families, community members, and friends of Dr. Armour.

**K. Trustee and Board Requests for Information - None**

**L. Notices of Motion**

**MOVED BY Trustee Gibson:**

**"That notice of motion be waived."**

**(UNANIMOUSLY CARRIED)**

**MOVED BY Trustee Martin:**

**"That, the Board authorizes a medical absence for Trustee Sherry Adams effective November 1, 2016 through to January 31, 2017."**

**(UNANIMOUSLY CARRIED)**

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M. **Next Board Meeting Date:** Tuesday, November 15, 2016 at 2:00 p.m.

N. **Adjournment** (4:40 p.m.)

**The Acting Board Chair** adjourned the meeting.

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Ken Gibson, Acting Board Chair

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Dr. Sandra Stoddard, Executive Director  
Governance and Strategic Support  
Services/Corporate Secretary

**DATE:** November 29, 2016

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Strategic Plan Update: Priority 1 Goal Two: Success for Every Student—Numeracy

**ORIGINATOR:** Dr. Sandra Stoddard, Executive Director, Governance, Strategic Services and Support for Schools

**RESOURCE**

**STAFF:** Janice Aubry, Sanaa El-Hassany, Sonia Boctor, Sherelyn Caderma, Pina Chiarello, Patti Christensen, Blythe Evans, Greg McNulty

**REFERENCE:** N/A

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## ISSUE

The purpose of this report is to provide the Board of Trustees with an update of the District's Strategic Plan for Priority 1 Goal Two: Success for Every Student—with a focus on numeracy. Using information and data from Alberta Education's Accountability Pillar Provincial Achievement Tests (PATs), Provincial Diploma Examinations, the District's Math Intervention Programming Initiative (MIPI) and additional initiatives that support Priority 1 Goal Two, this report focuses on areas of success and areas for growth, and is part of Administration's commitment to providing the Board of Trustees with ongoing updates on progress relative to the District Strategic Plan. This analysis will also help to inform the District's direction for the 2016-2017 operational year.

## BACKGROUND

In 2014, Edmonton Public Schools formally launched its District Strategic Plan for the 2014-2018 term. The District Strategic Plan has three priorities with ten supporting goals and outcomes. The plan serves to provide common direction and alignment between the work of the Board of Trustees, the Superintendent, and District staff. The plan provides the foundation for a District culture of evidence-based decision making, assurance, and accountability.

In 2015, the District joined Alberta Education's Assurance Pilot Project. The Assurance Model provides a framework for the District to report directly on how we are doing relative to the goals and outcomes in its 2014-2018 Strategic Plan. Before participating on the pilot project, the District reported annual education results based on outcomes in Alberta Education's Business Plan. Reporting on the District's Strategic Plan creates clarity and congruence as it enables the District to report results for one set of outcomes rather than two.

## CURRENT SITUATION

Each year, Alberta Education requires school jurisdictions to submit a Three-Year Education Plan (3YEP) and an Annual Education Results Report (AERR) by November 30. The 3YEP/AERR reports the results from all ten of the goals and outcomes in the District's Strategic Plan from the previous school year, and highlights the District's strategies to advance its strategic priorities over the next three years.

This year, with the flexibility afforded through the Assurance Pilot, the District has established a new Assurance and Public Board reporting cycle in support of completing the AERR/3YEP. For the 2016-2017 school year, at each public board meeting, a high level overview and an analysis of results for one or two District Strategic Plan goals and outcomes will be presented. Trustees felt that reporting on one or two goals versus the entire Strategic Plan would allow them to engage in more meaningful dialogue on results and strategies for moving forward thus demonstrating greater assurance and transparency to the public. Consequently, a monthly reporting cycle, with links to the AERR report, was developed to achieve the following outcomes:

- Establish a planning and reporting cycle that considers when local and provincial data is available for analysis and to inform timely decisions.
- Use evidence to inform programming decisions that promote success for all students.
- Support a cycle of continuous improvement and reinforce how results and data drive District planning and reporting.
- Interpret and report on results in a manner that demonstrates assurance and transparency.

For this report, data has been gathered from four key sources: PATs, Provincial Diploma Examinations, and the District's MIPI. Results are provided for the District overall, and for elementary, junior high, and high school students.

At the provincial level, students in Grades 6 and 9 write PATs and high school students write Diploma examinations. The results from these tests provide the District with a snapshot of our students' progress toward achieving the student learning outcomes of the Alberta Programs of Study. Additionally, each year, students in Grades 2–9 participate in the District MIPI—a screening tool created by District teachers and principals to provide initial information about student progress with foundational outcomes in mathematics and support the identification of students who may require interventions with math concepts.

## KEY POINTS

- The Strategic Plan Update: Success for Every Student—Numeracy report (Attachment I) provides information, data and descriptions of initiatives highlighting areas of success and growth relevant to the District Strategic Plan.
- The Strategic Plan Update: Success for Every Student—Numeracy report contains data gathered from three key sources: PATs, Provincial Diploma Examinations, the Accountability Pillar and the District MIPI.

## ATTACHMENTS and APPENDICES

ATTACHMENT I Strategic Plan Update—Numeracy

SB: sb

## Strategic Plan Update: Success for Every Student—Numeracy

### INTRODUCTION

Confidence and competence in numeracy provide the foundations for lifelong learning. In all aspects of daily life, including making the best choices, we rely on mathematical data, projections, inferences and systematic thinking. That is why numeracy, like literacy, is so fundamental. Numeracy enables one to develop logical thinking and reasoning strategies in daily life. It is a necessary skill that supports problem solving and the ability to make sense of time, numbers, patterns and shapes.

As a result, Edmonton Public Schools has identified *Success for Every Student* as a key goal in the District Strategic Plan, with the targeted outcome that *more students demonstrate growth and achieve student learning outcomes, with a specific focus on literacy and numeracy*. This priority in our Strategic Plan ensures that as students move through Kindergarten to Grade 12 they are provided multiple opportunities to refine their numeracy skills to support them in gaining access to learning and experiencing success in life (please note that literacy was the focus of the November 1, 2016 Strategic Plan Update report).

District students participate in annual assessments and testing to ensure information is available to District, schools and teachers. This information supports effective programming and evidence-based decision making. At the provincial level, students in Grades 6 and 9 write PATs and high school students write Diploma exams for mathematics every year. The results from these tests provide the District with a snapshot of our students' progress toward achieving the Alberta Program of Study's student learning outcomes.

Additionally, each year, students in Grades 2–9 participate in the District MIPI—a locally-developed screening tool created by District teachers and principals to provide initial information about student progress with foundational outcomes in mathematics and support the identification of students who may require interventions with math concepts. Together, these assessments provide valuable information for teachers, administrators, parents, students and the District relative to progress being made, and flag students who may require intervention supports.

The purpose of this report is to provide the Board of Trustees with an update on the progress the District is making in achieving its outcome relative to growth in numeracy. The first section of this report highlights the results of the Key Performance Indicator data. The second section provides an analysis of the results of the Key Performance Indicators. The section begins with background information, including the context of today's classrooms, followed by an analysis of strengths and potential opportunities for growth. The third section of this report provides further discussion about the areas of strength including possible strategies implemented in the 2015-2016 school year that may account for the growth. Additionally, section four highlights priority strategies that will be in place for the 2016-2017 school year to address potential areas for improvement.

## SECTION ONE: KEY PERFORMANCE INDICATORS (KPIs) FOR PRIORITY I GOAL TWO: SUCCESS FOR EVERY STUDENT—NUMERACY

Outlined below is a summary of the data for KPIs in the area of numeracy. The results highlight data for the past five years in order to support the District in conducting a trend analysis. As well, Alberta Education has provided an evaluation that summarizes overall improvement for each of the overall District results on the Accountability Pillar data. This has been included for interpretation purposes.

Where possible, the data is further disaggregated to enable the examination of numeracy achievement for First Nations, Métis and Inuit students, English language learners, and students in need of specialized supports and services. It is important to note that a more detailed analysis of achievement data with respect to closing the achievement gap for our First Nations, Métis and Inuit students will be coming as a Strategic Plan Update report to public board on December 13, 2016.

Key Performance Indicator		Results (in percentages)					Evaluation
		2012	2013	2014	2015	2016	Improvement
<b>NUMERACY</b>							
Overall percentage of students in Grades 6 who achieved the acceptable standard in Math on Provincial Achievement Tests. (Source: Accountability Pillar)	Overall (n = )	76.3 (5164)	76.9 (5294)	77.4 (5578)	76.2 (5910)	75.6 (5976)	Declined
	ELL (n = )	65.0 (774)	68.9 (960)	74.2 (1304)	71.1 (1490)	73.0 (1145)	+
	FNMI (n = )	54.7 (497)	55.3 (497)	51.0 (498)	51.1 (544)	55.1 (544)	+
	Specialized Supports (n = )	53.9 (890)	55.1 (936)	53.7 (977)	49.3 (922)	53.7 (935)	+
Overall percentage of students in Grades 6 who achieved the standard of excellence in Math on Provincial Achievement Tests. (Source: Accountability Pillar)	Overall (n = )	18.9 (5164)	21.0 (5294)	20.5 (5578)	18.2 (5910)	17.9 (5976)	Declined Significantly
	ELL (n = )	13.0 (774)	17.5 (960)	16.6 (1304)	14.9 (1490)	17.2 (1145)	+
	FNMI (n = )	4.0 (497)	3.8 (497)	4.0 (498)	5.5 (544)	5.3 (544)	-
	Specialized Supports (n = )	21.5 (890)	20.9 (936)	22.2 (977)	16.5 (922)	23.1 (935)	+
Overall percentage of students in Grades 9 who achieved the acceptable standard in Math on Provincial Achievement Tests. (Source: Accountability Pillar)	Overall (n = )	69.1 (5148)	71.3 (5362)	70.8 (5264)	70.2 (5532)	73.0 (5530)	Improved Significantly
	ELL (n = )	56.5 (359)	60.3 (579)	66.8 (784)	63.4 (1052)	69.3 (1045)	+
	FNMI (n = )	34.1 (464)	40.7 (523)	39.7 (527)	39.6 (485)	40.3 (461)	+
	Specialized Supports (n = )	23.5 (519)	24.4 (579)	30.0 (603)	44.9 (815)	46.9 (813)	+

Key Performance Indicator		Results (in percentages)					Evaluation
		2012	2013	2014	2015	2016	Improvement
Overall percentage of students in Grades 9 who achieved the standard of excellence in Math on Provincial Achievement Tests. (Source: Accountability Pillar)	Overall (n = )	24.1 (5148)	25.5 (5362)	24.2 (5264)	23.9 (5532)	24.6 (5530)	Maintained
	ELL (n = )	13.4 (359)	18.8 (579)	19.9 (784)	18.0 (1052)	19.0 (1045)	+
	FNMI (n = )	3.0 (464)	4.2 (523)	4.9 (527)	6.6 (485)	4.8 (461)	-
	Specialized Supports (n = )	2.5 (519)	3.1 (579)	6.8 (603)	26.6 (815)	26.3 (813)	=
Overall percentage of students who achieved the acceptable standard on Math 30-1 diploma examinations. (Source: Accountability Pillar)	Overall (n = )	n/a	78.4 (4381)	74.0 (4325)	76.1 (4187)	72.2 (4119)	Declined Significantly
	ELL (n = )	n/a	80.6 (273)	73.0 (355)	73.3 (524)	66.4 (610)	-
	FNMI (n = )	n/a	66.3 (89)	59.6 (99)	60.7 (89)	51.1 (90)	-
	Specialized Supports (n = )	n/a	69.0 (42)	69.2 (39)	61.0 (41)	55.1 (49)	-
Overall percentage of students who achieved the acceptable standard on Math 30-2 diploma examinations. (Source: Accountability Pillar)	Overall (n = )	n/a	70.8 (1941)	71.3 (2139)	76.0 (2279)	79.1 (2396)	Improved Significantly
	ELL (n = )	n/a	58.4 (137)	62.7 (185)	71.5 (291)	69.0 (332)	-
	FNMI (n = )	n/a	66.3 (86)	63.7 (102)	69.6 (102)	75.6 (127)	+
	Specialized Supports (n = )	n/a	58.6 (58)	56.7 (67)	57.4 (94)	69.5 (128)	+
Overall percentage of students who achieved the standard of excellence on Math 30-1 diploma examinations (overall results). (Source: Accountability Pillar)	Overall (n = )	n/a	33.3 (4381)	29.0 (4325)	33.1 (4187)	28.6 (4119)	Declined Significantly
	ELL (n = )	n/a	37.0 (273)	27.3 (355)	30.5 (524)	27.5 (610)	-
	FNMI (n = )	n/a	22.5 (89)	16.2 (99)	14.6 (89)	14.4 (90)	-
	Specialized Supports (n = )	n/a	9.5 (42)	20.5 (39)	19.5 (41)	22.4 (49)	+
Overall percentage of students who achieved the standard of excellence on Math 30-2 diploma examinations (overall results). (Source: Accountability Pillar)	Overall (n = )	n/a	10.6 (1941)	15.1 (2139)	18.3 (2279)	21.2 (2396)	Improved Significantly
	ELL (n = )	n/a	6.6 (137)	27.3 (355)	15.5 (291)	14.2 (332)	-
	FNMI (n = )	n/a	5.8 (86)	7.8 (102)	12.7 (102)	20.5 (127)	+
	Specialized Supports (n = )	n/a	5.2 (58)	6.0 (67)	9.6 (94)	7.8 (128)	-

Key Performance Indicator		Results (in percentages)					Evaluation
		2012	2013	2014	2015	2016	Improvement
<b>NUMERACY</b>							
Percentage of students who may need interventions based on the District's Math Intervention Programming Initiative (MIPI). (Source: MIPI) <i>Note: The MIPI was implemented in the 2014-2015 school for Grades 2 to 9, and was extended to include Grade 10 students in 2015-2016.</i>	Overall	n/a	n/a	28.0	24.5	24.8	maintaining

## SECTION TWO: ANALYSIS OF RESULTS

### Context of Results

As Edmonton's population continues to grow and change, so does diversity in our schools. Edmonton Public Schools classrooms today welcome and serve a wide range of students, including those new to Canada, children in need of specialized supports and services, and those self-identifying as First Nations, Métis, or Inuit. As well, our schools must support and program for students facing a range of socio-economic, social and emotional factors that may impact learning. The data presented in this report is gathered from various sources. It reflects the District's numeracy and mathematics results and future areas of focus that are identified to meet the needs of our diverse student population.

In the 2015-2016 school year, Edmonton Public Schools served a total of 92,227 students, including 8,044 students who self-identified as First Nations, Métis or Inuit, 11,779 students in need of specialized supports and services and 22,107 English language learners (ELLs) (as of September 30, 2015). This was an increase of 2,707 students overall and includes an increase of 165 First Nations, Métis and Inuit (FNMI) students, 506 students in need of specialized supports and services, and 1,703 English language learners. The increasing enrolment of students with diverse needs contributes to an increase in classroom complexity.

The following section provides an assessment of provincial data and local District data disaggregated for elementary, junior high and high school. Where possible, the data is analyzed to enable the examination of numeracy achievement for FNMI students, ELLs, and students in need of specialized supports and services. This level of information enables the District to further understand areas of strength and areas for growth to target improvement initiatives moving forward.

### Elementary: Grade 1–6 Analysis of Numeracy Data

#### Provincial Achievement Tests (PATs)

While both the District and the province showed a slight decrease in the percentage of students meeting the acceptable standard and the standard of excellence in the Grade 6 PATs in mathematics, the five year trend data shows the percentage of District students meeting the acceptable standard and the standard of excellence has remained consistently higher than that of the province. Overall, the percentage of District students meeting the acceptable standard in Grade 6 Mathematics decreased this year from 76.2 per cent to 75.6 per cent as compared to a decrease from 73.2 per cent to 72.2 per cent for the province. The percentage of District students meeting the standard of excellence in Grade 6 Mathematics decreased slightly this year from 18.2 per cent to 17.9 per cent as compared to a slight decrease from 14.1 per cent to 14.0 per cent for the province.

When the PAT data is disaggregated to reflect the achievement of ELLs, FNMI students and students in need of specialized support, trends in the data indicate that:

- The percentage of ELL students achieving the acceptable standard and the standard of excellence has shown positive growth over the past five years. In fact, results for our ELL students are almost on par this year with the overall District results.
- The percentage of FNMI students achieving the acceptable standard and the standard of excellence has shown improvement over the past five years. However, there continues to be a considerable observable achievement gap between the results for these students compared to the overall results for the District.
- The percentage of students in need of specialized supports and services who are achieving the acceptable standard improved from the previous year, but an achievement gap still exists as compared to the District. The percentage of students achieving the standard of excellence has shown an overall improvement over the past five years, with the results this year being higher than the overall results for the District. This is due to the fact that those high achieving students who are coded Gifted and Talented are included in this population.

### **Junior High: Grade 7–9 Analysis of Numeracy Data**

#### **Provincial Achievement Tests (PATs)**

Overall, the percentage of District students meeting the acceptable standard in Grade 9 Mathematics has shown significant improvement compared to the provincial results. The percentage increased this year from 70.2 per cent to 73.0 per cent as compared to an increase from 65.3 per cent to 67.8 per cent for the province. The percentage of District students meeting the standard of excellence in Grade 9 Mathematics increased this year from 23.9 per cent to 24.6 per cent as compared to a decrease from 17.9 per cent to 17.5 per cent for the province. Trends in the data over the past five years indicate that the percentage of District students meeting the acceptable standard and the standard of excellence in Grade 9 Mathematics has remained consistently higher than that of the province.

When the PAT data is disaggregated to reflect achievement of ELLs, FNMI students and students in need of specialized supports and services, trends in the data indicate that:

- The percentage of ELL students achieving the acceptable standard has shown significant improvement over the past five years and those achieving at the standard of excellence has remained relatively static. These results are noteworthy, considering this population of students has nearly tripled over the same time frame.
- The percentage of FNMI students achieving the acceptable standard has remained relatively static over the past four years with those achieving at the standard of excellence showing improvement. There continues to be an achievement gap compared to the overall results for the District.
- The percentage of students in need of specialized supports and services achieving the acceptable standard has shown improvement over the past five years, but an achievement gap still exists as compared to the District. This gap is to be expected as the majority of students have been identified as being below grade level and are on Individualized Program Plans. The percentage of students achieving the standard of excellence has shown a significant improvement over the past five years, with the results this year being higher than the overall results for the District. This is due to the fact that those high achieving students who are coded Gifted and Talented are included in this population.

## High School Analysis of Numeracy Data

### Diploma Examination—Mathematics

Overall, both the District and province showed a decrease in the percentage of students meeting the acceptable standard and standard of excellence in Mathematics 30-1 exams over the past five years. While the percentage of District students meeting the acceptable standard and the standard of excellence in Mathematics 30-1 is higher than the province, the District's results for students meeting the acceptable standard decreased from the previous year from 76.1 per cent to 72.2 per cent as compared to the province which decreased from 76.1 percent to 70.7 per cent. The percentage of District students meeting standard of excellence decreased from 33.1 per cent to 28.6 per cent compared to the province which decreased from 31.6 per cent to 25.9 per cent. Conversations with Alberta Education have revealed that the June 2016 Mathematics 30-1 exam has now met the standards for both the acceptable and the excellence levels. While reflecting on results, a future exam will serve as baseline for comparison.

When the Mathematics 30-1 data is disaggregated to reflect achievement of ELLs, FNMI students and students in need of specialized supports and services, the data compared to the previous year reveal that:

- The percentage of ELL students achieving the acceptable standard and the standard of excellence decreased; however, significantly more students wrote the 30-1 exam from the previous year
- The percentage of FNMI students achieving the acceptable standard and the standard of excellence decreased. However, in both instances the decrease is due to one less student achieving at the standard.
- The percentage of students in need of specialized supports and services achieving the acceptable standard decreased and the percentage achieving the standard of excellence increased. In both instances, significantly more students wrote the exam from the previous year.

Overall, the percentage of District students meeting the acceptable standard and the standard of excellence in Mathematics 30-2 has increased significantly over the past five years. Furthermore, the results are higher than the province. The percentage of District students meeting the acceptable standard in Mathematics 30-2 increased this year from 76.0 per cent to 79.1 per cent as compared to an increase from 73.9 percent to 75.4 per cent for the province. The percentage of District students meeting the standard of excellence in Mathematics 30-2 increased this year from 18.3 per cent to 21.2 per cent as compared to an increase from 15.5 per cent to 16.8 per cent for the province. It is important to note that, in examining the Diploma exam data for mathematics, 117 more students wrote the 30-2 exam as compared to 68 less students writing the 30-1 exam. The increase could be due to the fact that the entrance requirements for university are not limited to 30-1 Mathematics, as many programs accept 30-2 as a requirement. Teachers are counselling students to engage in the math course level best suited to the requirements reflecting their future goals.

When the Mathematics 30-2 data is disaggregated to reflect achievement of ELLs, FNMI students and students in need of specialized supports and services, the trend data indicates that:

- The percentage of ELL students achieving the acceptable standard and the standard of excellence increased from 2013 yet decreased from the previous year. Despite the decrease from the previous year, more ELL students achieved the standard.
- The percentage of FMNI students achieving the acceptable standard and the standard of excellence increased significantly in both the five year trend data and from the previous year.
- The percentage of students in need of specialized supports and services achieving the acceptable standard increased significantly in both the five year trend data and from the previous year, however, the percentage achieving the standard of excellence decreased.

### Math Intervention Programming Initiative (MIPI)

In 2016, the results of the MIPI indicate that the overall number of students requiring intervention has remained steady over three years. While the data from year to year shows the number of students requiring interventions is consistent, there are some important considerations to bear in mind. Each year of the MIPI administration, the items on the instrument have been revised; therefore, the comparison of the results from year to year is less reliable. The data collected for 2014 and 2015 represents the number of students achieving below 60 per cent on the instrument combined with the teacher professional judgment to determine the number of students requiring intervention. The data collected for 2016 strictly represents the number of students achieving below 60 per cent on the instrument. The items of the instrument and the methods of data collection continue to be revised and edited on an annual basis as part of the generative process; therefore the comparability of the data collected from year to year may vary depending on the specific changes to the instrument.

The District recognizes that teacher professional judgment is key in determining the grade level of programming for their students in mathematics. While internal District data, such as MIPI, is inconsistent with the PAT data, the purposes of the District data collection are to inform programming and determine which students might require additional supports each year. It is through the provision of targeted support to those who need it most that overall mathematics results on Accountability Measures continue to improve. Overall, the District continues to work on improving results in mathematics and numeracy by continuing to use data to inform programming in order to create excellent opportunities for success in mathematics for all students.

### **SECTION THREE: 2015-2016 SUPPORTS TARGETED TO INCREASE STUDENT ACHIEVEMENT IN NUMERACY**

Much work was completed in 2015-2016 to improve mathematics and numeracy skills in students across the District. A four year District-wide plan was developed to ensure targeted, quality supports would be identified, developed and made available collaboratively by schools and central departments. This *Numeracy Guiding Document and Action Plan 2015-2019* was completed by the Numeracy Principal Advisory Committee and introduced in the fall of 2015, and identified the targeted outcomes, strategies and a four year plan of activities for improving student achievement in numeracy and mathematics. The initiatives described below are activities that were identified and implemented from this action plan.

#### **Math Intervention Programming Initiative (MIPI) Implementation**

In 2014-2015, the District implemented the MIPI for Grades 2–9 to provide teachers with information to develop individualized math intervention plans. In 2015-2016, the MIPI was administered to students in Grades 2–10. Analysis of the MIPI has led to continued review and revision of the tool.

#### **Expanded Opportunities for Numeracy and Mathematics Professional Learning Support**

Building staff expertise and capacity in research-based, high impact numeracy and mathematics strategies for individual, small group and whole class instruction was a focus for the 2015-2016 school year. Through access to central surplus funds, three additional numeracy consultants were made available to schools. This ensured each of the four leadership groups had a consultant assigned to provide support and consultant expertise related to Grades 7–12 numeracy programming. This addition significantly increased opportunities for professional learning in numeracy and mathematics for teachers, educational assistants, parents and school leaders. Professional learning offerings were expanded, sessions were provided for parents, and several District-wide professional learning events were provided, including: two Principal and Lead Teacher Professional Learning Days, which were attended by 653 staff; two Numeracy Across the Curriculum Best Practices Professional Learning Days,

which were attended by 486 staff; and numeracy and mathematics summer institutes, that were attended by 42 teachers.

A total of 3,077 teachers, principals and educational assistants received in-service sessions and coaching or consultation sessions to support their numeracy and mathematics professional learning. These sessions were provided through schools, catchment groups, leadership groups or through central sessions. The two professional learning series, “Foundations of Mathematics” and “Numeracy Foundations”, provided key foundational understanding and skills to teachers of mathematics and teachers of other content areas. Sessions such as “A Guided Approach to Math”, “Mathematical Processes”, and “Supporting Students at Various Levels in Mathematics” were also foundational to improving teacher practice in mathematics.

Throughout 2015-2016, schools provided a range of mathematics interventions to students who required additional supports, including guided math practices. Trustees will be able to gather further information about informal numeracy and mathematics interventions through their attendance at catchment and school Results Reviews.

### **Additional Integration of Supports in Mathematics and Numeracy for FNMI and ELL Students**

Targeted work was completed in 2015-2016 to ensure that additional resources and professional learning content was provided to enable teachers to better support FNMI students and ELLs. For example, numeracy tasks were developed for the existing FNMI Edukits; new sample lesson plans for teachers were developed and provided; new professional learning sessions, such as “Reconciliation Through Numeracy”, were delivered. Through the District-wide Focus on Reading work, materials were developed that identified explicit strategies to support language and reading development in mathematics. Strategies to support English language learners were embedded into mathematics and numeracy professional learning sessions (such as the use of manipulatives, technology supports, visuals, and the provision of explicit vocabulary support).

### **Review and Development of Numeracy Resources**

In the 2015-2016, a number of numeracy and mathematics resources were reviewed and/or developed to support administrators as well as teachers and educational assistants in the classroom.

- District-developed and published resources, such as *Maximizing Math*, were reviewed by teachers and recommendations were made regarding further improvements to align with provincial requirements, including curriculum changes.
- Additional resources were developed. These included draft Handbooks for Supporting Students in Meeting the Reading Demands of Mathematics for Grades 1–6, Strategy Cards for junior high and high school teachers to support students in meeting the reading demands of mathematics, support materials for principals, etc.
- A numeracy literature review was commissioned from the University of Alberta, in response to key questions developed by the Numeracy Principal Advisory Committee.
- A numeracy website for District staff to effectively share information and resources was developed.
- A Google + community was created to promote District-wide sharing and collaboration and grew to include 311 members by the end of the school year.

### **Increased Collaboration with External Partners**

In 2015-2016, work with external organizations in support of student learning was expanded. The MIPI was shared with ten external school districts. Collaboration with the University of Alberta, Concordia University and the Edmonton Regional Learning Consortium took place. These initiatives enabled the District to expand learning opportunities for staff.

#### SECTION FOUR: PRIORITY STRATEGIES MOVING FORWARD

To advance the outcome that more students demonstrate growth and achieve learner outcomes with a specific focus on numeracy and mathematics, the District will pursue the following strategies:

- Use data from the Prior Level of Achievement Reports to identify sites that have demonstrated improvement in their mathematics results at the Grade 3, 6, and 9 levels. These reports serve as a predictor of students' level of achievement on current PATs based on their prior PAT results. Schools whose actual average is significantly above the predicted school average recently and consistently over the past five years have been identified as sites demonstrating improvement. These sites will be consulted to determine the strategies and approaches that have contributed to the increase in results and learnings will be shared across the District.
- Use data from the Accountability Pillar for Mathematics 30-1 and 30-2 to identify schools that have demonstrated an improvement that is greater than the provincial per cent difference and have consistently shown results that have exceeded provincial results. These sites can also be consulted to determine the strategies and approaches that have contributed to the increase in results and learnings will be shared across the District.
- Professional learning supports and resources will continue to be developed and provided to support classroom teachers in implementing research based best practices to support numeracy and mathematics teaching and learning. This includes:
  - Supports for schools in assessing and identifying students who require interventions and ensuring these students receive quality, targeted support.
  - Exploration and potential development of a formal mathematics intervention process, potentially based on components of the First Steps in Math resource.
  - Review and revision of the MIPI tool and processes for documenting both quantitative and qualitative data to inform professional learning.
  - Expanding professional development for Kindergarten to Grade 12 teachers with a focus on research-based approaches in the area of numeracy and mathematics. This includes expanding access to sessions and coaching. Key professional learning sessions include Foundations of Mathematics, Numeracy Foundations (for teachers of subjects other than mathematics), Guided Math, formal and informal mathematics interventions, and sessions to support the analysis of MIPI and provincial achievement test data to determine and implement needed supports for students in targeted areas.
  - Continuing to offer summer institutes to deepen teacher capacity in numeracy and mathematics on a variety of topics.
  - Continue to gather research and build effective processes for whole class, small group and one on one intervention practices.
  - Enhancing access to professional learning opportunities for junior high and high school teachers in the area numeracy and mathematics instruction and intervention.
  - Using central surplus funds, bring in external subject matter experts to support professional learning and to enhance District capacity in the area of numeracy and mathematics.
  - Expanding access to high-leverage resources, including Mathletics.

**DATE:** November 29, 2016

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Edmonton Public School's Combined Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016)

**ORIGINATOR:** Dr. Sandra Stoddard, Executive Director, Governance, Strategic Services and Supports to Schools

**RESOURCE STAFF:** Ria Ames , Angela Anderson , Janice Aubry , Lisa Austin , Laurie Barnstable , Marnie Beaudin , Joanne Bergos , Sonia Boctor , Todd Burnstad , Sherelyn Caderma , Pina Chiarello , Vanessa Croswell-Klettke , Sanaa El-Hassany , Laurie Elkow , Chelsea Erdmann , Leanne Fedor , Terri Gosine , Marlene Hanson , Geoff Holmes , Kim Holowatuk , Regan Holt , Marlene Hornung , Dave Jones , Willa Kung-Sutton , Roland Labbe , Cathy MacDonald , Darwin Martin , Greg McNulty , Janet McNally , Leona Morrison , Garry Padlewski , Nancy Petersen , Tracy Poulin , Madonna Proulx , Natalie Prytuluk , Melissa Purcell , Anita Rice , Adam Snider , Rick Stiles-Oldring , Jennifer Thompson , Renee Thomson , Christopher Wright , Bonnie Zack

**REFERENCE:** [Policy and Requirements for School Board Planning and Results Reporting \(April 2016\)](#), Policy and Requirements for School Board Planning and Results Reporting: Assurance Model Pilot (May 2016)

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## ISSUE

Each year Alberta Education requires school jurisdictions to submit a Three-Year Education Plan (3YEP) and Annual Education Results Report (AERR) by November 30.

## BACKGROUND

School jurisdictions are legislatively required to report on results from the previous school year and prepare education plans for the next three years (*School Act*, RSA 2000, Section 78; *Fiscal Planning and Transparency Act*, Section 10; Alberta Regulation 113/2007, *School Act*, *School Councils Regulation*; Alberta Regulation 120/2008, *Government Organization Act*, *Education Grants Regulation*, Sections 2 and 7). Alberta Education provides policy and requirements for the 3YEP/AERR in [Policy Requirements for School Board Planning and Results Reporting](#).

In 2015, the District joined Alberta Education's Assurance Pilot Project, which focuses on three areas: system priorities, accountability, and strategic engagement. The Assurance Model provides a framework for the District to be flexible in its planning and reporting which enables alignment to provincial educational priorities while being responsive to the District's local priorities. As part of the pilot project, the District reports on the Board of Trustees' Vision, Mission, Values, District Priorities and Strategic Plan. The Combined 3YEP and AERR serves as one of the planning and accountability tools the District uses to share information with stakeholders.

With the flexibility provided through the Assurance Pilot, in response to the Board of Trustees' direction, the District established a new Assurance and Public Board Reporting Cycle to support completion of the AERR/3YEP. For the 2016-2017 school year, at public Board meetings, Administration presents high level

overview and detailed analysis reports for the Strategic Plan's goals and outcomes. The Strategic Plan Update reports allow the Board of Trustees and Administration to engage in meaningful dialogue about results and strategies moving forward. This year's AERR/3YEP provides a summary of results for the 2015-2016 school year and plans moving forward, as well as links to these Strategic Plan Update reports which include detailed, disaggregated information.

Also, part of the District's strategic approach to planning and reporting and building a culture of evidence-based decision-making are the following complementary strategies:

1. the introduction of a Dashboard, a web-based tool with easy access to key performance indicators centralized in one location to monitor goals and outcomes related to the Strategic Plan at school, catchment, and District levels
2. catchment reporting that aligns to the key performance indicators identified in the Strategic Plan
3. school and central Results Review processes.

## RELATED FACTS

The Strategic Plan is the foundation for planning and reporting throughout the District. The key performance indicators reflected in the document are intended to be consistent, where possible, through the multiple levels of planning and reporting.

## RECOMMENDATION

**That the Edmonton Public Schools' Combined Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016) be approved.**

## OPTIONS

Based on the information provided in this report, the following options are considered most appropriate:

1. Approve the Combined Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016) with no changes.
2. Revise the Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016) and make changes for final submission to Alberta Education on November 30, 2016.

## CONSIDERATIONS and ANALYSIS

- The Combined Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016) satisfies Alberta Education's requirements for Board Planning and Reporting, and integrates the District's new approach established through the Assurance and Public Board Reporting Cycle.
- Alberta Education's deadline for submission is November 30, 2016.

## NEXT STEPS

- Following the November 29, 2016, Board meeting, the Financial Results and Budget Summary will be incorporated into the report and any changes requested by the Board of Trustees will be made in the report.
- The Combined 3YEP/AERR and two-page AERR Summary will be posted on the District website by November 30, 2016.
- The final Combined 3YEP/AERR and two-page AERR will be submitted to Alberta Education by November 30, 2016.
- As Strategic Plan Update reports are released, links to the reports will be placed on the District's posting of the 3YEP/AERR.

## ATTACHMENTS and APPENDICES

ATTACHMENT I Combined Three-Year Education Plan (2016-2019) and Annual Education Results Report (2015-2016)

SB:SEC:sec



EDMONTON PUBLIC SCHOOLS

# THREE-YEAR EDUCATION PLAN (3YEP) 2016-2019

## ANNUAL EDUCATION RESULTS REPORT (AERR) 2015-2016 School Year

3020 Edmonton Public School District No.7  
Submitted to Alberta Education  
November 30, 2016

### DRAFT

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## Message from the Board Chair and Superintendent of Schools

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The 2015–2016 school year was another successful and challenging one for our District, but—guided by our District Strategic Plan (Strategic Plan)—all our schools and central departments pulled together to do some amazing things. We welcomed new students who arrived with their families from Syria. We opened our doors to students and families from Fort McMurray when a wildfire forced them to evacuate their homes. And we worked together as a team with families and community to help more students be successful and cross the finish line.

We're proud of our students' academic achievement results and staff and parents' efforts to help students achieve these results. Our five-year high school completion rate continues to improve—it's up 2.1 per cent over the last five years. Although it's encouraging to see more First Nations, Métis and Inuit students completing high school, we still have a lot to do in this area to close the achievement gap for these students. Other trends show our overall student dropout rate has gone down over the past five years. This is great news. We want to ensure *every* student completes high school and we'll continue to work diligently toward achieving this goal. Educating children is a collective responsibility, so we count on students, families, and community partnering with us in this work.

Life for students beyond K-12 education is one of the priorities in our Strategic Plan because we recognize a student's journey doesn't stop after they finish high school. We want our kids to be successful before, during *and after* their school journey. Their success begins with early interventions during preschool and continues by helping students achieve success beyond school through Career Pathways, which helps students identify their interests, skills and talents early.

Alignment of effort is key to helping students be successful during their school career with us. That's why collaboration between each of the schools they attend is key. Organizing schools into catchments—schools grouped together based on common high school feeder patterns—has contributed to the District's culture of shared responsibility for students from K-12. By collaborating within and across catchments, school leaders are able to share knowledge and successes, and use evidence-based approaches to leverage resources focused on supporting student success.

Our Strategic Plan also prioritizes communication, engagement and partnerships with parents and community organizations. Our focus on, and belief in, engagement can be seen in the steps we've taken to effectively manage space for students by continuing conversations about the long-term infrastructure needs in mature communities. We also asked the community for feedback on attendance area options for the 11 new public schools scheduled to open in September 2017, and began discussions about the need for future high school space. And, of course, we were thrilled to open three new schools to serve growing communities on the city's south side.

In keeping with our Cornerstone Value of accountability, we're holding ourselves accountable to our partners in the community by reporting about our Strategic Plan progress on a regular, ongoing basis rather than just once a year. In addition to the Annual Education Results Report, our staff now provide the Board of Trustees with Strategic Plan Updates at nearly every public Board meeting. We've also begun publishing at-a-glance summaries of these updates on SchoolZone and the District website, so parents have an opportunity to see how our Strategic Plan relates to their child's education.

More “real time” reporting also helps us make better use of data. As a District, we believe strongly in the value of evidence-based decision-making and in fostering a culture of continuous improvement. We use a variety of tools to ensure our school leaders can access data such as student achievement results and provincial accountability measures to help create school improvement plans and determine what kinds of supports are needed for their increasingly complex classrooms.

As we come into the final year of the current Board of Trustees’ term in office, we're building on our successes of the past three years to better serve students and their families. There's a lot more to do as we strive to ensure every child in our care is as successful as they can possibly be. We're confident that the work we’ve done over the past three years has set us on the path to continued success in transforming the learners of today into the leaders of tomorrow.



**Michael Janz**  
Board Chair



**Darrel Robertson**  
Superintendent of Schools



# Introduction

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Edmonton Public Schools' Three-Year Education Plan (2016–2017 to 2018–2019) and Annual Education Results Report (2015–2016) presents the District's accomplishments and results for the 2015–2016 school year as well as the District's strategies to advance its strategic priorities over the next three years. For the second year, the District is part of Alberta Education's Assurance Model Pilot Project and is focusing on three areas in the model: system priorities, accountability, and strategic engagement.

As part of the pilot project, the District is reporting on the Board of Trustees' (the Board's) Vision, Mission, Values, District Priorities and 2014–2018 Strategic Plan, which reflect provincial educational priorities while at the same time being responsive to local priorities. Reporting on the Strategic Plan strengthens awareness and understanding throughout the organization about what the District's priorities and goals are and how initiatives and actions support achievement of the Plan.

The District believes in accountability, where staff are all working together to serve students and help them be successful. The District introduced a dashboard, a web-based tool with easy access to key performance indicators centralized in one location, to monitor goals and outcomes related to the Strategic Plan at school, catchment and District levels. As well, the District is introducing Strategic Plan Updates at public Board meetings to enable a conversation between District staff and the Board on the District's progress in advancing its Strategic Plan and to inform future direction. The ongoing dialogue is intended to build on the District's growing culture of timely evidence-based decision-making.

The District believes in the importance of stakeholder engagement in informing strategic direction. When the District's foundational statements were developed in 2014, the District consulted extensively with parents, students, community and staff. Also, during the 2015–2016 school year, the District administered the District Feedback Survey to stakeholders as a way of measuring progress on the Strategic Plan and to guide future priorities. The District Feedback Survey will continue to be administered to gather stakeholder feedback, with the next survey scheduled for release in spring 2017.

Survey data is used at a District level, and also serves as a source of information for school principals to engage in conversations with parents and the school community to inform planning decisions and reporting. In addition, each fall, District schools share their results, highlight trends and identify strategies for the coming year through a public Results Review process. This process engages staff and parents to review school results and provide input into the school plans. School Councils play a critical role in engaging parents in this process.

The District's Annual Education Results Report (AERR) and Three-Year Education Plan (3YEP) is yet another way the District demonstrates accountability to the public.

## Timelines and Communication

After being approved by the Board, this document, along with a Summary of the 3YEP/AERR, will be provided to Alberta Education.

The 3YEP/AERR Report and AERR Summary are posted on the District website at [epsb.ca/ourdistrict/results/aerr](https://epsb.ca/ourdistrict/results/aerr). The average Class Size Reports by school for all subjects and core subjects are posted on the District website at [epsb.ca/schools/goingtoschool/academics/classsizes](https://epsb.ca/schools/goingtoschool/academics/classsizes).

## Accountability Statement

Edmonton Public School's AERR for the 2015–2016 school year and its Education Plan for the three years beginning September 1, 2016, were prepared under the direction of the Board in accordance with its responsibilities under the *School Act* and the *Fiscal Planning and Transparency Act*. This document was developed in the context of the provincial government's business and fiscal plans.

To the best of its abilities, the Board has used the results reported in the document to develop the Education Plan and is committed to implementing the strategies contained within the Education Plan to improve student learning and results.

The Board approved this combined AERR for the 2015–2016 school year and the 3YEP for 2016–2019 on November XX, 2016.



# Who We Are

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## Board of Trustees

The Edmonton Public School Board is responsible for the education of more than 95,600 students. Nine elected Trustees ensure students receive the best education possible in Edmonton's 205 public schools. Learn more about the Board of Trustees at: [epsb.ca/ourdistrict/board](https://epsb.ca/ourdistrict/board).



**Left to right:** Ken Gibson (*Ward E*), Nathan Ip (*Ward H*), Michelle Draper (*Ward B*), Michael Janz (*Ward F*), Sherry Adams (*Ward I*), Ray Martin (*Ward D*), Cheryl Johner (*Ward A*), Orville Chubb (*Ward C*) and Bridget Stirling (*Ward G*)

## District Support Team

The District Support Team is led by the Superintendent, who provides advice and support to the Board, ensures the District fulfills the goals and outcomes established in the Strategic Plan, and that the District meets expectations set out in Board policy.

Ultimately, the Superintendent's mandate is the success of every student. This work is a collective responsibility shared among the District Support Team, principals, teachers, support and exempt staff, maintenance workers, custodians, as well as parents and community members who, together, strive to improve student achievement results.

The District Support Team provides leadership and support in this work, and comprises:

- Darrel Robertson, Superintendent of Schools
- Ron MacNeil, Assistant Superintendent of Schools
- Kathy Muhlethaler, Assistant Superintendent of Schools
- Kent Pharis, Assistant Superintendent of Schools
- Mike Suderman, Assistant Superintendent of Schools
- Dr. Lorne Parker, Executive Director, Infrastructure
- Dr. Sandra Stoddard, Executive Director, Governance, Strategic Services and Support for Schools
- Angela Anderson, Managing Director, Human Resources
- Lisa Austin, Managing Director, Communications and District Foundation
- Todd Burnstad, Chief Financial Officer, Financial Services
- Leona Morrison, Managing Director, Inclusive Learning
- Grace Cook, General Counsel

## District Overview

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**126** Elementary

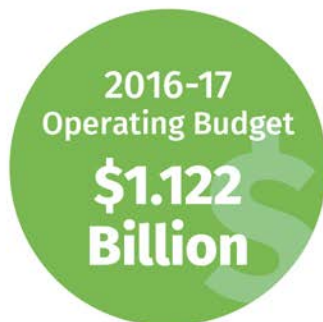
**30** Elementary/Junior High

**5** Elementary/Junior/Senior High

**27** Junior High

**3** Junior/Senior High

**14** Senior High



**Student Enrolment**  
(September 30, 2016)

**95,642**



**Total Staff**  
(September 30, 2016)

**8,238.90**  
Full-Time Equivalent

Learn more about:

Schools: [epsb.ca/schools/findaschool/list](https://epsb.ca/schools/findaschool/list)

Programs we offer: [epsb.ca/programs](https://epsb.ca/programs)

Departments and services: [epsb.ca/ourdistrict/departments](https://epsb.ca/ourdistrict/departments)

# How We Do Our Work

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Edmonton Public Schools is a values-driven organization. This means everything we do is governed by our Cornerstone Values: **accountability, collaboration, equity and integrity.**

These values guide us every day, helping us make decisions that keep students as the focus of our work. Whether we are teachers, support or exempt staff, consultants or administrators, maintenance or custodial staff, we all work to achieve the District's Vision of "transforming the learners of today into the leaders of tomorrow."

## Accountability

We believe in accountability—a commitment to transparency and holding fast to one's values. For the District, this means communicating our results, challenges, successes and decisions openly. It means keeping our promises and meeting our commitments. Through accountability, staff work together to serve students and help them be successful.

A key component to accountability is a culture of evidence-based decision-making where the District examines evidence and puts in place research-based best practices to improve student success. This culture is supported by opportunities for staff to enhance their knowledge and use of data; and integrating conversations about data in the District's Results Review, which highlights achievements, plans, and financial information of schools and central departments.

## Collaboration

We believe in working together to achieve outcomes. As a District, we examine our challenges together, which helps build a culture of shared leadership, and find ways to operate under a framework of shared leadership.

The District offers many ways for staff to collaborate. Through catchments, for example, groups of schools work together for a common purpose. As well, the District consults with staff through various forums, and believes in co-creating District initiatives with input from its

stakeholders. In 2015–2016, the District created the Teacher Collaboration Committee (TCC) to ensure teachers' voices were heard on a variety of educational issues. The TCC complements the Superintendent's Community of Practice in Education (SCOPE), which provides feedback to support District-wide decision-making.

The District also continues to engage key stakeholders on several key initiatives. In 2015–2016, the Board approved the creation of a Student Senate, based on recommendations from high school students. The Student Senate, comprised of District high school students, will connect with other students, staff, and the Board to discuss ideas and concerns about education, share their diverse perspectives, and problem solve together. The Student Senate will be operational in the 2016–2017 school year.

The District also works in partnership with educational stakeholders including parents and guardians, community organizations, businesses, service providers, not-for-profit organizations, Alberta Education, and post-secondary institutions. With collaboration as one of our Cornerstone Values, the role of principal has evolved to be both an instructional and community leader. Furthermore, our Board works with School Councils on a regular basis. Our District is committed to working with partners to help every student succeed.

Furthermore, in a city with a growing student population, the District continues to connect with community on planning issues, including new schools for new communities, as well as modernizations in mature communities, and exploring potential to gain community consensus for *Space for Students in Mature Communities* school facility renewal initiatives.

## Equity

We believe in equity—fairness and justice in the way people are treated. For the District, equity means that every student has the right to excellent teaching in a quality learning environment. This value includes providing positive, welcoming school communities where students feel safe, included, and ready to learn. We fundamentally believe that all of our students are capable of success. Through the Equity Fund—a fund approved by the Board in 2014–2015 to enhance opportunities for all schools in the District and to support the District’s Cornerstone Values—additional resources are distributed through leadership groups for areas of greatest need to make a difference for students. Priority is given to projects impacting literacy, numeracy, and mental health.

## Integrity

We believe in the importance of integrity—firm adherence to a code of moral or professional values. For the District, this means doing what we say, choosing collaboration over competition and being honest, compassionate, and professional in all our interactions. In addition to giving our all, it means sharing our successes, our resources, our knowledge, and our learning.

## Our approach to decision-making

Additionally, Edmonton Public Schools is known for ground-breaking approaches to education, including site-based budgeting, a concept that was first introduced in 1976, as a pilot project in seven schools. By 1980, this approach had expanded to include all of our schools. Since then, the concept has evolved to site-based decision-making, which brings the responsibility for decisions and resource allocation to the school level and empowers staff to be creative and innovative to improve the success of students while allowing for congruence to address complexities through shared resources and collaboration. Today, site-based decision-making continues to function successfully in our District.

Another key factor to the success of our students is leadership, which is demonstrated throughout the District. As a District, we believe in servant leadership and understand the importance of creating the conditions that build leadership capacity. Our Cornerstone Values are the foundation upon which our leadership is built.

Fostering positive learning and working environments helps to create welcoming school communities where students feel safe and ready to learn.

# Foundational Statements



## VISION

Transforming the learners of today  
into the leaders of tomorrow

## MISSION

We inspire student success through high quality  
learning opportunities, supported by meaningfully  
engaged students, parents, staff and community.

## VALUES

Supporting the Vision, Mission and Priorities are  
the District's cornerstone values of accountability,  
collaboration, equity and integrity.

## DISTRICT PRIORITIES

2014-2018

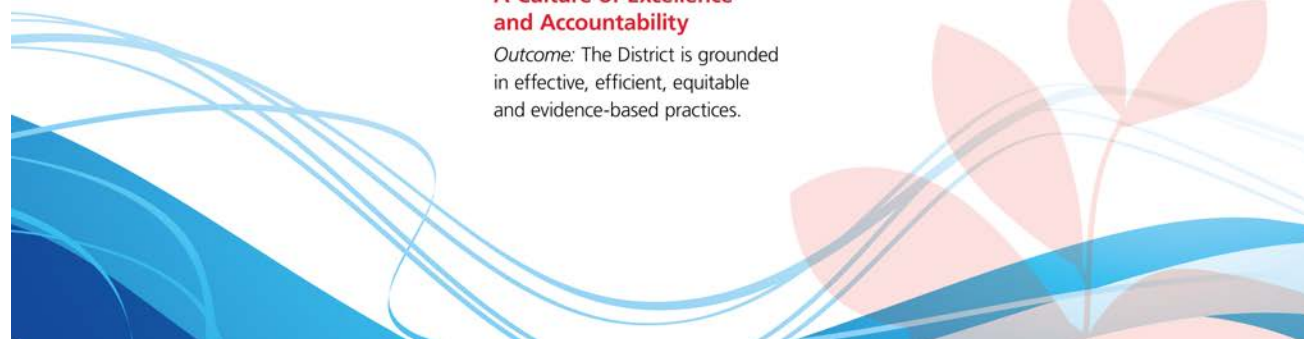
1. Foster growth and success for every student  
by supporting their journey from early learning  
through high school completion and beyond.
2. Provide welcoming, high quality learning  
and working environments.
3. Enhance public education through  
communication, engagement  
and partnerships.



## Our Strategic Goals

The District has identified strategic goals for each of the three priorities that respond to students' needs and community expectations, while also laying a strong foundation for ongoing educational and organizational success.

Priority 1	Priority 2	Priority 3
<p><b>Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.</b></p> <p><b>Goal One</b>  <b>An Excellent Start to Learning</b>  <i>Outcome:</i> More children enter Grade One reaching emotional, social, intellectual and physical developmental milestones.</p> <p><b>Goal Two</b>  <b>Success for Every Student</b>  <i>Outcome:</i> More students demonstrate growth and achieve student learning outcomes with a specific focus on literacy and numeracy.</p> <p><b>Goal Three</b>  <b>Success Beyond Schooling</b>  <i>Outcome:</i> More students complete high school and are connected to career pathways that support their transition to post-secondary studies or the world of work.</p>	<p><b>Provide welcoming, high quality learning and working environments.</b></p> <p><b>Goal One</b>  <b>A Focus on Well-being and Student Citizenship</b>  <i>Outcome:</i> Our learning and working environments are welcoming, inclusive, safe and healthy.</p> <p><b>Goal Two</b>  <b>Quality Infrastructure for All</b>  <i>Outcome:</i> Students and staff benefit from high quality learning and working environments that facilitate quality program delivery through effective planning, managing and investing in district infrastructure.</p> <p><b>Goal Three</b>  <b>Building Capacity through a Culture of Collaboration and Distributed Leadership</b>  <i>Outcome:</i> Throughout their careers, all staff are provided opportunities to enhance their professional capacity and leadership within a culture of collaboration.</p> <p><b>Goal Four</b>  <b>A Culture of Excellence and Accountability</b>  <i>Outcome:</i> The District is grounded in effective, efficient, equitable and evidence-based practices.</p>	<p><b>Enhance public education through communication, engagement and partnerships.</b></p> <p><b>Goal One</b>  <b>Parents as Partners</b>  <i>Outcome:</i> Parents are provided opportunities to be involved in their child's education.</p> <p><b>Goal Two</b>  <b>Supports for the Whole Child</b>  <i>Outcome:</i> Community partnerships are established to provide supports and services to foster growth and success of students and families.</p> <p><b>Goal Three</b>  <b>Engaged and Effective Governance</b>  <i>Outcome:</i> The District is committed to ongoing communication, participation and engagement that enhances public education.</p>



## Trends and Issues

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We are proud to be an integral part of Edmonton's growth as a strong, diverse and dynamic community. In maintaining our focus on our Vision and Strategic Plan, it is important that we continue to scan the local, provincial, national and international environments so we can track external and internal trends and issues that could impact our work.

### **A Culture of Excellence and Accountability**

The District continues to emphasize a culture of excellence and accountability, with a belief that all students can thrive in their learning. To foster the conditions foundational to student success, the District focuses on evidence-based decision-making by using data and research-based best practices. This evidence-based culture is currently supported through three key strategies: introducing a web-based data dashboard with key educational performance indicators that can be monitored at multiple levels of the organization; the incorporation of catchment planning to the annual Results Review, which highlights achievements, plans, and financial information; and increasing dialogue between the Board and District administration through the presentation of Strategic Plan update reports highlighting progress towards achieving Strategic Plan goals.

The Equity Fund continues to provide instructional leaders with the opportunity to look at their data and leverage additional funds in support of student success. Additionally, the District recognizes the importance of the role of partners and works closely with key community stakeholders who are committed to the shared outcome of student success. Through a culture of excellence and accountability, the District strives to find ways to build on its many successes and remain responsive to demands that may emerge.

### **External Trends, Issues, and Opportunities**

Education does not exist in isolation from social, political and economic realities. With this in mind, there are external trends and issues with the potential to impact the education sector, programs, and students. The District must adapt to emerging issues and needs.

#### **Welcoming Students— Global and Provincial Trends**

In 2015–2016, Edmonton, along with other cities across the country, welcomed many families new to Canada, several of whom had refugee status, including 517 students from Syria. At the end of June 2016, the District served 1,567 students with formal refugee status. We anticipate seeing a significant number of refugee families coming to our city in the years ahead. As well, in spring 2016, Alberta experienced one of its most serious environmental crises with the wildfire and subsequent evacuation of residents from Fort McMurray and the Wood Buffalo region. To support the families fleeing the Fort McMurray area, the District welcomed 1,129 students into our schools.

#### **Alberta Education— New Curriculum Development**

Earlier this year, Alberta Education began work on new curriculum development to ensure provincial curriculum is relevant, meaningful, and engaging for all students. In addition to participating on subject-area consultations through the review and development process, the District will continue to prepare teachers and schools for the introduction and roll-out of the new curriculum.

## Economy

The economy can impact the education sector in many ways. For example, changes in provincial revenues can affect the amount of funding directed by the Province to the education sector. Furthermore, the economy has a direct impact on job market; fluctuation in employment has the potential to influence whether families move in or out of the city. This mobility is reflected in student transience and overall District enrolment patterns. While economic activity in Alberta and Canada has led to employment challenges overall, many families continue to move into Edmonton, where economies of scale offer better employment prospects, especially given the stability of employment in the MASH Sector (Municipalities, School Boards, Publicly-Funded Academic, Health and Social Service Entities).

A strong economy with available jobs can also result in students pursuing employment rather than transitioning to higher levels of education. On the other hand, if fewer jobs are available, students may choose to remain on an educational path. Either way, the District is helping students prepare for both the workforce and post-secondary education through our Career Pathways model and alternative learning programs.

## District Trends, Issues, and Opportunities

The District strives to be responsive and flexible to trends, issues, and opportunities facing the education sector, the District, and schools.

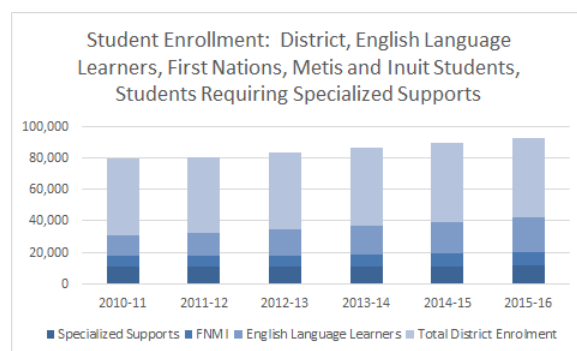
### Preparing Children to Learn

Research demonstrates children are forming skills in the early years to support their growth and lifelong learning. It is important children receive the necessary supports and interventions as early as possible to prepare them to learn. In the 2015–2016 school year, 8,519 children were enrolled in an Early Childhood Services program (kindergarten, early learning, early education), an increase of over 20 per cent from 6,935 children in 2011–2012. As measured by the Early Years Evaluation—Teacher Assessment (EYE-TA), at the beginning of the 2015-2016 school year, 61 per cent of students met the developmental

milestones considered foundational for success in Grade 1. At the end of the school year, the percentage of children demonstrating readiness for Grade 1 increased 20 per cent to 81 per cent. The District's focus on early education is aligned with current research stressing the importance of providing interventions to children early in preparation for their start to schooling.

### Complexity in the Classroom

The District serves a growing student population with rich diversity. The chart shows District enrolment profile over the past six years. Today, classrooms welcome a growing number of English Language Learners and students new to Canada, children in need of specialized supports and services, gifted and talented students, and students self-identifying as First Nations, Métis and Inuit students. To help meet the needs of the District's diverse student population, we deliver programming in one of three approaches: regular, special education and alternative. In the area of alternative programming, the District currently offers more than 30 program options that deliver the Alberta curriculum through a focus on academics, arts, athletics, language and culture, faith-based or teaching philosophy. Assistant Superintendents work closely with schools to address student opportunities and challenges.



### **Teacher Feedback**

The District's ability to support the success of every student is through the strengths, skills, and abilities of our teachers and staff. The District believes in the importance of collaborating with, and hearing from, teachers who work directly with our students.

In the midst of the opportunities and challenges, the District strives to find ways to support teachers and build on their strengths. Providing opportunities for staff to continue to learn and grow in their area of responsibility and expertise is one way. The District surveyed teachers to gain a better understanding of what professional learning topics they were interested in. The results from this survey have informed the development and delivery of District offered professional learning.

Early in 2016, the District invited teachers to identify the most pressing interests and challenges facing them today. To tap into the knowledge and experience of teachers, the District created a Teacher Collaboration Committee (TCC) where several teachers discussed the emerging priority topics, shared classroom stories, experiences, and potential solutions. Last year's TCC discussed classroom complexity, mental health and English language learners. The District will continue to use TCC as a means to hear teacher voice and gather their suggestions on various topics.



### **Partnerships**

The District believes in investing in relationships through trust and mutual understanding, and by engaging stakeholders in a common purpose—the success of students. We recognize the importance of partnering with those external stakeholders who have the expertise, knowledge and skills that complement and enhance ours. The entire community has an important role to play in preparing today's children and youth for their lives beyond high school. Forming partnerships with parents, stakeholders, and the community is an essential key strategy to meeting student needs and opportunities.

#### **Parents as Partners**

Student success at school begins at home. Expectations, behaviours, and attitudes children learn and experience at home, and the encouragement and support of parents are keys to success. Parents play an integral role in their child's educational journey. The District will continue to strive and find ways to work together effectively with parents as partners in their child's learning.

#### **Preparing Students for Success Beyond High School**

Our students' journey reaches beyond the doors of the K-12 system; in today's complex world, there are many opportunities and paths students can pursue. The District believes in preparing students for a life of dignity and fulfillment after high school—whether for post-secondary education, the world of work or life in the community. Preparation includes providing opportunities for students to develop knowledge and skills, learn about themselves and their interests and opportunities, and help them become confident, well-rounded citizens, whether through Career Pathways or offering alternative ways for students to complete high school, such as online learning through Argyll Centre, Centre High or various options through Metro Continuing Education.

## Infrastructure

The District is committed to students and staff having high quality learning and working environments. Through effective planning, managing, and investing in District infrastructure, the District strives to create appropriate and equitable access to 21<sup>st</sup> century learning spaces and technologies that meet the needs of all students. In an expanding city with a growing population, our schools face challenges through increased class sizes, unconventional spaces for classrooms, changing attendance areas, and challenging transportation logistics and bus ride times. The District enrolment as of September 30, 2016, was 95,642 students. This represents a growth of 19 per cent since 2011. In just one year (from 2015 to 2016) the growth was 3.6 per cent.

Funded by the Government of Alberta, the District opened three new schools in September 2016, and will open 11 more schools in fall 2017. Balanced with new schools in the city's outer rim in growing newer neighbourhoods, mature neighbourhoods have aging school buildings and declining enrolment in some schools. The District is working with communities across Edmonton to gain an understanding of their needs and hopes for schools in their neighbourhoods.



# 2016 Accountability Pillar Overall Summary

## Combined Accountability Pillar Overall Summary

Measure Category	Measure Category Evaluation	Measure	Edmonton School District No. 7			Alberta			Measure Evaluation		
			Current Result	Prev Year Result	Prev 3 Year Average	Current Result	Prev Year Result	Prev 3 Year Average	Achievement	Improvement	Overall
Safe and Caring Schools	Excellent	Safe and Caring	89.5	90.0	89.3	89.5	89.2	89.1	Very High	Maintained	Excellent
Student Learning Opportunities	Excellent	Program of Studies	83.0	83.0	82.8	81.9	81.3	81.4	Very High	Maintained	Excellent
		Education Quality	90.8	91.0	90.7	90.1	89.5	89.5	Very High	Maintained	Excellent
		Drop Out Rate	3.0	3.0	3.3	3.2	3.5	3.5	High	Improved Significantly	Good
		High School Completion Rate (3 yr)	72.3	72.6	71.2	76.5	76.5	75.5	Intermediate	Improved	Good
Student Learning Achievement (Grades K-9)	Good	PAT: Acceptable	77.4	76.4	76.7	73.6	72.9	73.4	Intermediate	Improved	Good
		PAT: Excellence	25.1	23.8	23.7	19.4	18.8	18.6	High	Improved Significantly	Good
Student Learning Achievement (Grades 10-12)	n/a	Diploma: Acceptable	83.6	82.5	82.6	85.0	85.2	85.1	Intermediate	Improved Significantly	Good
		Diploma: Excellence	23.4	22.4	22.1	21.0	21.0	20.5	High	Improved Significantly	Good
		Diploma Exam Participation Rate (4+ Exams)	60.1	59.2	59.8	54.6	54.4	53.5	High	Maintained	Good
		Rutherford Scholarship Eligibility Rate	59.3	n/a	n/a	60.8	n/a	n/a	n/a	n/a	n/a
Preparation for Lifelong Learning, World of Work, Citizenship	Good	Transition Rate (6 yr)	61.1	61.4	61.4	59.4	59.7	59.3	High	Maintained	Good
		Work Preparation	84.0	83.4	82.6	82.6	82.0	81.1	High	Improved Significantly	Good
		Citizenship	84.9	85.3	84.5	83.9	83.5	83.4	Very High	Improved	Excellent
Parental Involvement	Good	Parental Involvement	78.9	79.5	79.0	80.9	80.7	80.5	High	Maintained	Good
Continuous Improvement	Excellent	School Improvement	80.9	80.1	79.6	81.2	79.6	80.0	Very High	Improved Significantly	Excellent

### Notes:

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

## Combined Accountability Pillar FNMI Summary

Measure Category	Measure Category Evaluation	Measure	Edmonton School District No. 7 (FNMI)				Alberta (FNMI)			Measure Evaluation			Targets for Issue or Concern		
			Current Result	Target 2016	Prev Year Result	Prev 3 Year Average	Current Result	Prev Year Result	Prev 3 Year Average	Achievement	Improvement	Overall	2017	2018	2019
Student Learning Opportunities	n/a	Drop Out Rate	8.5	n/a	6.3	7.6	6.1	7.0	7.2	Low	Declined	Issue	8.0	7.5	7.0
		High School Completion Rate (3 yr)	38.3	n/a	39.8	33.9	50.2	47.7	46.4	Very Low	Improved	Issue	38.8	39.3	39.8
Student Learning Achievement (Grades K-9)	Concern	PAT: Acceptable	55.0	52.5	52.0	53.4	52.4	52.1	52.8	Very Low	Maintained	Concern	55.4	55.8	56.2
		PAT: Excellence	7.4	n/a	8.7	7.2	6.3	6.5	6.2	Very Low	Maintained	Concern	8.1	8.6	9.1
Student Learning Achievement (Grades 10-12)	n/a	Diploma: Acceptable	79.7	76.0	75.7	75.3	78.2	78.3	77.3	Low	Improved	Acceptable	Not required		
		Diploma: Excellence	9.3	n/a	10.4	9.3	10.0	9.5	9.4	Low	Maintained	Issue	9.8	10.3	10.8
		Diploma Exam Participation Rate (4+ Exams)	20.3	n/a	20.2	18.7	20.7	21.0	20.4	Very Low	Maintained	Concern	20.8	21.3	21.8
		Rutherford Scholarship Eligibility Rate	32.7	31.5	n/a	n/a	31.9	n/a	n/a	n/a	n/a	n/a	Not required		
Preparation for Lifelong Learning, World of Work, Citizenship	n/a	Transition Rate (6 yr)	26.3	27.8	26.6	25.6	33.5	33.0	33.3	Very Low	Maintained	Concern	26.8	27.3	27.8

### Notes:

- Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
- Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
- Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
- Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
- Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

## How to Read the Report

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This section of the report is organized by District Priority down to Goals and Outcomes, and includes the following breakdown of reporting information.

- **Priority Summary Chart:** A one-page high level overview drawing attention to summary of results and signaling opportunities moving forward for each priority area of the Strategic Plan.
- Key Performance Indicator data profiled by goal
- 2015–2016 Results Summary by goal
- Areas Moving Forward 2016–2019 Priority Strategies by goal
- **Detailed Analysis** with links to [the Strategic Plan Update reports](#) as they become available.

The Key Performance Indicator charts include an evaluation column that demonstrates how the current results have been improved over the previous year's result. Alberta Education's Improvement assessment is used for key performance measures related to Accountability Pillar District overall results.

Improved Significantly
Improved
Maintained
Declined
Declined Significantly

The District also used the following improvement assessment when comparing most current results to previous year results for local measures, and disaggregated data (e.g., First Nation, Métis and Inuit student results).

+	Increase performance results from the previous year
-	Decreased performance results from the previous year
=	Maintained performance results from the previous year

Furthermore, baseline indicates the first year data has been collected for the Key Performance Indicators, and will be used to compare results for future years.



# PRIORITY 1

**Foster growth and success for every student  
by supporting their journey from early learning  
through high school completion and beyond.**

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Goal 1: An Excellent Start to Learning

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ 8,519 children enrolled in Early Childhood Services Program; this is an increase of 20 per cent over five years</li> <li>➤ By the end of the 2015–2016 school year, 81 per cent of Kindergarten students had developmental milestones considered foundational for school success</li> <li>➤ Results of the Early Years pilot project informed Early Childhood Services Program expansion</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Expand Language/Literacy Pilot</li> <li>⇒ Continue to implement Math Interactive Learning Experience (MILE) Research Study</li> <li>⇒ Continue Early Years Program Expansion</li> <li>⇒ Continue to develop and implement early years resources to build capacity of teachers, administrators, staff, and families</li> </ul>

## Goal 2: Success for Every Student

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ Grade 6 and 9 students continue to do well in the District's overall cohort Provincial Achievement Test results compared to the province</li> <li>➤ Grade 6 and Grade 9 English Language Arts have been consistently higher than the province over the past five years</li> <li>➤ Overall percentage of students who achieved the acceptable standard and the standard of excellence on diploma examinations improved over the past 5 years</li> <li>➤ The participation rate in the English Language Arts 30-1 stream continues to be higher than the province</li> <li>➤ Grade 6 Math saw a slight decrease in both acceptable standard and standard of excellence, though we remain above provincial average</li> <li>➤ Grade 9 Math saw a slight increase in both acceptable standard and standard of excellence as well as being above provincial average</li> <li>➤ Math 30-1 results saw a decrease in acceptable standard and standard of excellence, though we remain above provincial average</li> <li>➤ Math 30-2 results saw an increase in acceptable standard and standard of excellence, and results remain higher than the province</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Continue to implement District-wide Focus on Reading</li> <li>⇒ Expand professional development for teachers to further enhance their expertise in literacy instruction</li> <li>⇒ Use Prior Level of Achievement Reports to identify sites that have demonstrated improvements in mathematics results</li> <li>⇒ Use Accountability Pillar Data for Math 30-1 and 30-2 to identify schools that have demonstrated improvement greater than the province consistently</li> <li>⇒ Professional learning supports and resources will continue to be developed and provided in the area of numeracy</li> <li>⇒ Work to eliminate the achievement gap between First Nations, Métis and Inuit students and other students</li> <li>⇒ Continue to identify a First Nations, Métis and Inuit lead teacher at each school</li> </ul>

## Goal 3: Success Beyond Schooling

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ High school completion rate has increased over the past five years and continues to do so</li> <li>➤ Drop out rates decrease</li> <li>➤ Six-year post-secondary program entry rates have increased over the past five years</li> <li>➤ In 2014–2015, 59.3 per cent of Grade 12 students were eligible for a Rutherford Scholarship</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Continue to implement Career Pathways in partnership with parents and community</li> <li>⇒ Expand High School Redesign to two more schools</li> <li>⇒ Use dashboard data to monitor and mitigate risk of high school drop out</li> <li>⇒ Work to eliminate the achievement gap between First Nations, Métis and Inuit students and other students</li> </ul>

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Goal One: An Excellent Start to Learning

Outcome: More children enter Grade 1 reaching emotional, social, intellectual, and physical development milestones.

### Key Performance Indicators

Key Performance Indicator (all can be hyperlinked to dashboard)	Results for school year (in percentages)					Evaluation
	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	Improvement**
<b>EARLY LEARNING</b>						
Early Years Evaluation – Teacher Assessment Percentage of children entering (pre) and leaving (post)* District Kindergarten programs that meet developmental milestones (Source: EYE-TA)		61	63	62 (pre) 81 (post)	61 (pre) 81 (post)	+
• Awareness of Self and Environment		78	82	80 (pre) 92 (post)	80 (pre) 92 (post)	+
• Social Skills and Approaches to Learning		75	76	75 (pre) 89 (post)	77 (pre) 89 (post)	+
• Cognitive Skills		62	64	64 (pre) 90 (post)	62 (pre) 89 (post)	+
• Language and Communication		73	77	75 (pre) 88 (post)	75 (pre) 88 (post)	+
• Physical Development		69	70	70 (pre) 93 (post)	70 (pre) 92 (post)	+
o Fine Motor						
o Gross Motor		78	79	77 (pre) 93 (post)	76 (pre) 92 (post)	+
Total number of students enrolled in an Early Childhood Services program (Kindergarten, Early Learning, Early Education)	6,935	7,558	7,895	8,107	8,519	n/a
Percentage of parents with children in Preschool or Kindergarten who indicate they know what their child must be able to do in order to be successful in Kindergarten. (Source: District Feedback Survey Q 34b)				92.9		Baseline
Percentage of parents with children in the early years who indicate they feel their child will be ready for learning in Grade 1. (Source: District Feedback Survey Q 34c)				90.0		Baseline

\*Note: EYE-TA post assessments began in the 2014-2015 school year.

\*\*Note: Improvement for EYE-TA is based on post-results compared to pre-results.

# Priority 1:

**Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.**

## 2015-2016 Results

Research provides evidence that the early years are an important time in children's lives where they are forming the skills they need to support their growth and lifelong learning. As a result, the District provides the Early Childhood Services Program to enable more children to attain emotional, social, intellectual and physical developmental milestones before they enter Grade 1.

In the 2015–2016 school year, 8,519 children were enrolled in an Early Childhood Services Program (Kindergarten, early learning, early education), an increase of over 20 per cent from 6,935 children in 2011–2012. To enable more pre-Kindergarten students to access pre-Kindergarten programs near their home, the District completed an Early Years pilot project in 2015–2016. This model creates satellite schools with early years programming supported by a “hub” school with a full complement of specialized services. The success of the pilot has resulted in the District's three-year Early Childhood Services Program Expansion that will enable more students to access early years programming throughout the city.

For Kindergarten students, the District continued to use the Early Years Evaluation—Teacher Assessment (EYE-TA) tool to assess the children's readiness to enter Grade 1. At the beginning of the school year, 61 per cent of District Kindergarten students met all of the developmental milestones considered foundational to readiness for schooling. At the end of the school year, this percentage increased to 81 per cent. In particular, children made the greatest gains in cognitive skills, with 27 per cent more children meeting developmental milestones at the end of the school year compared to the beginning of the year. In addition to regular Kindergarten programming, the District conducted a language-literacy project in schools with a high number of children at-risk for delayed literacy development, and the Math Interactive Learning Experience (MILE) Research Study to improve math skills of young children with developmental difficulties.

In summary, the District is increasing access to early years programming to students around the City of Edmonton, implementing the EYE-TA to inform instruction and learning time to children, and exploring opportunities to build capacity for staff working with early years children and their families. Following best-practice research, the District is investing in early childhood education, as earlier interventions can result in children making greater gains throughout their school trajectory.

## Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- **EYE-TA:** Continue to implement the EYE-TA in all Kindergarten classrooms every fall to gather baseline data on developmental milestones and a post-assessment in the spring to measure growth and identify children who may need continued support as they enter Grade 1. Results from the EYE-TA data continue to inform the delivery of targeted programming. Two examples include the following initiatives:
  - Language/Literacy Pilot: Continue to expand this program prototype to other grades and schools to build teacher capacity and support children identified as at-risk for literacy difficulties.
  - MILE Research Study in partnership with the University of Alberta to improve math skills in young children with developmental difficulties.

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

- **Early Years Programs Expansion:** Continue to implement Phase 1 of the Early Years Expansion and Distribution Strategy and prepare for Phases 2 and 3.
- **Early Years Resources to Build Capacity:** Continue to develop and implement Early Years resources, initiatives and professional development opportunities for teachers, administrators, staff working in the Early Years and families. Identify and use a variety of measures to capture impact of resources and professional learning.

## Detailed Analysis

For more indepth analysis of results (including disaggregated data for First Nations, Métis and Inuit students, English language learners, and students requiring specialized supports and services) and for detailed priority strategies, see the [Strategic Plan Update: Priority 1 Goal One: An Excellent Start to Learning](#).

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Goal Two: Success for Every Student

Outcome: More students demonstrate growth and achieve learner outcomes with a specific focus on literacy and numeracy.

### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>STUDENT LEARNING OUTCOME</b>						
Overall percentage of students in Grade 6 and 9 who achieved the acceptable standard and the standard of excellence on Provincial Achievement Tests (overall cohort results) (Source: Accountability Pillar)	76.6	77.2	76.5	76.4	77.4	Improved
	23.4	23.9	23.5	23.8	25.1	Improved Significantly
Overall percentage of students who achieved the acceptable standard and the standard of excellence on diploma examinations (overall results) (Source: Accountability Pillar)	81.6	82.1	83.2	82.5	83.6	Improved Significantly
	19.7	21.7	22.0	22.4	23.4	Improved Significantly
<b>LITERACY AND NUMERACY</b>						
Overall percentage of students in Grades 6 who achieved the acceptable standard and the standard of excellence in Language Arts on Provincial Achievement Tests (overall cohort results). (Source: Accountability Pillar)	83.4	84.4	84.1	83.8	85.4	Improved Significantly
	18.4	18.8	19.6	22.5	23.7	Improved Significantly
Overall percentage of students in Grades 9 who achieved the acceptable standard and the standard of excellence in Language Arts on Provincial Achievement Tests (overall cohort results). (Source: Accountability Pillar)	78.1	79.4	77.8	78.1	78.7	Maintained
	18.3	18.7	18.4	16.8	18.9	Improved
Overall percentage of students in Grades 6 who achieved the acceptable standard and the standard of excellence in Math on Provincial Achievement Tests (overall cohort results). (Source: Accountability Pillar)	76.3	76.9	77.4	76.2	75.6	Declined
	18.9	21.0	20.5	18.2	17.9	Declined Significantly
Overall percentage of students in Grades 9 who achieved the acceptable standard and the standard of excellence in Math on Provincial Achievement Tests (overall cohort results). (Source: Accountability Pillar)	69.1	71.3	70.8	70.2	73.0	Improved Significantly
	24.1	25.5	24.2	23.9	24.6	Maintained
Overall percentage of students who achieved the acceptable standard on English diploma examinations (overall results). (Source: Accountability Pillar)	<u>30-1</u> 82.3	<u>30-1</u> 81.2	<u>30-1</u> 82.0	<u>30-1</u> 80.1	<u>30-1</u> 81.8	Maintained
	<u>30-2</u> 83.6	<u>30-2</u> 81.9	<u>30-2</u> 83.0	<u>30-2</u> 80.4	<u>30-2</u> 82.2	Maintained
Overall percentage of students who achieved the standard of excellence English diploma examinations (overall results). (Source: Accountability Pillar)	<u>30-1</u> 10.8	<u>30-1</u> 11.0	<u>30-1</u> 11.2	<u>30-1</u> 10.1	<u>30-1</u> 10.2	Maintained
	<u>30-2</u> 7.2	<u>30-2</u> 7.9	<u>30-2</u> 8.7	<u>30-2</u> 7.0	<u>30-2</u> 7.6	Maintained
Overall percentage of students who achieved the acceptable standard on Math diploma examinations (overall results). (Source: Accountability Pillar)	<u>30-1</u> n/a	<u>30-1</u> 78.4	<u>30-1</u> 74.0	<u>30-1</u> 76.1	<u>30-1</u> 72.2	Declined Significantly
	<u>30-2</u> n/a	<u>30-2</u> 70.8	<u>30-2</u> 71.3	<u>30-2</u> 76.0	<u>30-2</u> 79.1	Improved Significantly
Overall percentage of students who achieved the standard of excellence on Math diploma examinations (overall results). (Source: Accountability Pillar)	<u>30-1</u> n/a	<u>30-1</u> 33.3	<u>30-1</u> 29.0	<u>30-1</u> 33.1	<u>30-1</u> 28.6	Declined Significantly
	<u>30-2</u>	<u>30-2</u>	<u>30-2</u>	<u>30-2</u>	<u>30-2</u>	Improved

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
	n/a	10.6	15.1	18.3	21.2	Significantly
Percentage of students in Grades 1-9 demonstrating at or above grade level in writing. (Source: HLAT)	n/a	n/a	82.4	79.2	79.3*	+
Percentage of students in Grades 1-6 demonstrating at or above grade level in reading	n/a	n/a	n/a	n/a	74.8	Baseline
Percentage of students who may need interventions based on the District's Math Intervention Programming Initiative (MIPI) <i>Note: The MIPI was implemented in the 2014-2015 school for Grades 2 to 9, and was expanded to include Grade 10 students in 2015-2016.</i>	n/a	n/a	n/a	28.0	24.5	maintaining
Percentage of students in Grades 4-12 reporting they get help with reading and writing when they need it (Source: Accountability Pillar)	85.0	87.0	n/a	87.0	86.0	-
<b>INSTRUCTIONAL SUPPORTS</b>						
Percentage of parents satisfied with special support their child has received at school (Source: Accountability Pillar)	88.0	84.0	86.0	86.0	83.0	-

\*HLAT includes 149 Fort McMurray students; 21 students had results, and 128 were marked as exempt

## Notes:

- Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
- Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
- 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.
- Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
- 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.

First Nations, Métis and Inuit Students						
Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>STUDENT LEARNING OUTCOME</b>						
Overall percentage of self-identified FNMI students in Grades 6 and 9 who achieved the acceptable standard and the standard of excellence on Provincial Achievement Tests (overall cohort results) (Source: Accountability Pillar)	51.1	55.9	52.5	52.0	55.0	+
	5.8	6.4	6.4	8.7	7.4	+
Overall percentage of self-identified FNMI students who achieved the acceptable standard and the standard of excellence on diploma examinations (overall results) (Source: Accountability Pillar)	73.8	74.1	76.0	75.7	79.7	+
	7.0	8.6	8.9	10.4	9.3	-

## Notes:

- Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- Aggregated PAT results are based upon a weighted average of per cent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
- Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
- 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.
- Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

# Priority 1:

**Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.**

## 2015-2016 Results

In the District's overall cohort result, students in Grades 6 and 9 continue to do well in achieving the acceptable standard and standard of excellence in Provincial Achievement Tests (PATs), outperforming the province. Diploma results have increased over the past five years. While the overall acceptable standard diploma results are lower than the province, standard of excellence is higher. The following is a more detailed breakout of results specific to the fundamental skills of literacy and numeracy.

### Literacy

Educators have long known that literacy is fundamental to successful learning and living. Developing strong literacy skills in students is essential for them to reach their full potential in school, the workplace and to experience a better quality of life in future years. To discover and make meaning of the world, students need the ability to acquire, create, connect, and communicate information in a variety of situations that go beyond the foundational basics of reading and writing.

Trends in data over the past five years indicate that the percentage of District students meeting the acceptable standard and the standard of excellence in Grade 6 English Language Arts and Grade 9 English Language Arts has been consistently higher than the province. Overall, the percentage of District students meeting the acceptable standard in Grade 6 English Language Arts increased this year from 83.8 per cent to 85.4 per cent and the percentage of District students meeting the standard of excellence in Grade 6 English Language Arts increased this year from 22.5 per cent to 23.7 per cent. The percentage of District students meeting the acceptable standard in Grade 9 English Language Arts increased this year from 78.1 per cent to 78.7 per cent and the percentage of District students meeting the standard of excellence in Grade 9 English Language Arts increased this year from 16.8 per cent to 18.9 per cent.

Trends in data over the past five years indicate that the percentage of District students meeting the acceptable standard and standard of excellence in English Language Arts 30-1 and 30-2 has been consistently lower than the province. However, the participation rate in 30-1 stream continues to be higher than the province. This means more students have additional post-secondary doors open to them. Overall, the percentage of District students meeting the acceptable standard in English Language Arts 30-1 increased this year from 80.1 per cent to 81.8 per cent and the percentage of District students meeting the standard of excellence in English Language Arts 30-1 was maintained, increasing nominally from 10.1 per cent to 10.2 per cent.

Overall, the percentage of District students meeting the acceptable standard in English 30-2 increased this year from 80.4 per cent to 82.2 per cent. The percentage of District students meeting the standard of excellence in English Language Arts 30-2 increased this year from 7.0 per cent to 7.6 per cent.

In support of literacy, the District introduced the District-wide Focus on Reading initiative. Furthermore, the District continued to provide formal literacy interventions (Reading Recovery, Levelled Literacy Intervention, Middle Years Literacy Intervention), specialized supports and services using the Pyramid of Intervention approach, developed literacy resources and continued to provide professional learning support to teachers.

# Priority 1:

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## Numeracy

Confidence and competence in numeracy provides the foundations for lifelong learning. In all aspects of daily life, we rely on mathematical data, projections, inferences and systematic thinking. That is why numeracy, like literacy, is so fundamental. Numeracy enables one to develop logical thinking and reasoning strategies in daily life. It is a necessary skill that supports problem solving and making sense of time, numbers, patterns and shapes for everyday activities and life. Numeracy is essential because decisions in life are so often based on numerical information; to make the best choices, we need to be numerate.

While both the District and the province showed a slight decrease in the percentage of students meeting the acceptable standard and the standard of excellence in the Grade 6 PATs in Mathematics, the five year trend data shows that the percentage of District students meeting the acceptable standard and the standard of excellence has remained consistently higher than that of the province. Overall, the percentage of District students meeting the acceptable standard in Grade 6 Mathematics decreased this year from 76.2 per cent to 75.6 per cent and the percentage of District students meeting the standard of excellence in Grade 6 Mathematics decreased slightly this year from 18.2 per cent to 17.9 per cent.

Overall, the percentage of District students meeting the acceptable standard in Grade 9 Mathematics has shown significant improvement compared to the provincial results. The percentage increased this year from 70.2 per cent to 73.0 per cent and the percentage of District students meeting the standard of excellence in Grade 9 Mathematics increased this year from 23.9 per cent to 24.6 per cent. Trends in the data over the past five years indicate that the percentage of District students meeting the acceptable standard and the standard of excellence in Grade 9 Mathematics has remained consistently higher than that of the province.

Overall, both the District and province showed a decrease in the percentage of students meeting the acceptable standard and standard of excellence in Mathematics 30-1 exams over the past five years. While the percentage of District students meeting the acceptable standard and the standard of excellence in Mathematics 30-1 is higher than the province, the District's results for students meeting the acceptable standard decreased over the previous year from 76.1 per cent to 72.2 per cent. The percentage of District students meeting standard of excellence decreased from 33.1 per cent to 28.6 per cent. While reflecting on results for Math 30-1, it should be noted that a future exam will serve as baseline for comparison.

Overall, the percentage of District students meeting the acceptable standard and the standard of excellence in Mathematics 30-2 has increased significantly over the past five years. Furthermore, the results are higher than the province. The percentage of District students meeting the acceptable standard in Mathematics 30-2 increased this year from 76.0 per cent to 79.1 per cent and the percentage of District students meeting the standard of excellence in Mathematics 30-2 increased this year from 18.3 per cent to 21.2 per cent

The District continued to implement its Numeracy Guiding Document and Action Plan, including implementing the Mathematics Intervention Programming Initiative (MIPI) tool to Grades 2-10, and providing professional learning supports for staff.

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

### In support of literacy

- The District-wide Focus on Reading will continue to develop additional ways to support student development of the essential life skill of reading. This focus will support schools in identifying students who require interventions and ensure these students receive informal and formal interventions.
- Expand professional development for Kindergarten to Grade 12 teachers with a focus on research-based approaches in the area of literacy to further develop their expertise in literacy instructions.
- Continue to offer specialized supports and services to schools.

### In support of numeracy

- Use data from the Prior Level of Achievement Reports to identify sites that have demonstrated improvement in their Mathematics results at the Grade 3, 6, and 9 levels.
- Use data from the Accountability Pillar for Mathematics 30-1 and 30-2 to identify schools that have demonstrated an improvement that is greater than the provincial per cent difference and have consistently shown results that have exceeded provincial results.
- Professional learning supports and resources will continue to be developed and provided to support classroom teachers in implementing research based best practices to support numeracy and Mathematics teaching and learning.

Alberta Education requires strategies be developed for issues identified as a *concern* or *issue* in the Accountability Pillar overall summary. The following priority strategies will be implemented or continue to be supported throughout the District with the intent to eliminate the achievement gap between First Nations, Métis and Inuit students and all other students:

- Continue to increase capacity for District staff in using culturally responsive resources, supports, and information through professional learning opportunities and school visits.
- Conduct a literature review on evidence-based strategies proven to improve literacy and numeracy outcomes for First Nations, Métis and Inuit students.
- Conduct a case study to examine elements that factor into positive change for First Nations, Métis and Inuit students in schools with the intent to support their success and achievement.
- Continue to support District schools in strategic planning for First Nations, Métis and Inuit students and gathering key educational performance indicators to evaluate the impact of current programming.

## Detailed Analysis

- For more indepth analysis of results (including disaggregated data for First Nations, Métis and Inuit students, English language learners, and students requiring specialized supports and services) and detailed priorities and strategies, see Strategic Plan Update Report: Priority 1, Goal 2—Success for Every Student—Literacy (November 1, 2016) and Strategic Plan Update Report: Priority 1, Goal 2—Numeracy (November 29, 2016).
- Additionally a report on closing the First Nations, Métis and Inuit student achievement gap will be presented at public Board on December 13, 2016.

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Goal Three: Success Beyond Schooling

Outcome: More students complete high school and are connected to career pathways that support their transition to post-secondary studies or the world of work.

### Key Performance Indicators

Key Performance Indicator		Results (in percentages)						Evaluation
		2011	2012	2013	2014	2015	2016	Improvement
<b>HIGH SCHOOL COMPLETION</b>								
Percentage of students who completed high school within three, four, and five years of entering Grade 10 (Source: Accountability Pillar)	3-yr	69.4	70.8	70.2	72.6	72.3		Improved
	4-yr	73.6	74.6	75.2	75.3	77.6		n/a
	5-yr	76.3	76.7	77.3	77.9	78.4		n/a
Percentage of Grade 12 students eligible for a Rutherford Scholarship.(Source: Accountability Pillar)		n/a	n/a	n/a	n/a	59.3		Baseline
Annual dropout rate of students aged 14 to 18. (Source: Accountability Pillar)		4.8	3.8	3.2	3.0	3.0		Improved Significantly
Percentage of students writing four or more diploma exams within three years of entering Grade 10 (Source: Accountability Pillar)		58.7	61.0	59.0	59.2	60.1		Maintained
<b>ESSENTIAL SKILLS FOR SUCCESS BEYOND SCHOOLING</b>								
Percentage of students in Grades 7-12 who indicate they are confident or comfortable with the skills they possess that are essential for success beyond schooling (Source: District Feedback Survey roll up Q 19d, 19e, 19f, 19g, 20a, 20c, 20d, 20e, 20f, 20g, 20h, 20i, 21a, 21b, 21f, 21g)						86		Baseline
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 (Source: Accountability Pillar)		81.0	80.6	82.1	82.3	83.4	84.0	Improved Significantly
Percentage of Grade 7 and 10 students reporting that they get the help they need planning for a career (Source: Accountability Pillar)		68.0	69.0	68.0	n/a	67.0	66.0	-
Percentage of parents and teachers satisfied their child or students demonstrate the knowledge, skills and attitudes necessary for lifelong learning (Source: Accountability Pillar)		67.9	68.1	68.8	69.1	70.5	70.8	+
<b>TRANSITIONS/CAREER PLANNING</b>								
Percentage of high school students who transition to post-secondary (including apprenticeship) within six years of entering Grade 10 (Source: Accountability Pillar)		59.1	61.5	61.1	61.4	61.1		Maintained
Percentage of staff, students, parents, and community that report Edmonton Public Schools prepares students to transition to the next level of education or the world of work (Source: District Feedback Survey roll up Q 9d, 22a, 22b, 25c, 28a, 28b, 7b, 14b)						83.1		Baseline

#### Notes:

- Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
- Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
- Aggregated Diploma results are a weighted average of per cent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
- 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.
- Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
- Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).
- Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2014.

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

First Nations, Métis and Inuit Students								
Key Performance Indicator		Results (in percentages)						Evaluation
		2011	2012	2013	2014	2015	2016	Improvement
<b><u>HIGH SCHOOL COMPLETION</u></b>								
Percentage of self-identified FNMI students who completed high school within three, four, and five years of entering Grade 10 (Source: Accountability Pillar)	3-yr	31.7	31.7	30.2	39.8	38.3		-
	4-yr	34.2	36.8	37.1	37.0	46.8		n/a
	5-yr	40.1	39.0	42.5	41.8	43.3		n/a
Percentage of Grade 12 self-identified FNMI students eligible for a Rutherford Scholarship (Source: Accountability Pillar)		n/a	n/a	n/a	n/a	32.7		Baseline
Annual dropout rate of self-identified FNMI students aged 14 to 18 (Source: Accountability Pillar)		9.9	8.2	8.4	6.3	8.5		+
Percentage of self-identified FNMI students writing four or more diploma exams within three years of entering Grade 10 (Source: Accountability Pillar)		15.2	19.2	16.8	20.2	20.3		+
<b><u>TRANSITIONS/CAREER PLANNING</u></b>								
High school to post-secondary transition rate of self-identified FNMI students within six years of entering Grade 10 (Source: Accountability Pillar)		27.1	25.3	25.0	26.6	26.3		-

## Notes:

1. Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
2. Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
3. 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. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

# Priority 1:

**Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.**

## 2015-2016 Results

Preparing students for their futures and equipping them to be productive contributors to society, whether as post-secondary students, members of the workplace or citizens in the community, is one of the priority outcomes of public education. Throughout K-12, students are provided opportunities that focus on the development of foundational knowledge, competencies and attitudes that will support them in being successful in school and enable them to transition into post-secondary and/or the world of work.

Overall, the District's high school completion rate has increased over the past five years. The percentage of students who completed high school in three years increased from 69.4 per cent in 2010–2011 to 72.3 per cent in 2014–2015. Overall, the District's dropout rate for students between the ages of 14 and 18 decreased 1.8 per cent from 4.8 per cent in 2010–2011 to 3.0 per cent in 2014–2015.

Alberta Education tracks Grade 10 students for six years after high school to determine if students entered a post-secondary level program at an Alberta post-secondary institution or registered in an Alberta apprenticeship program. Out-of-province enrolment is estimated. The high school to post-secondary transition rate is one measure that can demonstrate the effectiveness of the province's K-12 education system in ensuring students are ready for further education and training. Overall, the District's six-year high school transition rate increased 2.0 per cent over the past five years from 59.1 per cent in 2010–2011 to 61.1 per cent in 2014–2015.

The Rutherford Scholarship recognizes and rewards the academic achievements at the high school level and encourages students to pursue post-secondary studies. Eligibility of the scholarship is calculated by determining the percentage of Alberta Grade 12 students who have an average of 75 per cent or higher in eligible Grade 10, 11, or 12 courses. Overall, 59.3 per cent of Grade 12 students were eligible for a Rutherford Scholarship in 2014–2015.

Overall, the District continues to show growth in achievement in Diploma exams. The per cent of District students who achieved the acceptable standard on diploma exams increased by 1.1 per cent over the previous year, and 2.0 per cent over the past five years from 81.6 per cent in 2011–2012 to 83.6 per cent in 2015–2016. Furthermore, the per cent of District students who achieved standard of excellence on diploma exams increased by 1.0 per cent from the previous year, and 3.7 per cent over the past five years from 19.7 per cent in 2011–2012 to 23.4 per cent in 2015–2016.

The District has a number of initiatives to support high school completion. By organizing schools in catchment groups, the District is supporting student transition through the K–12 journey. Several District schools are participating in Alberta Education's high school redesign project, and the District has implemented its Career Pathways model to enable more students to discover their interests and understand the opportunities available to them. As well, the District continues to provide alternative ways for students to complete high school through City Centre Campus, Centre High, Metro Continuing Education and Argyll Centre where students can learn online.

# Priority 1:

Foster growth and success for every student by supporting their journey from early learning through high school completion and beyond.

## Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Continue to implement Career Pathways in partnership with parents and community to enable students to discover their interests, understand opportunities available to them and prepare for a pathway that helps them find dignity and fulfillment in life.
- Expand and build upon High School Redesign to include two more high schools in the 2016–2017 school year.
- Use the web-based dashboard tool to monitor the five greatest predictors of high school dropout to enable schools to identify students at-risk of not completing high school, and provide targeted interventions to support students early and keep them on track to complete high school.

Alberta Education requires strategies be developed for issues identified as a *concern* or *issue* in the Accountability Pillar overall summary. To support the success of First Nations, Métis and Inuit Students the District will:

- Conduct a case study to examine elements that factor into positive change for First Nations, Métis and Inuit students in schools with the intent to support their success and achievement.
- Support and work towards increasing student attendance at summer transition programs and increasing mentorship opportunities in collaboration with key stakeholders.
- Conduct a research study to identify strategies and practices that have the greatest impact on improving First Nations, Métis, and Inuit student achievement. A plan will be developed to share the findings of this study with District schools to help inform schools in their efforts to reduce/eliminate the achievement gap.

## Detailed Analysis

- For more indepth analysis of results (including disaggregated data for First Nations, Métis and Inuit students, English language learners, and students requiring specialized supports and services) and detailed priorities and strategies, see the Strategic Plan Update Report: Priority 1, Goal 3: Success Beyond Schooling (November 1, 2016). Also, the Strategic Plan Update Report: District Accountability Pillar Survey Results (May 2016) profiles an additional measure.
- Additionally, a report on closing the First Nations, Métis and Inuit student achievement gap will be presented at public Board on December 13, 2016.



## PRIORITY 2

Provide welcoming, high quality learning  
and working environments.

## Priority 2:

### Provide welcoming, high quality learning and working environments.

#### Goal 1: A Focus on Well-being and Student Citizenship

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ 89.5 per cent of teachers, parents, and students agree students are safe at school, are learning the importance of caring for others, and are learning respect for others and are treated fairly in school</li> <li>➤ 84.9 per cent of teachers, parents, and students are satisfied students model active citizenship</li> <li>➤ To promote welcoming, inclusive, safe and healthy environments, the District built upon existing protocols and processes, enhanced staff capacity, and supported students in their growth and awareness of personal well-being</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Continue to utilize a Mental Health Transition Team as children and youth transition into and out of tertiary services in the community</li> <li>⇒ Develop and implement administrative regulations to support the implementation of Board Policy AEBB.BP—Wellness of Students and Staff</li> <li>⇒ Continue to identify a comprehensive School Health lead teacher in each school</li> <li>⇒ Collaborate with external stakeholders to provide resources and professional development in mental health, bullying, and creating safe, welcoming and inclusive school environments</li> </ul>

#### Goal 2: Quality Infrastructure for All

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ Preparation for the opening of three new schools in 2016–2017, and modernization of one school completed</li> <li>➤ 800 projects with \$15.5 million provincial funding initiated as part of Major Maintenance Plan</li> <li>➤ Established District Centre programming for students with severe special needs</li> <li>➤ Space utilization continued to trend upward to 77 per cent in 2015–2016</li> <li>➤ Yellow bus services provided to 11,605 District students; 96.7 per cent of student riders had one-way bus trips less than 60 minutes</li> <li>➤ All schools have a minimum of 100 mb SuperNetlink.</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Implement Year 2 of the District Infrastructure Plan, including: supporting 11 new school openings in 2017–2018; developing and conducting engagement for High School Accommodation Planning; initiating Working Committees with three mature school communities</li> <li>⇒ Complete detailed design phase of Edmonton Student Transportation Authority (ESTA)</li> <li>⇒ Over the next three years, invest in a refresh of core technical infrastructure in all schools</li> </ul>

#### Goal 3: Building Capacity through a Culture of Collaboration and Distributed Leadership

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ 80 per cent of staff believe professional development opportunities significantly contributed to their professional growth; 92 per cent felt District professional development focused on District priorities</li> <li>➤ A centralized professional learning management system implemented to support a coordinated, integrated approach to professional development</li> <li>➤ Leadership Development Framework doubled to 497 registrants in 2015–2016; 94.0 per cent of participants are satisfied with the modules and 98.0 per cent would recommend the modules</li> <li>➤ First and Second Year Principal Development Program offered to 28 principals</li> <li>➤ New Staff Orientation offered to 481 new hires</li> <li>➤ 383 teachers participated in Teacher Induction Program</li> <li>➤ Orientation sessions offered to supply staff</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Support school and catchment professional learning</li> <li>⇒ Continue to support Summer Institutes</li> <li>⇒ Continue to develop and implement Principal Readiness Framework</li> <li>⇒ Support development of head custodians</li> </ul>

## Priority 2:

Provide welcoming, high quality learning and working environments.

### Goal 4: A Culture of Excellence and Accountability

#### Summary of Results

- Participated in Alberta Education's Assurance Pilot Project
- Teachers, parents, and students are satisfied with the overall quality of education (90.8 per cent), feel the District has shown improvement or stayed the same (80.9 per cent), and are satisfied with the accessibility, effectiveness and efficiency of programs and services (71.5 per cent)
- District dashboard created to support culture of evidence-based decision-making
- Catchments engaged in formal strategic planning processes
- Launched E-Biz in October 2015 to support financial process efficiencies

#### Opportunities for Moving Forward

- ⇒ Develop a planning and reporting cycle to support timely reporting of data
- ⇒ Develop Phase 2 of the dashboard
- ⇒ Administration will bring forward Strategic Plan Update Reports to enable meaningful dialogue regarding the District's progress related to its Strategic Plan



## Priority 2:

Provide welcoming, high quality learning and working environments.

### Goal One: A Focus on Well-being and Student Citizenship

Outcome: Our learning and working environments are welcoming, inclusive, safe and healthy.

#### Key Performance Indicators

Key Performance Indicator (all can be hyperlinked to dashboard)	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>WELL BEING</b>						
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. (Source: Accountability Pillar)	88.5	89.3	88.7	90.0	89.5	Maintained
<b>CITIZENSHIP/ LEADERSHIP</b>						
Percentage of teachers, parents and students that are satisfied that students model active citizenship. (Source: Accountability Pillar)	83.2	84.4	83.6	85.3	84.9	Improved
Your child is encouraged at school to be involved in activities that help the community (Source: Accountability Pillar)	76.0	77.0	78.0	79.0	79.0	=
Students are encouraged at your school to be involved in activities that help the community (Source: Accountability Pillar)	89.0	89.0	90.0	91.0	92.0	+
Percentage of staff, students, and parents that report that Edmonton Public Schools provides learning environments that promote student citizenship and leadership. (Source: District Feedback Survey roll up Q 7f, 21e, 21h, 25d, 9d)				88.7		Baseline
<b>WELCOMING</b>						
Percentage of students, parents, and community and partners that report that Edmonton Public Schools provides learning and working environments that are welcoming. (Source: District Feedback Survey roll up Q 3e, 11c, 4, 8c, 26d)				85.4		Baseline
Students at your child's school respect each other (Source: Accountability Pillar)	76.0	80.0	81.0	81.0	81.0	=
Students at your school respect each other (Source: Accountability Pillar)	93.0	93.0	93.0	94.0	94.0	=
<b>INCLUSIVE</b>						
Percentage of staff, students, parents, and community that report that Edmonton Public Schools provides learning and working environments that are inclusive. (Source: District Feedback Survey roll up Q 3c, 3d, 13e, 13f, 7c, 7d, 9a, 13a, 15d, 8e, 26e)				86.9		Baseline
Students at your child's school help each other when they can (Source: Accountability Pillar)	76.0	79.0	78.0	79.0	79.0	=
Students at your school help each other when they can (Source: Accountability Pillar)	95.0	96.0	96.0	96.0	97.0	+
<b>SAFE</b>						
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 (Source: Accountability Pillar)	88.5	89.3	88.7	90.0	89.5	-
Percentage of staff, students, parents, and community and partners that report that Edmonton Public Schools provides learning and working environments that are safe. (Source: District Feedback Survey roll up Q 13a, 13b, 13c, 13d, 15, 12a, 12b, 12c, 12d, 15, 25e, 9e, 26b)				89.1		Baseline
<b>HEALTHY</b>						
Percentage of staff and students that report that Edmonton Public Schools provides learning and working environments that are healthy. (Source: District Feedback Survey roll up Q 7c, 7d, 9e, 11b, 11c, 20b, 21c, 21d, 16c)				84.7		Baseline

Notes:

1. Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2014.
2. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

## Priority 2:

### Provide welcoming, high quality learning and working environments.

#### 2015-2016 Results

The District wants every student to grow, thrive and experience success throughout their learning journey. Consequently, the District supports student growth and development academically, socially and emotionally by ensuring they are learning in a welcoming, inclusive, safe and healthy school environment. This environment allows students to focus on their learning, prepares them for their future in post-secondary studies and/or the world of work and helps them gain a strong sense of citizenship and social responsibility.

The District students represent a diverse range of beliefs, backgrounds, cultures and circumstances. As a result, the District endeavours to have classroom and school environments that foster a sense of belonging, acceptance and safety, all of which help children learn. One key measures category in the Accountability Pillar Survey is whether school environments are perceived as safe and caring. Overall, 89.5 per cent of teachers, parents and students who completed the Accountability Pillar Survey indicated they agreed students are safe at school; learning the importance of caring for others; learning respect for others and are treated fairly in school. The District results are consistent with provincial results. While there was some variance between stakeholder groups, all responses reflected high levels of agreement among teachers (95.1 per cent), parents (89.3 per cent) and students (84.2 per cent).

The District pursued several initiatives in 2015–2016 to promote welcoming, inclusive, safe and healthy learning and working environments. These initiatives included activities that built upon existing District protocols and processes, enhanced staff capacity, and supported students in their own growth and awareness of personal well-being. This work was accomplished through the efforts of central supports, school-based initiatives, and in collaboration with various community partners whose mandate is focused on health and well-being.

The District recognizes that, through the school community, students have many opportunities to demonstrate citizenship and pursue activities that promote social responsibility. The percentage of parents, teachers and students who are “satisfied that students model the characteristics of active citizenship” continues to remain stable, with a slight dip in 2016, but an overall increase over the past five years at both the District and the province.

In summary, the District continues to perform well in providing learning and working environments that are welcoming, inclusive, safe and healthy, and continues to promote student citizenship. The District recognizes the importance of student well-being, and will continue to explore ways to further mental health services and to enhance safe and healthy school and work environments.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Explore, develop and implement additional means to strengthen mental health services by continuing to utilize a Mental Health Transition Team to provide extensive intervention supports as children and youth transition into and out of tertiary services in the community.
- Develop and implement administrative regulations that are aligned to the *School Act*, support the implementation of [\*Board Policy AEBB.BP-Wellness of Students and Staff\*](#) and provide direction to schools with respect to creating learning and working environments that support a District culture of wellness.

## Priority 2:

### Provide welcoming, high quality learning and working environments.

- Continue to identify a Comprehensive School Health lead teacher in each school to support curricular instruction and the development and implementation of strategies to create and maintain a culture of wellness for students in accordance to the *School Act* regulations and the *Guide to Education*.
- Work collaboratively with external stakeholders to coordinate and provide awareness of, and access to, available resources and professional development in the area of mental health, bullying and creating safe, welcoming and inclusive school environments.
- Continue to implement the Commit to Kids Program. This program provides a step-by-step plan to assist child-serving organizations create and maintain safe and healthy environments.

#### Detailed Analysis

- For more indepth analysis of results see the Strategic Plan Update Report: District Accountability Pillar Survey Results (May 2016).
- Additionally, a Strategic Plan Update Report on Priority 2, Goal 1: A Focus on Well-Being and Student Citizenship is anticipated in 2017.

## Priority 2:

Provide welcoming, high quality learning and working environments.

### Goal Two: Quality Infrastructure for All

**Outcome:** Students and staff benefit from high quality learning and working environments that facilitate quality program delivery through effective planning, managing and investing in District infrastructure.

#### Key Performance Indicators

Key Performance Indicator	Results					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>INFRASTRUCTURE</b>						
Number of District-requested capital projects that received provincial funding (Source: EPS)	0	6	10	5	0	n/a
New/Replacement Capital Construction projects funded	5	4	6	0	0	n/a
Approved modular classrooms	6	0	18	10	13	n/a
Major modernizations funded	2	0	4	2	0	n/a
Percentage of school space used across the District. (Source: EPS)	66.0	67.0	71.0	75.0*	77.0	+
<b>TRANSPORTATION</b>						
Number of yellow bus riders at the end of June	8,809	9,453	10,753	10,463	11,605	n/a
Percentage of yellow bus riders whose one-way trip is less than 60 minutes at end of September (Source: EPS)				98.6	96.7	-
<b>TECHNOLOGY</b>						
Percentage of District sites with a minimum of 100 mb SuperNet link	0	3.0	33.0	87.0	99.0	+
<b>STAKEHOLDER FEEDBACK</b>						
Percentage of students (3-12), staff, parents, and community and partners that report their school building is well maintained. (Source: District Feedback Survey Q 3f, 11a, 15g, 9a, 26c)				89.7		Baseline
Percentage of community agency staff and CEOs that report they have access to the school space required to support the services they offer. (Source: District Feedback Survey Q 5b and 7b)				85.3		Baseline
Percentage of community and partners that report schools are easy to access for community activities. (Source: District Feedback Survey Q 26f)				74.9		Baseline
Percentage of community and partners that report schools are accessed easily by people with physical challenges. (Source: District Feedback Survey Q 26g)				74.1		Baseline
Percentage of community and partners that report schools are appropriately located to respond to student population needs. (Source: District Feedback Survey Q 26a)				75.3		Baseline

Note:

- Beginning in 2014-2015 results use the Instructional Area Model (IAM) utilization formula which defines capacity to be 100%. Before this, the ACU was used and defined 85% as capacity.

## Priority 2:

### Provide welcoming, high quality learning and working environments.

#### 2015-2016 Results

The District believes quality infrastructure is a foundation for high quality teaching and learning. This includes our buildings and the supporting systems such as communication and transportation networks and addressing the needs of a growing student population.

To achieve this goal, the District is guided by the Infrastructure Planning Principles Policy. A District Infrastructure Plan provides the overarching framework that informs strategy, priority and action plan development to guide the way the District distributes alternative and special needs programs, secures, improves and maintains school building infrastructure, accommodates growth and ensures students have equitable access to learning environments to meet their needs, regardless of where they reside. These include, but are not limited to, the 10-year Facility Plan, a 3-Year Capital Plan, the High School Accommodation Plan, the Alternative Program Review, the Major Maintenance and Renewal Plan, Growth Accommodation Plans, Space for Students in Mature Communities and other initiatives and sub-initiatives.

In 2015–2016, the District prepared for the opening of three new schools in September 2016 and completed the modernization of Belgravia School. As well, with the District as project manager, design was completed and construction began at nine schools scheduled to open in September 2017. The District worked with Alberta Education on two other schools to be opened in September 2017. Modernizations or additions were in progress at four schools, and design was initiated for the modernization of Caernarvon School and for a new school to replace Mill Creek School.

Over 800 projects were initiated in 2015–2016 as part of the District's annual Major Maintenance Plan, with provincial funding of \$15.5 million funded primarily with Infrastructure Maintenance Renewal funds. The District completed 25 projects to upgrade schools to meet barrier free requirements, as well as numerous projects that directly impact students by improving acoustics or providing specialized classrooms.

To address student enrolment growth pressures, the District initiated installation of 10 of 14 modular classrooms requested in November 2014 and requested 15 additional units—13 of which were approved. To address alternative and special needs program growth and shifting demands, the District conducted three major alternative program activities, established District Centre programming for students with severe special needs, reorganized the distribution of mild/moderate special needs programming in response to demand and initiated with Year One of the Early Childhood Services Program Expansion.

The District continues to balance space utilization with population growth through new school construction and maintaining aging infrastructure. The utilization rate continues to trend up from 66 per cent in 2011–2012 to 77 per cent in 2015–2016.

Transportation is another component of quality infrastructure. In 2015–2016, 11,605 students attended schools outside their neighbourhood and relied on yellow bus services to transport them to and from school. The District was able to provide one-way bus trips of less than 60 minutes to 96.7 per cent of student riders. As distances and loads to designated schools continue to increase, additional new school construction in new and developing communities will help to improve overall ride times.

In 2015–2016, the District completed SuperNet upgrades for all schools, and 99 per cent of all District sites have a minimum of 100 mb SuperNet link. This infrastructure upgrade serves as the foundation to the delivery of an enhanced and more equitable internet service for all schools.

In summary, the District continues to focus on new school construction and modernization of aging schools, the upgrading of technology, and efficient transportation delivery. Addressing the ongoing student enrolment pressures, shifting demands and infrastructure maintenance will continue to be a priority.

## Priority 2:

### Provide welcoming, high quality learning and working environments.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Implement Year 2 of the District Infrastructure Plan including the following initiatives, including supporting 11 new school openings for the 2017–2018 operational year, engaging stakeholders on High School Accommodation Planning, and initiating Working Committees with three mature school groupings to explore options to best serve communities into the future.
- Continue to pursue District utility savings and improve our overall sustainability.
- Complete the detailed design phase of the ESTA initiative.
- In collaboration with other school jurisdictions provide feedback to Alberta Education regarding the Learning and Technology Policy Framework.
- Over the next three years, invest in a refresh of core technical infrastructure in all schools.

#### Detailed Analysis

- For more detailed information, see Summary of Facility and Capital Plans: The District's Ten-Year Facilities Plan and Three-Year Capital Plan.
- Additionally a Strategic Plan Update Report: Priority 2, Goal 2: Quality Infrastructure for All will be presented in 2017.



## Priority 2:

Provide welcoming, high quality learning and working environments.

### Goal Three: Building Capacity Through a Culture of Collaboration and Distributed Leadership

Outcome: Throughout their careers, all staff are provided opportunities to enhance their professional capacity and leadership with a culture of collaboration.

#### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
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. (Source: Accountability Pillar)	81.9	83.1	82.4	83.0	83.0	Maintained
<b>PROFESSIONAL DEVELOPMENT AND GROWTH</b>						
Number of registrations in professional growth opportunities through the Leadership Development Framework. (Source: District Dashboard)		226	239	245	497	+
The percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic, and contributed significantly to their ongoing professional growth. (Source: Accountability Pillar)	80.0	79.9	79.1	83.5	84.1	+
Thinking back over the past three years, to what extent do you agree or disagree that professional development opportunities made available through the jurisdiction have significantly contributed to your ongoing professional development (Source: Accountability Pillar)	77.0	76.0	76.0	80.0	80.0	=
Thinking back over the past three years, to what extent do you agree or disagree that professional development opportunities made available through the jurisdiction have been focused on the priorities of the jurisdiction (Source: Accountability Pillar)	86.0	87.0	85.0	90.0	92.0	+
Thinking back over the past three years, to what extent do you agree or disagree that professional development opportunities made available through the jurisdiction have effectively addressed your professional development needs (Source: Accountability Pillar)	77.0	77.0	76.0	80.0	80.0	=
Percentage of staff that report Edmonton Public schools supports employee professional development and growth. (Source: District Feedback Survey Q 17a)				91.8		Baseline
Percentage of staff that report they are aware of career opportunities available to them within the District. (Source: District Feedback Survey Q 17b)				92.9		Baseline
Percentage of staff that report they have opportunities to move to different roles in the District. (Source: District Feedback Survey Q 17d)				76.1		Baseline
Percentage of staff that report school-based professional learning opportunities are effective in enhancing their professional growth. (Source: District Feedback Survey Q 18a)				88.5		Baseline
Percentage of staff that report catchment level professional learning opportunities are effective in enhancing their professional growth. (Source: District Feedback Survey Q 18b)				81.6		Baseline
Percentage of staff that report other District-wide professional learning opportunities are effective in enhancing their professional growth. (Source: District Feedback Survey Q 18c)				87.2		Baseline
Percentage of staff that report out of District professional learning opportunities are effective in enhancing their professional growth. (Source: District Feedback Survey Q 18d)				66.8		Baseline
Percentage of staff that report formalized coaching and mentoring that supports my professional growth are effective in enhancing their professional growth. (Source: District Feedback Survey Q 18e)				71.3		Baseline
Percentage of staff that report they have the knowledge, skills, and resources to program and support students in need of specialized supports and services. (Source: District Feedback Survey Q 25g)				78.5		Baseline
Percentage of staff that report they have the knowledge, skills, and resources to program for and support students who are English Language Learners (ELL). (Source: District Feedback Survey Q 26a)				67.3		Baseline
Percentage of staff that report they have the knowledge, skills, and resources to program for and support students who self-identify as Status Indian/First Nations, Non-Status Indian/First Nations, Métis or Inuit. (Source: District Feedback Survey Q 26b)				68.0		Baseline

## Priority 2:

Provide welcoming, high quality learning and working environments.

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b><u>DISTRIBUTED LEADERSHIP</u></b>						
Percentage of staff that report they have opportunities in their work to develop and demonstrate their leadership skills. (Source: District Feedback Survey Q 17e)				87.6		Baseline
Percentage of staff that report the decisions made at their school/decision unit reflect collaboration. (Source: District Feedback Survey Q 13b)				90.3		Baseline
<b><u>COLLABORATION</u></b>						
Percentage of staff that report staff in their school/decision unit work as a team. (Source: District Feedback Survey Q 15b)				89.4		Baseline
Percentage of staff that report staff in their school/decision unit collaborates with other school/decision units. (Source: District Feedback Survey Q 15c)				86.4		Baseline
Percentage of parents that report the decisions made at their child's school reflect collaboration. (Source: District Feedback Survey Q 12b)				77.7		Baseline

Notes:

1. Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2014.
2. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

### 2015-2016 Results

High quality teaching and learning environments are at the heart of student success. By preparing staff with quality professional development opportunities, leadership development, opportunities for collaboration and effective supports and services; the District strives to provide the high quality teaching and learning environments necessary for student success.

According to the Accountability Pillar, 80 per cent of staff believe the professional development opportunities provided to them met their needs and significantly contributed to their professional growth. To support more effective communication of professional development opportunities and to create a more coordinated and integrated approach to professional development, the District built a centralized professional learning management system.

Ninety-two per cent of staff felt District professional development opportunities are focused on the priorities of the District, an increase from 86.0 per cent in 2011–2012. To gain further insight into the professional learning needs of staff, the District conducted a survey. The results of the survey were used to inform the development of District professional learning activities. Professional development activities are delivered through District-wide professional development, catchments schools based professional development, and Communities of Practice. Furthermore, in Summer of 2016, the District launched a range of Summer Institute learning opportunities.

The District provides opportunities for staff to grow and thrive as leaders. Through the Leadership Development Program, 39 leadership development modules were available to emerging, aspiring and existing leaders. Participants indicated they were satisfied with the modules (94.0 per cent), and indicated they would recommend the modules to others (98.0 per cent).

Components of a talent management strategy have been implemented to facilitate recruitment, retention, engagement and career development of staff to support the needs of the District. The First and Second Year Principal Development Program was offered to 28 principals. New Staff Orientation

## Priority 2:

### Provide welcoming, high quality learning and working environments.

was offered to 481 new hires. Additionally, 383 teachers took part in the Teacher Induction Program, and orientation sessions were held throughout the year for the supply educational assistants, supply administrative assistants/office staff and supply custodial staff.

In summary, the District provided many opportunities through which staff were able to enhance their professional and leadership capacity within a culture of collaboration, and will continue to expand upon its professional learning opportunities for all staff.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Use feedback from professional learning survey to inform school and catchment professional learning supported by central decision units.
- Continue to support Summer Institutes as a way of building capacity and providing increased opportunity for collaboration.
- Continue the development and implementation of the Principal Readiness Framework to support building principal capacity.
  - Implement the Aspiring Principal Development Program in the 2016–2017 year as part of the District’s work to build principal capacity.
- Develop and implement specific initiatives to support the development of head custodians to meet ongoing needs in schools.

#### Detailed Analysis

- For more indepth analysis of results see the Strategic Plan Update Report: District Accountability Pillar Survey Results (May 2016).
- For more indepth analysis of results and for detailed priority strategies, see the upcoming Strategic Plan Update Report: Priority 2, Goal 3: Building Capacity through a Culture of Collaboration and Distributed Leadership that will be presented in 2017.

## Priority 2:

Provide welcoming, high quality learning and working environments.

### Goal Four: A Culture of Excellence and Accountability

Outcome: The District is grounded in effective, efficient, equitable and evidence-based practices.

#### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
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 (Source: Accountability Pillar)	79.7	80.8	78.0	80.1	80.9	Improved Significantly
Percentage of teacher, parent and student satisfaction with accessibility, effectiveness and efficiency of programs and services for students in their community. (Source: Accountability Pillar)	70.5	70.5	65.0	71.6	71.5	=
<b>ACCOUNTABILITY AND EXCELLENCE</b>						
Percentage of teachers, parents and students satisfied with the overall quality of basic education (Source: Accountability Pillar)	90.6	91.2	89.8	91.0	90.8	Maintained
Percentage of staff that report the decisions made at their school/decision unit reflect accountability. (Source: District Feedback Survey Q 13a)				92.0		Baseline
Percentage of staff that report the decisions made at their school/decision unit reflect equity. (Source: District Feedback Survey Q 13c)				85.7		Baseline
Percentage of staff that report the decisions made at their school/decision unit reflect integrity. (Source: District Feedback Survey Q 13d)				91.1		Baseline
Percentage of staff that report they have the supports and resources they need to do their job effectively. (Source: District Feedback Survey Q 14g)				83.3		Baseline
Percentage of staff that report the structures and processes in their work environment are effective and efficient. (Source: District Feedback Survey Q 15a)				86.7		Baseline
Percentage of staff that report Edmonton Public Schools is a good place to work. (Source: District Feedback Survey 16a)				97.1		Baseline
Percentage of staff that report Edmonton Public Schools uses data to inform planning and decision-making. (Source: District Feedback Survey Q 19e)				73.6		Baseline
Percentage of staff that report Edmonton Public Schools uses resources responsibly. (Source: District Feedback Survey Q 20b)				73.2		Baseline
Percentage of staff that report work responsibilities are fair and reasonable. (Source: District Feedback Survey Q 14f)				87.4		Baseline
Percentage of parents that report the decisions made at their child's school reflect accountability. (Source: District Feedback Survey Q 12a)				75.7		Baseline
Percentage of parents that report the decisions made at their child's school reflect equity. (Source: District Feedback Survey Q 12c)				76.5		Baseline
Percentage of parents that report the decisions made at their child's school reflect integrity. (Source: District Feedback Survey Q 12d)				80.5		Baseline
Percentage of parents that report their child has access to appropriate resources to be successful in his/her school. (Source: District Feedback Survey Q 8f)				83.8		Baseline
Percentage of community and partners that report Edmonton Public Schools uses its financial resources to best meet the learning needs of students. (Source: District Feedback Survey Q 15)				68.3		Baseline

#### Notes

1. Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2014.
2. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

## Priority 2:

### Provide welcoming, high quality learning and working environments.

#### 2015-2016 Results

Edmonton Public Schools believes in public accountability and transparency, equitable practices, continuous improvement and striving for efficiencies. The District has heightened its focus on evidence-based decision-making as an approach to support its intended outcome of success for every student.

Year after year, the Accountability Pillar indicates that teachers, parents and students are satisfied with the overall quality of education provided by Edmonton Public Schools; the result in 2015–2016 was 90.8 per cent. The percentage of teachers, parents, and students with high levels of agreement that there was improvement in their school has remained relatively stable over the past five years, with both District and provincial respondents reporting a slight five-year high. Furthermore, 71.5 per cent of teachers, parents and students are satisfied with the accessibility, effectiveness and efficiency of programs and services for students in their community; this is consistent with the results achieved last year.

Foundational to the District's work is its Strategic Plan, which identifies the three Priorities and 10 Goals the District is pursuing. In addition to annual reporting through the AERR and Results Review process, the District is part of Alberta Education's Assurance Pilot Project. Through the flexibility afforded in the pilot, in 2015–2016, the District conceptualized the creation of Strategic Plan Update Board reports for implementation in 2016–2017. Furthermore, in 2015–2016, all catchments engaged in a formalized strategic planning process, and will be reporting back on progress made. As well, through the catchments, Equity funds were distributed to provide additional resources for areas of greatest needs to make a difference for students. Catchments are responsible to report on outcomes resulting from use of these funds.

More and more, the District is interested in knowing the impact of its work on, and how to influence, student outcomes. To this end, a web-based dashboard tool was created to support a culture of evidence-based decision-making. The dashboard enables school leaders to see how their students are doing on provincial and local assessments.

The District pursued several initiatives that support efficiency and equity. For example, in order to make business process more efficient, the District implemented the E-Biz Project to align District business operations with industry best practices. The new financial systems went live on October 5, 2015.

In summary, the District demonstrates accountability and excellence through a comprehensive approach to reporting grounded in effective, efficient, equitable and evidence-based practices. Moving forward, the District will continue to build upon this culture of evidence-based decision-making.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- In support of the District's overall strategic direction and intentional efforts to foster an evidence-based decision-making culture, through the flexibility of the Assurance Pilot, the District will further refine a planning and reporting cycle that supports timely reporting of data.
- In support of monitoring progress towards the goals and outcomes of the District's Priorities, work will continue on the conceptualization and development of Phase 2 of the Dashboard.
- Administration will bring forward Strategic Plan Update Reports with timely, detailed data analysis to enable meaningful dialogue regarding the District's progress related to its Strategic Plan and to inform decision-making.

#### Detailed Analysis

- For more indepth analysis of results see the Strategic Plan Update Report: District Accountability Pillar Survey Results (May 2016).



## **PRIORITY 3**

**Enhance public education through communication, engagement and partnerships.**

# Priority 3:

## Enhance public education through communication, engagement and partnerships.

### Goal 1: Parents as Partners

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ 81.0 per cent of parents were involved in their child's education, and 79.0 per cent were satisfied with the opportunity to be involved</li> <li>➤ SchoolZone unique page visits increased by 15.0 per cent</li> </ul>	<ul style="list-style-type: none"> <li>⇒ See parent input to inform the review and update of the Strategic Plan 2018–2022</li> <li>⇒ Continue to work closely with the Alberta School Council Association</li> </ul>

### Goal 2: Supports for the Whole Child

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ School-Community Relationship document and electronic tracking tool created</li> <li>➤ 158 leases to organizations that provide child care, education partners, pre-Kindergarten programs, government/public service and general community service</li> <li>➤ Community engagement model under development</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Continue to develop a partnership framework to support District leaders in their strategic work with community stakeholders</li> <li>⇒ Launch the School Community Relationship Identifier tracking tool</li> </ul>

### Goal 3: Engaged and Effective Governance

Summary of Results	Opportunities for Moving Forward
<ul style="list-style-type: none"> <li>➤ Board approved the student senate model of student governance</li> <li>➤ Teacher Collaboration Committee created to support teacher dialogue on priority topics</li> <li>➤ Stakeholders engaged on many infrastructure projects, including: Attendance Areas for New Schools, High School Accommodation Planning, Growth Accommodation in Summerside, mature communities</li> <li>➤ Social media followers increased from previous year: Facebook (59.0 per cent increase), Twitter for @EPSBNews (34.0 per cent increase). Furthermore, video views increased 27.0 per cent views with a 31.0 per cent increase of minutes watched.</li> <li>➤ The District's website, epsb.ca, had 61.0 per cent more visitors in 2015-2016 compared to the previous year.</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Implement the 2016–2017 District Feedback Survey</li> <li>⇒ Fully implement the Student Senate model</li> <li>⇒ Develop a framework to support review of administrative regulations</li> </ul>

## Priority 3:

Enhance public education through communication, engagement and partnerships.

### Goal One: Parents as Partners

Outcome: Parents are provided opportunities to be involved in their child's education.

#### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>PARENTAL INVOLVEMENT</b>						
Percentage of parents and teachers satisfied with parental involvement in decisions about their child's education. (Source: Accountability Pillar)	77.8	78.7	78.9	79.5	78.9	Maintained
To what extent are you involved in decisions about your child's education (parents) (Source: Accountability Pillar, p. 189)	81.0	81.0	82.0	82.0	81.0	-
To what extent are you involved in decisions at your child's school (parents) (Source: Accountability Pillar, p. 189).	58.0	59.0	59.0	60.0	59.0	-
How satisfied or dissatisfied are you that your input into decisions at your child's school is considered (parents). (Source: Accountability Pillar, p. 189).	63.0	65.0	65.0	66.0	64.0	-
How satisfied or dissatisfied are you with the opportunity to be involved in decisions about your child's education (parents). (Source Accountability Pillar: p. 189).	79.0	80.0	78.0	80.0	79.0	-
How satisfied or dissatisfied are you with the opportunity to be involved in decisions at your child's school (parents). (Accountability Pillar, p. 189).	74.0	75.0	75.0	75.0	74.0	-
To what extent are parents or guardians involved in decisions about their child's education (teachers) (Source: Accountability Pillar, p. 189).	80.0	80.0	82.0	82.0	82.0	=
To what extent are parents or guardians involved in decisions at your school (teachers) (Source: Accountability Pillar, p. 189).	76.0	76.0	78.0	79.0	79.0	=
How satisfied or dissatisfied are you with the opportunity for parents or guardians to be involved in decisions about their child's education (teachers). (Source: Accountability Pillar, p. 193)	91.0	91.0	91.0	91.0	92.0	+
How satisfied or dissatisfied are you with the opportunity for parents or guardians to be involved in decisions at your school. (Source: Accountability Pillar, p. 193).	89.0	90.0	90.0	90.0	90.0	=
[How satisfied or dissatisfied are you] that the input of parents or guardians into decisions at your school is considered (teachers). (Source: Accountability Pillar, p. 193).	86.0	88.0	89.0	89.0	88.0	-
Percentage of parents that report that they have opportunities to communicate with their child's teacher. (Source: District Feedback Survey Q 20)				96.6		Baseline
Percentage of parents that report that they feel that student progress is reported on an ongoing and timely manner. (Source: District Feedback Survey Q 15)				88.7		Baseline
Percentage of parents that report that the information they receive about their child's learning at school tells them what they need to know in order to help their child be successful in school. (Source: District Feedback Survey Q 18)				82.9		Baseline
Percentage of parents involved in the IPP process that reported they felt part of a team with teachers and other staff. (Source: District Feedback Survey Q 5)				72.1		Baseline
Percentage of parents that report they are welcome at their child's school. (Source: District Feedback Survey Q 7a)				94.4		Baseline
Percentage of parents that report they are aware of opportunities they have to be involved in their child's education. (Source: District Feedback Survey Q 7c)				88.8		Baseline
Percentage of staff that report at their school, parent(s)/guardian(s) have opportunities to be involved to the best of their ability in their child's education. (Source: District Feedback Survey Q 26e)				94.6		Baseline
Percentage of students (Grade 3-12) who report that their parent(s)/guardian(s) discuss(es) their report card with them. (Source: District Feedback Survey Q 17b and 18c)				85.7		Baseline

Notes:

- Survey results for the province and some school authorities were impacted by changes in the number of students responding to the survey through the introduction of the Tell THEM From ME survey tool in 2014.
- Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (\*).

## Priority 3:

### Enhance public education through communication, engagement and partnerships.

#### 2015-2016 Results

A child's first "teachers" in life are their parents—and a lot of life learning has happened before a child's first day of school. Through the K–12 journey towards high school completion, parents are extending responsibility for growth and development of their children to include school staff. This is both a privilege and opportunity for parents and educational staff in schools to work together so that each child grows, thrives and experiences school success in their readiness for life beyond Grade 12.

Overall, the percentage of parents and teachers who are satisfied with parental involvement in decisions about their child's education has remained steady over the past five years and was 78.9 per cent in 2015–2016. More specifically, 81.0 per cent of parents who responded to Alberta Education's Accountability Pillar Survey indicated they were involved in decisions about their child's education, and 79.0 per cent were satisfied with the opportunity to be involved in their child's education, both consistent results since 2011–2012.

There are a number of opportunities provided to parents to be part of their child's education including participating on school councils, volunteering at school, engaging in school communications, engaging in school conversations that inform planning and decision-making, and actively supporting their child's learning. Related to School Councils, annually, the District provides free School Council orientation sessions and ongoing support. Furthermore, the District provides communication materials to parents through the District's website (epsb.ca) and SchoolZone. SchoolZone continues to be a popular way to communicate and engage with parents; over the past year there was a 15.0 per cent increase in unique page visits.

The District is also intentional about providing opportunities to engage with parents as partners in student learning. To encourage parent engagement, the District continues to collaborate with community partners who offer supports such as dinner and childcare. Often, these supports enable parents to logistically attend an event at the school and participate in their child's learning experience. To further support parent involvement in their child's learning, the District also develops parent friendly tools and resources. These materials are used by schools to help engage and support parent involvement.

In summary, the District continues to identify ways to partner with parents in the education of students. Parents perceive they are actively involved in their child's education, but less so in their child's school. The District will continue to work to identify ways to implement best practices related to parent engagement.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Engage parents in the consultation process to inform the review and update of the Strategic Plan 2018–2022.
- Continue to explore how best to effectively inform, communicate, and engage with parents.
- Continue to work closely with the Alberta School Council Association to provide opportunities for parents to engage with each other and their school communities.
- Through the District Feedback Survey, Results Review and budget planning processes continue to seek feedback from parents.

## Priority 3:

Enhance public education through communication, engagement and partnerships.

### Detailed Analysis

- For more indepth analysis of results see the Strategic Plan Update Report: District Accountability Pillar Survey Results (May 2016).
- For more indepth analysis of results and for detailed priority strategies, see the upcoming Strategic Plan Update Report: Priority 1, Goals 1,2,3: Engagement and Partnerships in 2017.



## Priority 3:

Enhance public education through communication, engagement and partnerships.

### Goal Two: Supports for the Whole Child.

Outcome: Community partnerships are established to provide supports and services to foster growth and success of students and families.

#### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>PARTNERSHIPS</b>						
Percentage of staff that report Edmonton Public Schools has partnerships that enhance student success. (Source: District Feedback Survey Q 20d)				79.9		Baseline
Percentage of staff that report that their school has access to supports and services for students with challenging circumstances. (Source: District Feedback Survey Q 26c)				80.4		Baseline
Percentage of parents that report that they are aware of community partners in their child's school. (Source: District Feedback Survey Q 26)				37.8		Baseline
Percentage of community agency staff that report they have a positive working relationship with school staff that enables meeting their agency's mandate in support of students. (Source: District Feedback Survey Q 5a)				96.9		Baseline
Percentage of community agency CEOs that report they have a positive working relationship with Edmonton Public Schools' Central Office staff. (Source: District Feedback Survey Q 7a)				91.2		Baseline
Percentage of community agency staff that report they see a direct link between school-based supports and services their agency provides and student growth and success. (Source: District Feedback Survey Q 5d)				99.0		Baseline
Percentage of community agency staff that report there are processes to support effective communication and decision-making between their agency and school staff. (Source: District Feedback Survey Q 5c)				89.8		Baseline

#### 2015-2016 Results

The entire community has a role to play in supporting student success. The diversity and complexity of need across our student body requires expertise, knowledge and skills beyond that of professional educators. In order for all students to engage and learn in the classroom no matter their background, capabilities or circumstances, we will need to work closely with our fellow community stakeholders who share our commitment to the success and wellbeing of children and youth.

These community supports reflect a broad range of services from school nutrition to cultural programming. The organizations with whom the District collaborates include post-secondary institutions, members of the business community, not-for profit organizations, community service clubs and other areas of government. The District strategically seeks out community partners whose expertise and programming align with the demographic complexity and diversity of our students and families.

To better understand the broad range of community-school relationships that not only support students, but also provide services for parents, enhance the work of our staff, and contribute overall to a thriving school community, the District has developed the *School-Community Relationship* document and electronic tracking tool to enable school leaders to record information about the various community supports provided at their school. Data from the tracking tool will support schools in their work with community and will also provide a District-level perspective to community engagement.

## Priority 3:

### Enhance public education through communication, engagement and partnerships.

The District also leases available space in both open and closed schools to day cares, before and after school cares and other community organizations providing services that benefit students and families. In 2015–2016, the District had 158 leases to organizations that provide child care, education partners, pre-Kindergarten programs, government/public services and general community services.

In summary, working collaboratively with external stakeholders is a critical strategy towards the success of all students. To support this work, the District will continue to build a partnership framework that provides District leaders with resources to guide their efforts in exploring, developing, implementing, and maintaining strategic relationships with community stakeholders.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented.

- Continue to develop a partnership framework. The framework is building upon the foundational document, *School-Community Relationship Identifier*, and will be structured around the following components:
  - A partnership cycle tool kit containing information, tools and resources to support District leaders in their thinking and navigating through the various stages of a relationship with an external stakeholder.
  - Launch the School-Community Relationship Identifier tracking tool and provide support to school leaders around the entering of their data.
  - A central point of contact and support for both schools and community stakeholders.
  - A signed agreement protocol that includes templates and exemplars, a signing authority protocol and a signed agreement records management structure.
  - Supporting administrative regulations.
- In collaboration with the City of Edmonton and key community partners, the District will engage with stakeholders of the broader school community around the future direction and purpose of the Rundle School building upon the opening of the new Ivor Dent School next door.

#### Detailed Analysis

- For more indepth analysis of results and for detailed priority strategies, see the upcoming Strategic Plan Update Report: Priority 1, Goals 1, 2, 3: Engagement and Partnerships in 2017.

## Priority 3:

Enhance public education through communication, engagement and partnerships.

### Goal Three: Engaged and Effective Governance

Outcome: The District is committed to ongoing communication, participation and engagement that enhances public education.

#### Key Performance Indicators

Key Performance Indicator	Results (in percentages)					Evaluation
	2012	2013	2014	2015	2016	Improvement
<b>DISTRICT GOVERNANCE</b>						
Number of staff, students, parents and community members who responded to the District Feedback Survey. [Dashboard]				57,063		Baseline
Percentage of staff that report they are aware of the District's vision, values and priorities. (Source: District Feedback Survey Q 12a)				95.8		Baseline
Percentage of staff that report their work aligns to the District's strategic plan. (Source: District Feedback Survey Q 12b)				86.4		Baseline
Percentage of staff that report that the decisions of the Superintendent supports the success and well-being of students and staff. (Source: District Feedback Survey Q 19b)				85.5		Baseline
Percentage of staff that report that the decisions of the Board of Trustees supports the success and wellbeing of students and staff. (Source: District Feedback Survey Q 19a)				78.8		Baseline
Percentage of parents that report they have contacted their child's school Trustee. (Source: District Feedback Survey Q 31)				24.4		Baseline
Percentage of parents that contacted their Trustee that report they were satisfied with the outcome. (Source: District Feedback Survey Q 32)				73.3		Baseline
Percentage of community and partners that report their organization understands how to navigate the various levels and departments of Edmonton Public Schools that supports how they work together. (Source: District Feedback Survey Q 7c)				61.8		Baseline
<b>ENGAGEMENT/COMMUNICATION</b>						
Percentage of staff that report they have opportunities to provide input into decision-making that affects their work. (Source: District Feedback Survey Q 14 c)				87.8		Baseline
Percentage of staff that report Edmonton Public Schools is transparent in its communications and decision-making processes. (Source: District Feedback Survey Q 20a)				75.7		Baseline
Percentage of parents that report staff at their child's school build trust and foster positive relationships within the school community. (Source: District Feedback Survey Q 9b)				85.0		Baseline
Percentage of community and partners that report Edmonton Public Schools is perceived positively by the neighborhood. (Source: District Feedback Survey Q 26h)				83.1		Baseline
Percentage of community and partners that report Edmonton Public Schools is actively connected to the neighbourhood. (Source: District Feedback Survey Q26i)				68.3		Baseline

## Priority 3:

### Enhance public education through communication, engagement and partnerships.

#### 2015-2016 Results

The District strives for transparent and trusting relationships with all educational stakeholders—students, staff, parents, community and partners through inclusive and responsive communication and processes. The District is laying the foundation for generative participation, public assurance and confidence in decision-making and policy development through communication, engagement and accountability. In the 2015–2016 school year, the District sought the voice and perspective of stakeholders to inform decision-making in a variety of areas. Some of the opportunities to engage and consult with our stakeholders are highlighted below.

Students: The District continued to offer a Legacy student cohort to foster and promote youth awareness and participation in governance. In June 2015, the Board tasked Legacy students to conceptualize a model of student governance to support meaningful engagement between the Board and District students. Legacy students proposed a model built upon a Student Senate with Student Trustee representation; the Board approved this model for implementation in the 2016–2017 school year.

Staff: To gain insight into teacher perspective, the District provided teachers with the opportunity to respond to a survey highlighting key topics relevant to the District’s education context today. Thirty per cent of the District’s teachers chose to respond to the survey. The District then created a Teacher Collaboration Committee (TCC) and used priority topics from the survey to support teacher dialogue. The TCC’s discussion was documented and summarized in a report. The TCC complements other structures in place to capture staff voice—including the Superintendent’s Community of Practice in Education (SCOPE) and principal advisory committees.

Parents and Community: The District recognizes that schools are vibrant assets in the heart of Edmonton communities. As such, the District values community and parent voice to inform key decisions around District infrastructure. In 2015–2016, the District engaged with stakeholders on a number of initiatives: Attendance Areas for New Schools, High School Accommodation Planning, Growth Accommodation in the Summerside neighbourhood and infrastructure discussions with three mature communities. In order to reach as many stakeholders as possible, the District used a variety of engagement approaches including face-to-face-public meetings, social media, online surveys and live webcasts of stakeholder meetings. These discussions are ongoing and will continue in the 2016–2017 school year.

As well, parents and the community can be involved on the Inclusive Learning Advisory Committee, which discusses policy, regulation and practice regarding inclusive education.

Community and Partners: The District continued to consult and engage with external stakeholders on a number of initiatives. For example, many of the 21 Career Pathways sub-councils and working groups include external stakeholders from post secondary, industry and community. These sub-councils help to shape direction and inform the implementation of Career Pathways. As well, the District demonstrated commitment to the Truth and Reconciliation Commission’s Calls to Action in collaboration with partners such as the City of Edmonton, Edmonton Catholic Schools, Canadian Native Friendship Centre and Elders, Knowledge Keepers and Cultural Advisors through Reconciliation in Education Week.

Policy Development: The Board of Trustees continued to review, align and consolidate Board policies to current legislation. The Board reviewed and consolidated 17 policies and three policies (AA.BP Stakeholder Relations, FA.BP Human Resources Framework, FGB.BP Evaluation of Superintendent of Schools) were brought forward for approval. Prior to approval, each policy was posted for stakeholder review and feedback. In total, we received 238 responses. Furthermore, work began around the safe and caring foundational policies. This work will continue in the 2016–2017 school year including stakeholder engagement.

## Priority 3:

### Enhance public education through communication, engagement and partnerships.

The District continues to explore new ways to communicate with parents and community members through livestreaming of public meetings, presenting information in new ways and reaching various audiences through social media. For example, compared to last year, the District had an 59 per cent increase in Facebook page followers, a 34 per cent increase of Twitter followers for @EPSBNews and a 27 per cent increase of video views with a 31 per cent increase of minutes watched.

As well, the number of visitors to the District's website increased by 61 per cent and 1,700 submissions were provided through the epsb.ca contact form.

In summary, the District continues to build on its strengths by providing many avenues and opportunities for stakeholders to communicate their perspective and express their opinions on key District initiatives and explore ways to communicate in a way that is meaningful and relevant to stakeholders. In the 2016–2017 school year, the District will be able to monitor perspectives, progress and opportunities for improvement related to communication, participation and engagement through the District Feedback Survey.

#### Areas Moving Forward 2016-2019 Priority Strategies

To build upon current successes, the following strategies over the next three years will be implemented:

- Implement the 2016-2017 District Feedback Survey across four stakeholder groups (staff, students, parents, community) to seek perspectives related to the Strategic Plan.
- Continue to engage community and parents around student accommodation and future needs and use of District infrastructure.
- Fully implement the Student Senate model, support student selection of three student trustees, in 2016–2017, and conduct an evaluation of the model.
- Develop a framework to support review of administrative regulations.

#### Detailed Analysis

- For a more detailed report regarding student governance, see [Strategic Plan Update: Student Senate 2016-17 Work Plan](#).
- Additionally, see the upcoming Strategic Plan Update Report: Priority 3, Goals 1,2,3: Engagement and Partnerships in 2017.

## Summary of Financial Results and Budget Summary

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[Financial Statements and Budget will be discussed at November 29, 2016 Board meeting]

[Financial Statements and Budget will be discussed at November 29, 2016 Board meeting]

[Financial Statements and Budget will be discussed at November 29, 2016 Board meeting]

# Capital and Facilities Projects and Plans

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The District strives to provide high quality learning and working environments for all of its students and staff. To achieve this goal, the District is guided by the Infrastructure Planning Principles Policy. A District Infrastructure Plan provides the overarching framework that informs strategy, priority and action plan development to guide the way the District distributes alternative and special needs programs, secures, improves and maintains school building infrastructure, accommodates growth, ensures students have equitable access to learning environments to meet their needs, regardless of where they live. These include, but are not limited to, the 10-year Facility Plan, a 3-Year Capital Plan, the High School Accommodation Plan, the Alternative Program Review, the Major Maintenance and Renewal Plan, Growth Accommodation Plans, Space for Students in Mature Communities and other initiatives and sub-initiatives.

The District's *Three-Year Capital Plan 2017-2020*, guided by the *Planning Principles*, was approved by the Board on March 15, 2016, and submitted to the Province of Alberta. The Plan included a request for 27 capital priorities, none of which have been approved for funding by the government of Alberta to date.

## Previously Funded Capital Projects Status

In collaboration with the Government of Alberta as project managers, three new schools were completed and equipped to welcome students for September 1, 2016, openings:

- Dr. Margaret-Ann Armour School in Windermere—Ambleside neighbourhood (Grades K-9, 600 student capacity);
- Nellie Carlson School in Terwillegar Heights—MacTaggart neighbourhood (Grades K-9, 900 student capacity);
- Roberta MacAdams School in Heritage Valley—Blackmud Creek neighbourhood (Grades K-6, 650 student capacity).

The District continues to work with the Government of Alberta to support the modernization of the Alberta School for the Deaf (scheduled for substantial completion in September 2017), as well as the completion of Michael Phair School in Lewis Farms—Webber Greens neighbourhood (Grades 7–9, 900 students), and Ivor Dent School, a new K–9 replacement school in the Greater Lawton area (Grades K–9, 650 students), which are all scheduled to open in September 2017.

In terms of capital projects funded by the Government of Alberta but project managed by our District, modernization of Belgravia School was completed earlier in 2016. A modernization of Vimy Ridge Academy is 77 per cent complete, with completion scheduled for early 2017. A modernization of Ross Sheppard School is 55 per cent complete, with completion scheduled for 2018. A 600 student capacity addition to Lillian Osborne School is scheduled for completion in February 2017. Design has been initiated for the modernization of Caernarvon School, as well as for a new school to replace Mill Creek School. Design and construction tendering for nine additional new schools scheduled to open in September of 2017 was completed, and construction began. These include:

- Constable Daniel Woodall School—Windermere Estates neighbourhood (Grades K-6, 650 students)
- Dr. Lila Fahlman School—Allard neighbourhood (Grades K-9, 900 students)
- Kim Hung School—Granville neighbourhood (Grades K-9, 900 students)
- Jan Reimer School—The Orchards neighbourhood (Grades K-9, 900 students)
- Shauna May Seneca School—Walker neighbourhood (Grades K-9, 900 students)
- David Thomas King—Secord neighbourhood (Grades K-9, 900 students)
- Hilwie Hamdon School—Hudson neighbourhood (Grades K-9, 900 students)
- Donald R. Getty School—Chappelle-west neighbourhood (Grades K-9, 900 students)
- Svend Hansen School—Laurel neighbourhood (Grades K-9, 900 students)

## Infrastructure Maintenance Renewal (IMR) and Other Projects

Over 800 projects were initiated in 2015–2016 as part of the District's annual Major Maintenance plan, funded primarily through the IMR (Infrastructure Maintenance Renewal) funding stream. The provincial funding support for IMR for 2015–2016 was \$15.5M. The District completed over 25 projects to upgrade schools to meet barrier free requirements, as well as numerous projects that directly impact students by improving acoustics or specialized classrooms, such as science or CTS labs. The District also started design and construction on a number of projects related to building energy efficiency by upgrading mechanical or electrical components within the building. Five projects to facilitate Special Needs District Centres were designed and initiated for 2016 operationalization.

## Addressing Student Enrolment Growth Pressures

Over the course of the 2015–2016 school year, the District received and initiated installation of 10 of 14 modular classrooms requested in November 2014. In November 2015, the District requested 15 additional units for accommodating students in growth pressure areas. Thirteen were approved and they are now in process of being installed and operationalized at the following schools: Ellerslie School (4), Crawford Plains School (3), Velma E. Baker School (2), Pollard Meadows School (2), and Meyokumin School (2). Due to over capacity challenges at Michael Strembitsky School, community consultation was held regarding the redirection of all kindergarten students to Satoo School (with expansion to Grade 1 for 2017–2018), as well as the redirection of all students from the northeast portions of Summerside neighbourhood to Ellerslie School. These redirections were approved for implementation for September 2016. The District's *Three-Year Capital Plan 2017-2020* included a request for 13 new school capital priorities to serve rapidly growing new growth areas in the District. None of these new school requests have been approved for funding by the Government of Alberta.

## Alternative and Special Needs Program Growth and Shifting Demands

Three major alternative program activities were conducted in 2015–2016. Following community and parent engagement, the Nellie McClung Program for junior high girls was consolidated from three sites to two, effective September 2016. Two new alternative program sites were established: Chinese Bilingual programming for Kindergarten and Grade 1 students was established at Parkallen School to serve students from southwest Edmonton; French Immersion programming was established at Oliver School for Kindergarten and Grade 1 students, and deactivated in response to a insufficient demand during pre-enrolment.

District Centre programming for students with severe special needs was established at the following four sites: new Interactions programming at Dovercourt School, Lee Ridge School, Dr. Margaret-Ann Armour School, and Individual Support programming was established at Bannerman School.

The distribution of mild/moderate special needs programming was reorganized throughout 2015–2016 in response to demand, with 15 new or reactivated District Centre classes and 11 deactivated classes. Highlights include: Division IV Strategies programming at the Academy at King Edward broadened to include two newly approved classes at a second high school campus, McNally School; a second class of Community Living Skills programming established at both Lynnwood School and Eastglen School; Strategies programming (one class) was deactivated at Steele Heights School and one class established at Lawton School; a Strategies class was deactivated at both Westlawn and Edith Rogers schools; Literacy programming was deactivated at Kate Chegwin School.

Year One of the Early Childhood Services Program Expansion was initiated in 2015–2016 with sites established at Bissett School (two classes), Callingwood School (two classes), Grovenor School (two classes), Lansdowne School (two classes), and Steinhauer School (two classes). In 2015–2016, Student Program Distribution also began exploring feasible and sustainable sites for year two as part of the District-wide roll out plan for early learning program expansion.

## Parental Involvement and Community Engagement

Throughout the 2015–2016 school year, District administration conducted a series of community-based engagement processes related to the site selection for nine new schools to open in September 2017, and attendance areas for three new schools which opened in September 2016. Five additional community engagement meetings were held to gather input on potential attendance areas for the 11 new schools to open in September 2017. Stakeholder input was also coordinated in relation to the naming of nine of the new schools opening in 2017. Community engagement was also initiated with three school community groupings involving 15 different schools to introduce the *Space for Students in Mature Communities* initiative. This is a continuation of exploration of alternative approaches to delivering 21<sup>st</sup> Century Learning Facilities in mature areas of the city, based on successful engagement with the Greater Lawton and Greater Highlands school communities. The community engagement processes incorporated media briefings, website content, print and social media advertising, roadside signage, letters to parents, community leagues and City officials, and multiple public and community stakeholder meetings. A series of community engagement meetings and surveys were conducted around addressing over capacity challenges at Michael Strembitsky School. A series of information meetings were also held to share information and collect feedback on High School Accommodation Planning.

### Summary of Facility and Capital Plans

A summary of the District's Ten-Year Facilities Plan and Three-Year Capital Plan can be viewed on the District's website: [epsb.ca/ourdistrict/results/capitalplanning](http://epsb.ca/ourdistrict/results/capitalplanning).

## Whistleblower Protection

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Section 32(3) of the *Public Interest Disclosure Act* (2013) requires that school authorities include their annual report of disclosures in the Annual Education Results Report or combined Three-Year Education Plan/Annual Education Results Report.

Edmonton Public Schools is committed to acting with integrity and to ethical behaviour in all matters. As such, the District created the Administrative Regulation FBEC.AR—Public Interest Disclosure (Whistleblower Protection), available here: [epsb.ca/ourdistrict/policy/f/fbec-ar](https://epsb.ca/ourdistrict/policy/f/fbec-ar), effective December 1, 2014, to assign roles, responsibilities and define expectations for District procedures that facilitate employees to make confidential disclosures about serious wrongdoing in a safe setting that is free from reprisal.

Edmonton Public Schools reported no disclosures for 2015–2016.

# Appendix A:

## Accountability Pillar Measure Evaluation References

### 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 - 65.90	65.90 - 70.33	70.33 - 79.81	79.81 - 84.65	84.65 - 100.00
PAT: Excellence	0.00 - 9.97	9.97 - 13.45	13.45 - 19.56	19.56 - 25.83	25.83 - 100.00
Diploma: Acceptable	0.00 - 73.76	73.76 - 81.00	81.00 - 86.67	86.67 - 90.27	90.27 - 100.00
Diploma: Excellence	0.00 - 7.14	7.14 - 13.16	13.16 - 19.74	19.74 - 24.05	24.05 - 100.00
Diploma Exam Participation Rate (4+ Exams)	0.00 - 31.10	31.10 - 44.11	44.11 - 55.78	55.78 - 65.99	65.99 - 100.00
Rutherford Scholarship Eligibility Rate	0.00 - 43.18	43.18 - 49.83	49.83 - 59.41	59.41 - 70.55	70.55 - 100.00
Sh 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:

- 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%.
- Drop Out Rate measure: As "Drop Out Rate" is inverse to most measures (e.g. 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)

Edmonton Public Schools is helping to shape the future in every one of our classrooms. We're focused on ensuring each student learns to their full potential and develops the ability, passion and imagination to pursue their dreams and contribute to their community.



**DATE:** November 29, 2016

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Audited Financial Statements 2015-2016

**ORIGINATOR:** Todd Burnstad, Chief Financial Officer

**RESOURCE STAFF:** Krista Brandon, Vanessa-Croswell-Klettke, Madonna Proulx

**REFERENCE:** N/A

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## ISSUE

On an annual basis, Alberta Education requires the District to complete and submit audited financial statements on an August 31, fiscal year end by November 30.

## BACKGROUND

This report:

- includes the audited financial statements, notes to the financial statements and unaudited schedules
- includes the Auditor's Report from PricewaterhouseCoopers LLP (PwC) regarding their audit opinion.

## RELATED FACTS

Under Section 150 of the *School Act*, the Board Chair is required to present the auditor's report to a public Board meeting to provide an opportunity for discussion.

On November 25, 2016, the Audit Committee had an opportunity to review and discuss the audited financial statements and auditor's letter regarding the opinion.

The Audit Committee approved the following recommendation be brought forward to the Board of Trustees for approval.

## RECOMMENDATION

**That the 2015-2016 audited financial statements, notes to the financial statements and unaudited schedules be approved.**

## NEXT STEPS

Once approved, the 2015-2016 Audited Financial Statements will be posted on the District website and also forwarded to the Minister of Education by November 30, 2016.

## ATTACHMENTS and APPENDICES

ATTACHMENT I Audited Financial Statements for the year ended August 31, 2016

TB:ja

**AUDITED  
FINANCIAL STATEMENTS  
FOR THE YEAR ENDED AUGUST 31, 2016**  
[School Act, Sections 147(2)(a), 148, 151(1) and 276]

**Edmonton School District No. 7**

Legal Name of School Jurisdiction

**One Kingsway Centre for Education Edmonton AB T5H 4G9**

Mailing Address

**(780) 429-8000    todd.burnstad@epsb.ca**

Telephone & Fax Numbers, and Email Address

**SCHOOL JURISDICTION MANAGEMENT'S RESPONSIBILITY FOR FINANCIAL REPORTING**

The financial statements of Edmonton School District No. 7 presented to Alberta Education have been prepared by school jurisdiction management which has responsibility for their preparation, integrity and objectivity. The financial statements, including notes, have been prepared in accordance with Canadian Public Sector Accounting Standards and follow format prescribed by Alberta Education.

In fulfilling its reporting responsibilities, management has maintained internal control systems and procedures designed to provide reasonable assurance that the school jurisdiction's assets are safeguarded, that transactions are executed in accordance with appropriate authorization and that accounting records may be relied upon to properly reflect the school jurisdiction's transactions. The effectiveness of the control systems is supported by the selection and training of qualified personnel, an organizational structure that provides an appropriate division of responsibility and a strong system of budgetary control.

***Board of Trustees Responsibility***

The ultimate responsibility for the financial statements lies with the Board of Trustees. The Board reviewed the audited financial statements with management in detail and approved the financial statements for release.

***External Auditors***

The Board appoints external auditors to audit the financial statements and meets with the auditors to review their findings. The external auditors were given full access to school jurisdiction records.

***Declaration of Management and Board Chair***

To the best of our knowledge and belief, these financial statements reflect, in all material respects, the financial position, results of operations and cash flows for the year in accordance with Canadian Public Sector Accounting Standards.

**BOARD CHAIR**

**Mr. Michael Janz**

Name

Signature

**SUPERINTENDENT**

**Mr. Darrel Robertson**

Name

Signature

**SECRETARY-TREASURER OR TREASURER**

**Mr. Todd Burnstad**

Name

Signature

Board-approved Release Date

c.c. ALBERTA EDUCATION, Financial Reporting & Accountability Branch  
8th Floor Commerce Place, 10155-102 Street, Edmonton AB T5J 4L5  
EMAIL: mei-ling.irwin@gov.ab.ca AND robert.mah@gov.ab.ca  
PHONE: Mei-Ling: (780) 415-8940; Robert: (780) 427-3855 FAX: (780) 422-6996

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November 29, 2016

## **Independent Auditor's Report**

### **To the Audit Committee of the Board of Trustees Edmonton School District No.7**

We have audited the accompanying financial statements of Edmonton School District No. 7, which comprise statement of financial position as at August 31, 2016 and the statements of operations, cash flows, change in net debt, and remeasurement gains and losses for the year then ended, and the related notes, which comprise a summary of significant accounting policies and other explanatory information.

#### **Management's responsibility for the financial statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian public sector accounting standards, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

#### **Auditor's responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### **Opinion**

In our opinion, the financial statements present fairly, in all material respects, the financial position of Edmonton School District No.7 as at August 31, 2016 and the results of its operations, its remeasurement gains and losses, change in its net debt and its cash flow for the year then ended in accordance with Canadian public sector accounting standards.

## **Chartered Professional Accountants**

*PricewaterhouseCoopers LLP*

TD Tower, 10088 – 102 Avenue, Edmonton, Alberta, Canada T5J 3N5

T: +1 780 441 6700, F: +1 780 441 6776

"PwC" refers to PricewaterhouseCoopers LLP, an Ontario limited liability partnership.

**STATEMENT OF FINANCIAL POSITION**  
As at August 31, 2016 (in dollars)

		2016	2015
<b>FINANCIAL ASSETS</b>			
Cash and cash equivalents	(Schedule 5; Note 3)	\$ 286,929,625	\$ 239,064,306
Accounts receivable (net after allowances)	(Note 4)	\$ 22,652,650	\$ 7,296,948
Portfolio investments		\$ -	\$ -
Other financial assets		\$ -	\$ -
<b>Total financial assets</b>		<b>\$ 309,582,275</b>	<b>\$ 246,361,254</b>
<b>LIABILITIES</b>			
Bank indebtedness	(Note 5)	\$ -	\$ -
Accounts payable and accrued liabilities	(Note 6)	\$ 76,488,211	\$ 50,542,244
Deferred revenue	(Note 7)	\$ 724,550,281	\$ 661,564,460
Employee future benefit liabilities	(Note 8)	\$ 9,902,700	\$ 10,064,530
Liability for contaminated sites		\$ -	\$ -
Other liabilities	(Note 9)	\$ 1,060,658	\$ 2,649,588
Debt	(Note 10)		
Supported: Debentures and other supported debt		\$ -	\$ -
Unsupported: Debentures and capital loans		\$ 13,583,639	\$ 14,163,106
Mortgages		\$ -	\$ -
Capital leases		\$ -	\$ -
<b>Total liabilities</b>		<b>\$ 825,585,489</b>	<b>\$ 738,983,928</b>
<b>Net financial assets (debt)</b>		<b>\$ (516,003,214)</b>	<b>\$ (492,622,674)</b>
<b>NON-FINANCIAL ASSETS</b>			
Tangible capital assets	(Schedule 6)		
Land		\$ 837,590	\$ 837,590
Construction in progress		\$ 107,652,311	\$ 21,900,914
Buildings	\$ 1,203,201,295		
Less: Accumulated amortization	\$ (611,829,245)	\$ 591,372,050	\$ 614,896,195
Equipment	\$ 124,237,062		
Less: Accumulated amortization	\$ (106,790,011)	\$ 17,447,051	\$ 20,336,808
Vehicles	\$ 3,079,416		
Less: Accumulated amortization	\$ (2,216,931)	\$ 862,485	\$ 1,102,581
Computer Equipment	\$ 40,634,460		
Less: Accumulated amortization	\$ (27,895,136)	\$ 12,739,324	\$ 13,117,710
<b>Total tangible capital assets</b>		<b>\$ 730,910,811</b>	<b>\$ 672,191,798</b>
Prepaid expenses	(Note 11)	\$ 1,789,966	\$ 2,534,925
Other non-financial assets	(Note 12)	\$ 2,768,039	\$ 3,957,781
<b>Total non-financial assets</b>		<b>\$ 735,468,816</b>	<b>\$ 678,684,504</b>
<b>Accumulated surplus</b>	(Schedule 1; Note 13)	<b>\$ 219,465,602</b>	<b>\$ 186,061,830</b>
Accumulating surplus / (deficit) is comprised of:			
Accumulated operating surplus (deficit)		\$ 219,465,602	\$ 186,061,830
Accumulated rereasurement gains (losses)		\$ -	\$ -
		<b>\$ 219,465,602</b>	<b>\$ 186,061,830</b>
<b>Contractual obligations</b>	(Note 14)		
<b>Contingent liabilities</b>	(Note 15)		

The accompanying notes and schedules are part of these financial statements.

**STATEMENT OF OPERATIONS**  
**For the Year Ended August 31, 2016 (in dollars)**

	Budget 2016	Actual 2016	Actual 2015
<b>REVENUES</b>			
Alberta Education	\$ 983,637,900	\$ 999,312,051	\$ 949,281,061
Other - Government of Alberta	\$ 3,528,400	\$ 4,000,245	\$ 3,950,928
Federal Government and First Nations	\$ 1,971,500	\$ 2,362,433	\$ 2,081,618
Other Alberta school authorities	\$ 647,900	\$ 930,877	\$ 1,018,587
Out of province authorities	\$ -	\$ -	\$ -
Alberta municipalities-special tax levies	\$ -	\$ -	\$ -
Property taxes	\$ -	\$ -	\$ -
Fees <span style="float:right">Reclassified</span>	\$ 38,568,000	\$ 39,083,594	\$ 37,786,137
Other sales and services <span style="float:right">Reclassified</span>	\$ 14,309,900	\$ 15,922,867	\$ 16,871,767
Investment income	\$ 1,000,000	\$ 3,105,962	\$ 2,289,386
Gifts and donations	\$ 6,170,700	\$ 7,969,921	\$ 8,954,837
Rental of facilities	\$ 4,398,500	\$ 4,148,259	\$ 4,169,695
Fundraising	\$ 1,475,400	\$ 1,998,332	\$ 1,665,631
Gains on disposal of capital assets	\$ -	\$ 1	\$ 3,033,239
Other revenue	\$ -	\$ -	\$ -
<b>Total revenues</b>	<b>\$ 1,055,708,200</b>	<b>\$ 1,078,834,542</b>	<b>\$ 1,031,102,886</b>
<b>EXPENSES</b>			
Instruction - ECS <span style="float:right">Reclassified</span>	\$ 59,581,751	\$ 73,447,888	\$ 68,700,179
Instruction - Grades 1 - 12 <span style="float:right">Reclassified</span>	\$ 780,784,271	\$ 735,375,646	\$ 693,785,385
Plant operations and maintenance <span style="float:right">Reclassified</span>	\$ 141,584,632	\$ 144,973,812	\$ 139,208,328
Transportation <span style="float:right">Reclassified</span>	\$ 39,461,771	\$ 38,807,077	\$ 36,920,381
Board & system administration <span style="float:right">Reclassified</span>	\$ 35,178,351	\$ 33,628,317	\$ 31,415,107
External services <span style="float:right">Reclassified</span>	\$ 22,675,664	\$ 19,198,030	\$ 20,702,171
<b>Total expenses</b>	<b>\$ 1,079,266,440</b>	<b>\$ 1,045,430,770</b>	<b>\$ 990,731,551</b>
<b>Operating surplus (deficit)</b>	<b>\$ (23,558,240)</b>	<b>\$ 33,403,772</b>	<b>\$ 40,371,335</b>

The accompanying notes and schedules are part of these financial statements.

School Jurisdiction Code: <b>3020</b>		
<b>STATEMENT OF CASH FLOWS</b> <b>For the Year Ended August 31, 2016 (in dollars)</b>		
	2016	2015
<b>CASH FLOWS FROM:</b>		
<b>A. OPERATING TRANSACTIONS</b>		
Operating surplus (deficit)	\$ 33,403,772	\$ 40,371,335
Add (Deduct) items not affecting cash:		
Total amortization expense	\$ 43,107,850	\$ 40,536,334
Gains on disposal of tangible capital assets	\$ (1)	\$ (3,033,239)
Losses on disposal of tangible capital assets	\$ -	\$ -
Expended deferred capital revenue recognition	\$ (33,061,120)	\$ (31,502,258)
Deferred capital revenue write-down / adjustment	\$ -	\$ -
Donations in kind	\$ -	\$ -
Changes in:		
Accounts receivable	\$ (15,355,702)	\$ 16,463,745
Prepays	\$ 744,959	\$ (613,287)
Other financial assets	\$ -	\$ -
Non-financial assets	\$ 1,189,742	\$ (283,980)
Accounts payable, accrued and other liabilities	\$ 24,357,037	\$ 17,429,334
Deferred revenue (excluding EDCR)	\$ 87,544,046	\$ 60,616,121
Employee future benefit liabilities	\$ (161,830)	\$ (435,734)
Other (describe)	\$ -	\$ -
<b>Total cash flows from operating transactions</b>	<b>\$ 141,768,753</b>	<b>\$ 139,548,371</b>
<b>B. CAPITAL TRANSACTIONS</b>		
Purchases of tangible capital assets		
Land	\$ -	\$ -
Buildings	\$ (88,529,137)	\$ (35,106,897)
Equipment	\$ (1,239,869)	\$ (2,125,253)
Vehicles	\$ (61,839)	\$ (129,407)
Computer equipment	\$ (3,493,123)	\$ (6,544,628)
Net proceeds from disposal of unsupported capital assets	\$ 1	\$ 3,239,116
Other (describe)	\$ -	\$ -
<b>Total cash flows from capital transactions</b>	<b>\$ (93,323,967)</b>	<b>\$ (40,667,069)</b>
<b>C. INVESTING TRANSACTIONS</b>		
Purchases of portfolio investments	\$ -	\$ -
Dispositions of portfolio investments	\$ -	\$ 45,006
Remeasurement (gains) losses reclassified to the statement of operations	\$ -	\$ (767)
Change in endowments	\$ -	\$ -
Other (describe)	\$ -	\$ -
<b>Total cash flows from investing transactions</b>	<b>\$ -</b>	<b>\$ 44,239</b>
<b>D. FINANCING TRANSACTIONS</b>		
Issue of debt	\$ -	\$ -
Repayment of debt	\$ (579,467)	\$ (753,506)
Other factors affecting debt (describe)	\$ -	\$ -
Issuance of capital leases	\$ -	\$ -
Repayment of capital leases	\$ -	\$ -
Other factors affecting capital leases (describe)	\$ -	\$ -
Other (describe)	\$ -	\$ -
<b>Total cash flows from financing transactions</b>	<b>\$ (579,467)</b>	<b>\$ (753,506)</b>
<b>Increase (decrease) in cash and cash equivalents</b>	<b>\$ 47,865,319</b>	<b>\$ 98,172,035</b>
<b>Cash and cash equivalents, at beginning of year</b>	<b>\$ 239,064,306</b>	<b>\$ 140,892,271</b>
<b>Cash and cash equivalents, at end of year</b>	<b>\$ 286,929,625</b>	<b>\$ 239,064,306</b>

The accompanying notes and schedules are part of these financial statements.

**STATEMENT OF CHANGE IN NET DEBT**  
**For the Year Ended August 31, 2016 (in dollars)**

	2016	2015
Operating surplus (deficit)	\$ 33,403,772	\$ 40,371,335
Effect of changes in tangible capital assets		
Acquisition of tangible capital assets	\$ (101,826,863)	\$ (47,827,132)
Amortization of tangible capital assets	\$ 43,107,850	\$ 40,536,334
Net carrying value of tangible capital assets disposed of	\$ -	\$ 205,880
Write-down carrying value of tangible capital assets	\$ -	\$ -
Other changes	\$ -	\$ -
<b>Total effect of changes in tangible capital assets</b>	<b>\$ (58,719,013)</b>	<b>\$ (7,084,918)</b>
Changes in:		
Prepaid expenses	\$ 744,959	\$ (613,287)
Other non-financial assets	\$ 1,189,742	\$ (283,980)
Net remeasurement gains and (losses)	\$ -	\$ (767)
Endowments	\$ -	\$ -
<b>Decrease (increase) in net debt</b>	<b>\$ (23,380,540)</b>	<b>\$ 32,388,383</b>
<b>Net debt at beginning of year</b>	<b>\$ (492,622,674)</b>	<b>\$ (525,011,057)</b>
<b>Net debt at end of year</b>	<b>\$ (516,003,214)</b>	<b>\$ (492,622,674)</b>

The accompanying notes and schedules are part of these financial statements.

**STATEMENT OF REMEASUREMENT GAINS AND LOSSES**

For the Year Ended August 31, 2016 (in dollars)

	2016	2015
<b>Accumulated remeasurement gains (losses) at beginning of year</b>	\$ -	\$ 767
Prior Period Adjustment (Explain)	\$ -	\$ -
Prior Period Adjustment (Explain)	\$ -	\$ -
Unrealized gains (losses) attributable to:		
Portfolio investments	\$ -	\$ -
Other	\$ -	\$ -
Amounts reclassified to the statement of operations:		
Portfolio investments	\$ -	\$ (767)
Other	\$ -	\$ -
Net remeasurement gains (losses) for the year	\$ -	\$ (767)
<b>Accumulated remeasurement gains (losses) at end of year</b>	\$ -	\$ -

The accompanying notes and schedules are part of these financial statements.

**SCHEDULE 1**

**SCHEDULE OF CHANGES IN ACCUMULATED SURPLUS**  
for the Year Ended August 31, 2016 (in dollars)

	ACCUMULATED SURPLUS	ACCUMULATED REMEASUREMENT GAINS (LOSSES)	ACCUMULATED OPERATING SURPLUS	INVESTMENT IN TANGIBLE CAPITAL ASSETS	ENDOWMENTS	UNRESTRICTED SURPLUS	INTERNALLY RESTRICTED	
							TOTAL OPERATING RESERVES	TOTAL CAPITAL RESERVES
<b>Balance at August 31, 2015</b>	\$ 186,061,830	\$ -	\$ 186,061,830	\$ 64,672,775	\$ -	\$ -	\$ 83,713,579	\$ 37,675,476
<b>Prior period adjustments:</b>								
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Adjusted Balance, August 31, 2015</b>	\$ 186,061,830	\$ -	\$ 186,061,830	\$ 64,672,775	\$ -	\$ -	\$ 83,713,579	\$ 37,675,476
Operating surplus (deficit)	\$ 33,403,772		\$ 33,403,772			\$ 33,403,772		
Board funded tangible capital asset additions				\$ 7,698,722		\$ (5,595,105)	\$ -	\$ (2,103,617)
Disposal of unsupported tangible capital assets or board funded portion of supported	\$ -		\$ -	\$ -		\$ -		\$ -
Write-down of unsupported tangible capital assets or board funded portion of supported	\$ -		\$ -	\$ -		\$ -		\$ -
Net remeasurement gains (losses) for the year	\$ -	\$ -						
Endowment expenses & disbursements	\$ -		\$ -		\$ -	\$ -		
Endowment contributions	\$ -		\$ -		\$ -	\$ -		
Reinvested endowment income	\$ -		\$ -		\$ -	\$ -		
Direct credits to accumulated surplus (Describe)	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amortization of tangible capital assets	\$ -			\$ (43,107,850)		\$ 43,107,850		
Capital revenue recognized	\$ -			\$ 33,061,120		\$ (33,061,120)		
Debt principal repayments (unsupported)	\$ -			\$ 579,467		\$ (579,467)		
Additional capital debt or capital leases	\$ -			\$ -		\$ -		
Net transfers to operating reserves	\$ -					\$ (15,784,258)	\$ 15,784,258	
Net transfers from operating reserves	\$ -					\$ -	\$ -	
Net transfers to capital reserves	\$ -					\$ (21,491,672)		\$ 21,491,672
Net transfers from capital reserves	\$ -					\$ -		\$ -
Assumption/transfer of other operations' surplus	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Changes	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Balance at August 31, 2016</b>	\$ 219,465,602	\$ -	\$ 219,465,602	\$ 62,904,234	\$ -	\$ 0	\$ 99,497,837	\$ 57,063,531

**SCHEDULE 1**

**SCHEDULE OF CHANGES IN ACCUMULATED SURPLUS  
for the Year Ended August 31, 2016 (in dollars)**

	INTERNALLY RESTRICTED RESERVES BY PROGRAM									
	School & Instruction Related		Operations & Maintenance		Board & System Administration		Transportation		External Services	
	Operating Reserves	Capital Reserves	Operating Reserves	Capital Reserves	Operating Reserves	Capital Reserves	Operating Reserves	Capital Reserves	Operating Reserves	Capital Reserves
<b>Balance at August 31, 2015</b>	\$ 83,713,579	\$ 37,675,476	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Prior period adjustments:</b>										
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Adjusted Balance, August 31, 2015</b>	\$ 83,713,579	\$ 37,675,476	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating surplus (deficit)										
Board funded tangible capital asset additions	\$ -	\$ (2,103,617)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Disposal of unsupported tangible capital assets or board funded portion of supported		\$ -		\$ -		\$ -		\$ -		\$ -
Write-down of unsupported tangible capital assets or board funded portion of supported		\$ -		\$ -		\$ -		\$ -		\$ -
Net remeasurement gains (losses) for the year										
Endowment expenses & disbursements										
Endowment contributions										
Reinvested endowment income										
Direct credits to accumulated surplus (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Amortization of tangible capital assets										
Capital revenue recognized										
Debt principal repayments (unsupported)										
Additional capital debt or capital leases										
Net transfers to operating reserves	\$ 15,784,258		\$ -		\$ -		\$ -		\$ -	
Net transfers from operating reserves	\$ -		\$ -		\$ -		\$ -		\$ -	
Net transfers to capital reserves		\$ 21,491,672		\$ -		\$ -		\$ -		\$ -
Net transfers from capital reserves				\$ -		\$ -		\$ -		\$ -
Assumption/transfer of other operations' surplus	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Changes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Balance at August 31, 2016</b>	\$ 99,497,837	\$ 57,063,531	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

**SCHEDULE OF CAPITAL REVENUE**  
**(EXTERNALLY RESTRICTED CAPITAL REVENUE ONLY)**  
**for the Year Ended August 31, 2016 (in dollars)**

	Unexpended Deferred Capital Revenue				
	Provincially Approved & Funded Projects <sup>(A)</sup>	Surplus from Provincially Approved Projects <sup>(B)</sup>	Proceeds on Disposal of Provincially Funded Tangible Capital Assets <sup>(C)</sup>	Unexpended Deferred Capital Revenue from Other Sources <sup>(D)</sup>	Expended Deferred Capital Revenue
<b>Balance at August 31, 2015</b>	\$ 44,223,279	\$ -	\$ 2,053,938	\$ 781,116	\$ 594,131,400
Prior period adjustments		\$ -		\$ -	\$ -
Adjusted balance, August 31, 2015	\$ 44,223,279	\$ -	\$ 2,053,938	\$ 781,116	\$ 594,131,400
Add:					
Unexpended capital revenue <u>received</u> from:					
Alberta Education school building & modular projects (excl. IMR)	\$ 64,561,889				
Infrastructure Maintenance & Renewal capital related to school facilities	\$ 3,805,767				
Other sources: Donations	\$ -			\$ 136,500	
Other sources:	\$ -			\$ -	
Unexpended capital revenue <u>receivable</u> from:					
Alberta Education school building & modular (excl. IMR)	\$ 16,129,308				
Other sources:	\$ -			\$ -	
Other sources:	\$ -			\$ -	
Interest earned on unexpended capital revenue	\$ -	\$ -	\$ 295,032	\$ -	
Other unexpended capital revenue:				\$ -	
Proceeds on disposition of supported capital			\$ -	\$ -	
Insurance proceeds (and related interest)			\$ -	\$ -	
Donated tangible capital assets:					\$ -
Alberta Infrastructure managed projects					\$ 8,502,895
Transferred in (out) tangible capital assets (amortizable, @ net book value)					\$ -
Expended capital revenue - current year	\$ (85,092,259)	\$ -		\$ -	\$ 85,092,259
Surplus funds approved for future project(s)	\$ -	\$ -			
Other adjustments:	\$ -	\$ -	\$ -	\$ -	\$ -
Deduct:					
Net book value of supported tangible capital dispositions or write-offs					\$ -
Other adjustments:		\$ -	\$ -	\$ -	\$ -
Capital revenue recognized - Alberta Education					\$ 33,061,120
Capital revenue recognized - Other Government of Alberta					\$ -
Capital revenue recognized - Other revenue					\$ -
<b>Balance at August 31, 2016</b>	<b>\$ 43,627,984</b>	<b>\$ -</b>	<b>\$ 2,348,970</b>	<b>\$ 917,616</b>	<b>\$ 654,665,434</b>
	(A)	(B)	(C)	(D)	
<b>Balance of Unexpended Deferred Capital Revenue at August 31, 2016 (A) + (B) + (C) + (D)</b>				<b>\$ 46,894,570</b>	

**Unexpended Deferred Capital Revenue**

(A) - Represents funding received from the Government of Alberta to be used toward the acquisition of new approved tangible capital assets with restricted uses only. Please specify department if funds received from a source other than Alberta Education.

(B) - Represents any surplus of funding over costs from column (A) approved by Minister for future capital expenditures with restricted uses only.

(C) - Represents proceeds on disposal of provincially funded restricted-use capital assets to be expended on approved capital assets per 10(2)(a) of Disposition of Property Reg. 181/2010.

(D) - Represents capital revenue received from entities OTHER THAN the Government of Alberta for the acquisition of restricted-use tangible capital assets.

**SCHEDULE OF PROGRAM OPERATIONS**  
for the Year Ended August 31, 2016 (in dollars)

REVENUES	2016							2015
	Instruction		Plant Operations and Maintenance	Transportation	Board & System Administration	External Services	TOTAL	TOTAL
	ECS	Grades 1 - 12						
(1) Alberta Education	\$ 73,876,723	\$ 739,927,126	\$ 115,070,947	\$ 26,983,603	\$ 36,456,213	\$ 6,997,439	\$ 999,312,051	\$ 949,281,061
(2) Other - Government of Alberta	\$ -	\$ 2,900,566	\$ 474,573	\$ -	\$ 18,805	\$ 606,301	\$ 4,000,245	\$ 3,950,928
(3) Federal Government and First Nations	\$ -	\$ 1,451,644	\$ -	\$ 7,304	\$ 37,493	\$ 865,992	\$ 2,362,433	\$ 2,081,618
(4) Other Alberta school authorities	\$ 167,403	\$ 502,475	\$ 255,272	\$ 5,727	\$ -	\$ -	\$ 930,877	\$ 1,018,587
(5) Out of province authorities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(6) Alberta municipalities-special tax levies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(7) Property taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(8) Fees	\$ 551,826	\$ 25,198,981		\$ 11,768,592		\$ 1,564,195	\$ 39,083,594	\$ 37,786,137
(9) Other sales and services	\$ (552)	\$ 3,836,342	\$ 1,477,358	\$ 45,754	\$ 730,049	\$ 9,833,916	\$ 15,922,867	\$ 16,871,767
(10) Investment income	\$ -	\$ 2,534,428	\$ 571,534	\$ -	\$ -	\$ -	\$ 3,105,962	\$ 2,289,386
(11) Gifts and donations	\$ 481,901	\$ 7,508,888	\$ (2,752)	\$ -	\$ (16,445)	\$ (1,671)	\$ 7,969,921	\$ 8,954,837
(12) Rental of facilities	\$ -	\$ 579,905	\$ 3,248,595	\$ -	\$ 20,426	\$ 299,333	\$ 4,148,259	\$ 4,169,695
(13) Fundraising	\$ -	\$ 1,998,332	\$ -	\$ -	\$ -	\$ -	\$ 1,998,332	\$ 1,665,631
(14) Gains on disposal of tangible capital assets	\$ -	\$ -	\$ 1	\$ -	\$ -	\$ -	\$ 1	\$ 3,033,239
(15) Other revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(16) <b>TOTAL REVENUES</b>	\$ 75,077,301	\$ 786,438,687	\$ 121,095,528	\$ 38,810,980	\$ 37,246,541	\$ 20,165,505	\$ 1,078,834,542	\$ 1,031,102,886
<b>EXPENSES</b>								
(17) Certificated salaries	\$ 42,582,591	\$ 418,267,964			\$ 5,357,225	\$ 5,333,537	\$ 471,541,317	\$ 452,620,092
(18) Certificated benefits	\$ 10,175,045	\$ 99,944,489			\$ 1,400,682	\$ 1,117,223	\$ 112,637,439	\$ 107,864,586
(19) Non-certificated salaries and wages	\$ 11,454,010	\$ 112,507,137	\$ 46,388,699	\$ 1,205,374	\$ 15,673,048	\$ 3,756,698	\$ 190,984,966	\$ 177,398,070
(20) Non-certificated benefits	\$ 2,906,013	\$ 28,544,341	\$ 15,535,667	\$ 362,520	\$ 3,936,205	\$ 899,101	\$ 52,183,847	\$ 47,429,971
(21) SUB - TOTAL	\$ 67,117,659	\$ 659,263,931	\$ 61,924,366	\$ 1,567,894	\$ 26,367,160	\$ 11,106,559	\$ 827,347,569	\$ 785,312,719
(22) Services, contracts and supplies	\$ 5,605,479	\$ 68,992,854	\$ 48,631,228	\$ 37,239,183	\$ 5,850,181	\$ 7,852,693	\$ 174,171,618	\$ 164,073,680
(23) Amortization of supported tangible capital assets	\$ -	\$ -	\$ 33,061,120	\$ -	\$ -		\$ 33,061,120	\$ 31,502,258
(24) Amortization of unsupported tangible capital assets	\$ 713,538	\$ 7,008,731	\$ 746,001	\$ -	\$ 1,394,447	\$ 184,013	\$ 10,046,730	\$ 9,034,076
(25) Supported interest on capital debt	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ 20,056
(26) Unsupported interest on capital debt	\$ -	\$ -	\$ 420,532	\$ -	\$ -		\$ 420,532	\$ 438,089
(27) Other interest and finance charges	\$ 11,212	\$ 110,130	\$ 190,565	\$ -	\$ 16,529	\$ 54,765	\$ 383,201	\$ 350,673
(28) Losses on disposal of tangible capital assets	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
(29) Other expense	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
(30) <b>TOTAL EXPENSES</b>	\$ 73,447,888	\$ 735,375,646	\$ 144,973,812	\$ 38,807,077	\$ 33,628,317	\$ 19,198,030	\$ 1,045,430,770	\$ 990,731,551
(31) <b>OPERATING SURPLUS (DEFICIT)</b>	\$ 1,629,413	\$ 51,063,041	\$ (23,878,284)	\$ 3,903	\$ 3,618,224	\$ 967,475	\$ 33,403,772	\$ 40,371,335

**SCHEDULE OF PLANT OPERATIONS AND MAINTENANCE EXPENSES**  
for the Year Ended August 31, 2016 (in dollars)

EXPENSES	Custodial	Maintenance	Utilities and Telecomm.	Expensed IMR, Modular Unit Relocations & Lease Payments	Facility Planning & Operations Administration	Unsupported Amortization & Other Expenses	Supported Capital & Debt Services	2016 TOTAL Operations and Maintenance	2015 TOTAL Operations and Maintenance
Uncertificated salaries and wages	\$ 27,310,488	\$ 12,599,326	\$ -	\$ -	\$ 6,478,885			\$ 46,388,699	\$ 49,331,870
Uncertificated benefits	\$ 8,205,508	\$ 5,273,878	\$ -	\$ -	\$ 2,056,281			\$ 15,535,667	\$ 13,764,711
Sub-total Remuneration	\$ 35,515,996	\$ 17,873,204	\$ -	\$ -	\$ 8,535,166			\$ 61,924,366	\$ 63,096,581
Supplies and services	\$ 2,704,335	\$ 8,968,197	\$ 714,465	\$ 7,348,132	\$ 1,571,864			\$ 21,306,993	\$ 18,803,105
Electricity			\$ 8,239,643					\$ 8,239,643	\$ 7,197,221
Natural gas/heating fuel			\$ 5,290,046					\$ 5,290,046	\$ 5,101,032
Sewer and water			\$ 2,119,615					\$ 2,119,615	\$ 1,999,691
Telecommunications			\$ 684,572					\$ 684,572	\$ 707,821
Insurance					\$ 2,170,593			\$ 2,170,593	\$ 2,288,734
ASAP maintenance & renewal payments							\$ 3,734,943	\$ 3,734,943	\$ 2,743,900
Amortization of tangible capital assets									
Supported							\$ 33,061,120	\$ 33,061,120	\$ 31,502,258
Unsupported						\$ 746,001		\$ 746,001	\$ 277,516
Total Amortization						\$ 746,001	\$ 33,061,120	\$ 33,807,121	\$ 31,779,774
Interest on capital debt									
Supported							\$ -	\$ -	\$ 17,188
Unsupported						\$ 420,532		\$ 420,532	\$ 375,442
Lease payments for facilities				\$ 5,084,823				\$ 5,084,823	\$ 5,244,783
Other interest charges						\$ 190,565		\$ 190,565	\$ 182,155
Losses on disposal of capital assets						\$ -		\$ -	\$ -
<b>TOTAL EXPENSES</b>	<b>\$ 38,220,331</b>	<b>\$ 26,841,401</b>	<b>\$ 17,048,341</b>	<b>\$ 12,432,955</b>	<b>\$ 12,277,623</b>	<b>\$ 1,357,098</b>	<b>\$ 36,796,063</b>	<b>\$ 144,973,812</b>	<b>\$ 139,537,427</b>
<b>SQUARE METRES</b>									
School buildings								1,078,604.0	1,069,695.0
Non school buildings								99,301.0	115,783.0

**Note:**

**Custodial:** All expenses related to activities undertaken to keep the school environment and maintenance shops clean and safe.

**Maintenance:** All expenses associated with the repair, replacement, enhancement and minor construction of buildings, grounds and equipment components. This includes regular and preventative maintenance undertaken to ensure components reach or exceed their life cycle and the repair of broken components. Maintenance expenses exclude operational costs related to expensed IMR & Modular Unit relocations, as they are reported on separately.

**Utilities & Telecommunications:** All expenses related to electricity, natural gas and other heating fuels, sewer and water and all forms of telecommunications.

**Expensed IMR & Modular Unit Relocation & Lease Pmts:** All operational expenses associated with non-capitalized Infrastructure Maintenance Renewal projects, modular unit (portable) relocation, and payments on leased facilities.

**Facility Planning & Operations Administration:** All expenses related to the administration of operations and maintenance including (but not limited to) contract administration, clerical functions, negotiations, supervision of employees & contractors, school facility planning & project 'administration', administration of joint-use agreements, and all expenses related to ensuring compliance with health and safety standards, codes and government regulations.

**Unsupported Amortization & Other Expenses:** All expenses related to unsupported capital assets amortization and interest on unsupported capital debt.

**Supported Capital & Debt Services:** All expenses related to supported capital assets amortization and interest on supported capital debt.

**SCHEDULE OF CASH, CASH EQUIVALENTS, AND PORTFOLIO INVESTMENTS**  
for the Year Ended August 31, 2016 (in dollars)

<u>Cash &amp; Cash Equivalents</u>	2016			2015
	Average Effective (Market) Yield	Cost	Amortized Cost	Amortized Cost
Cash		\$ -	\$ 286,929,625	\$ 239,064,306
Cash equivalents				
Government of Canada, direct and guaranteed	0.00%	-	-	-
Provincial, direct and guaranteed	0.00%	-	-	-
Corporate	0.00%	-	-	-
Municipal	0.00%	-	-	-
Pooled investment funds	0.00%	-	-	-
Other, including GIC's	0.00%	-	-	-
Total cash and cash equivalents	0.00%	\$ -	\$ 286,929,625	\$ 239,064,306

See Note 3 for additional detail.

<u>Portfolio Investments</u>	2016				2015
	Average Effective (Market) Yield	Cost	Fair Value	Balance	Balance
Long term deposits	0.00%	\$ -	\$ -	\$ -	\$ -
Guaranteed interest certificates	0.00%	-	-	-	-
Fixed income securities					
Government of Canada, direct and guaranteed	0.00%	\$ -	\$ -	\$ -	\$ -
Provincial, direct and guaranteed	0.00%	-	-	-	-
Municipal	0.00%	-	-	-	-
Corporate	0.00%	-	-	-	-
Pooled investment funds	0.00%	-	-	-	-
Total fixed income securities	0.00%	-	-	-	-
Equities					
Canadian	0.00%	\$ -	\$ -	\$ -	\$ -
Foreign	0.00%	-	-	-	-
Total equities	0.00%	-	-	-	-
Supplemental integrated pension plan assets	0.00%	\$ -	\$ -	\$ -	\$ -
Restricted investments	0.00%	-	-	-	-
Other (Specify)	0.00%	-	-	-	-
Other (Specify)	0.00%	-	-	-	-
Total portfolio investments	0.00%	\$ -	\$ -	\$ -	\$ -

The following represents the maturity structure for portfolio investments based on principal amount:

	2016	2015
Under 1 year	100.0%	100.0%
1 to 5 years	0.0%	0.0%
6 to 10 years	0.0%	0.0%
11 to 20 years	0.0%	0.0%
Over 20 years	0.0%	0.0%
	100.0%	100.0%

**SCHEDULE 6**School Jurisdiction Code: **3020**

**SCHEDULE OF CAPITAL ASSETS**  
**for the Year Ended August 31, 2016 (in dollars)**

<b>Tangible Capital Assets</b>	<b>2016</b>							<b>2015</b>
	<b>Land</b>	<b>Construction In Progress</b>	<b>Buildings</b>	<b>Equipment</b>	<b>Vehicles</b>	<b>Computer Hardware &amp; Software</b>	<b>Total</b>	<b>Total</b>
Estimated useful life			25-50 Years	5-10 Years	5-10 Years	3-5 Years		
<b>Historical cost</b>								
Beginning of year	\$ 837,590	\$ 21,900,914	\$ 1,193,691,738	\$ 122,923,137	\$ 3,160,543	\$ 85,840,363	\$ 1,428,354,285	\$ 1,383,132,397
Prior period adjustments	-	-	-	-	-	-	-	-
Additions	-	92,643,141	4,388,891	1,239,869	61,839	3,493,123	101,826,863	47,827,129
Transfers in (out)	-	(6,891,744)	6,891,744	142,966	(142,966)	-	-	-
Less disposals including write-offs	-	-	(1,771,078)	(68,910)	-	(48,699,026)	(50,539,014)	(2,605,241)
	\$ 837,590	\$ 107,652,311	\$ 1,203,201,295	\$ 124,237,062	\$ 3,079,416	\$ 40,634,460	\$ 1,479,642,134	\$ 1,428,354,285
<b>Accumulated amortization</b>								
Beginning of year	\$ -	\$ -	\$ 578,795,543	\$ 102,586,329	\$ 2,057,962	\$ 72,722,653	\$ 756,162,487	\$ 718,025,517
Prior period adjustments	-	-	-	-	-	-	-	-
Amortization	-	-	34,804,780	4,197,009	234,552	3,871,509	43,107,850	40,536,333
Other additions	-	-	-	-	-	-	-	-
Transfers in (out)	-	-	-	75,583	(75,583)	-	-	-
Less disposals including write-offs	-	-	(1,771,078)	(68,910)	-	(48,699,026)	(50,539,014)	(2,399,363)
	\$ -	\$ -	\$ 611,829,245	\$ 106,790,011	\$ 2,216,931	\$ 27,895,136	\$ 748,731,323	\$ 756,162,487
<b>Net Book Value at August 31, 2016</b>	<b>\$ 837,590</b>	<b>\$ 107,652,311</b>	<b>\$ 591,372,050</b>	<b>\$ 17,447,051</b>	<b>\$ 862,485</b>	<b>\$ 12,739,324</b>	<b>\$ 730,910,811</b>	
<b>Net Book Value at August 31, 2015</b>	<b>\$ 837,590</b>	<b>\$ 21,900,914</b>	<b>\$ 614,896,195</b>	<b>\$ 20,336,808</b>	<b>\$ 1,102,581</b>	<b>\$ 13,117,710</b>		<b>\$ 672,191,798</b>

	<b>2016</b>	<b>2015</b>
Total cost of assets under capital lease	\$ -	\$ -
Total amortization of assets under capital lease	\$ -	\$ -

The former Ritchie School Building and land was transferred to Greater North Central Francophone Education Region #2. The net book value of the property is \$0 with a historical cost of \$1,839,988 and accumulated amortization of \$1,839,988.

# SCHEDULE 7

## SCHEDULE OF REMUNERATION AND MONETARY INCENTIVES for the Year Ended August 31, 2016 (in dollars)

Board Members:	FTE	Remuneration	Benefits	Negotiated Allowances	Performance Bonuses	ERIP's / Other Paid	Other Accrued Unpaid Benefits (1)	Expenses
Chair: JANZ, MICHAEL	1.00	\$43,179	\$3,887	\$3,403			\$7,243	\$7,462
Other members								
ADAMS, SHERRY	1.00	\$30,547	\$6,096	\$3,403			\$3,513	\$4,411
CHUBB, ORVILLE	1.00	\$30,547	\$6,096	\$3,403			\$3,737	\$973
DRAPER, MICHELLE	1.00	\$38,134	\$6,394	\$3,403			\$3,616	\$6,254
GIBSON, KEN	1.00	\$30,547	\$6,096	\$3,403			\$3,503	\$1,020
IP, NATHAN	1.00	\$30,547	\$3,481	\$3,403			\$3,513	\$3,125
JOHNER, CHERYL	1.00	\$30,815	\$6,101	\$3,403			\$7,089	\$2,414
MARTIN, RAY	1.00	\$33,899	\$730	\$3,403			\$3,768	\$913
STIRLING, BRIDGET	0.90	\$27,778	\$6,309	\$3,079			\$1,171	\$2,792
HOFFMAN, SARAH	-	\$0	-\$220	\$0			\$0	\$0
	-	\$0	\$0	\$0			\$0	\$0
	-	\$0	\$0	\$0			\$0	\$0
	-	\$0	\$0	\$0			\$0	\$0
	-	\$0	\$0	\$0			\$0	\$0
<b>Subtotal</b>	<b>8.90</b>	<b>\$295,993</b>	<b>\$44,970</b>	<b>\$30,303</b>			<b>\$37,153</b>	<b>\$29,364</b>
ROBERTSON, DARREL, Superintendent	1.00	\$250,419	\$70,215	\$9,731	\$0	\$0	\$28,521	\$2,897
STODDARD, SANDRA, Secretary	1.00	\$195,728	\$32,794	\$3,875	\$0	\$0	\$35,643	\$4,220
LEMPOGO, JONAH, Treasurer	0.42	\$76,353	\$14,158	\$1,423	\$0	\$75,606	\$0	\$0
PROULX, MADONNA, Treasurer (Acting)	0.57	\$98,992	\$22,943	\$2,122	\$0	\$0	\$31,768	\$11,472
BURNSTAD, TODD, Treasurer	0.01	\$1,878	\$375	\$39	\$0	\$0	\$11,988	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0
Certificated teachers	4,694.39	\$470,223,576	\$111,148,259	\$1,372,565	\$0	\$12,000	\$795,430	
Non-certificated - other	3,134.19	\$184,539,465	\$45,962,800	\$6,104,714	\$0	\$201,002	\$5,614,768	
<b>TOTALS</b>	<b>7,840.48</b>	<b>\$655,682,404</b>	<b>\$157,296,514</b>	<b>\$7,524,772</b>	<b>\$0</b>	<b>\$288,608</b>	<b>\$6,555,271</b>	<b>\$47,953</b>

(1) Other Accrued Unpaid Benefits Include: Untaken vacation pay, Trustees' severance and Retirement Allowance

Bridget Stirling - Effective October 5, 2015

Jonah Lempogo - Resigned January 31, 2016

Madonna Proulx - Acting January 12, 2016 to August 29, 2016

Todd Burnstad - Effective August 29, 2016

Superintendent benefits include SIPP, 2015-16 SERP cash benefit, and ATRF contribution amounts



## 1. AUTHORITY AND PURPOSE

Edmonton School District No. 7 (the District) is empowered to provide public education through bylaws approved by its Board of Trustees and pursuant to the provisions of the *School Act*, Revised Statutes of Alberta 2000, Chapter S-3.

The District receives funding for instruction and support under the *Education Grants Regulation* (AR120/2008). The regulation allows for the setting of conditions and use of grant monies. The District is limited on certain funding allocations and administration expenses.

## 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

These financial statements have been prepared in accordance with the CPA Canadian public sector accounting standards (PSAS). The financial statements have, in management's opinion, been properly prepared within reasonable limits of materiality and within the framework of the accounting policies summarized below:

### (a) Basis of Consolidation

These financial statements reflect the assets, liabilities, revenues and expenses of the reporting entity, which is comprised of all controlled entities on a line-by-line basis.

Edmonton Public Schools Foundation (the "Foundation") was established in 2009 by the District for the purposes of fundraising. The Foundation was incorporated under the *Societies Act* of the Province of Alberta. The District controls the Foundation and as such it is consolidated in these financial statements.

Funds generated at the schools are included as assets, liabilities, revenue and expenses of the District when the accountability, control and ownership of these funds rest with the District and are under control of the school.

Interdepartmental and inter-organizational transactions and balances between consolidated entities are eliminated upon consolidation.

### (b) Cash and Cash Equivalents

Cash and cash equivalents include cash and investments that are readily convertible to known amounts of cash and that are subject to an insignificant risk of change in value. These short-term investments have a maturity of three months or less at acquisition.

### (c) Accounts receivable

Accounts receivable are shown net of allowance for doubtful accounts.

### (d) Tangible capital assets

Tangible capital assets acquired or constructed are recorded at cost, including amounts directly related to the acquisition, design, construction, development, or betterment of the asset. Cost also includes overhead directly attributable to construction as well as interest costs that are directly attributable to the acquisition or construction of the asset.

Donated tangible capital assets are recorded at their fair market value at the date of donation, except in circumstances where fair value cannot be reasonably determined, when they are then recognized at nominal value.

Work-in-progress is recorded as a transfer to the applicable asset class at substantial completion.

Buildings that are demolished or destroyed are written-off.

Tangible capital assets with costs in excess of \$5,000 are capitalized.



Commencing the following year of acquisition, amortization is recorded on a straight-line basis over the estimated useful lives of the assets using the following rates:

Buildings and site improvements	2.5% to 10%
Furniture and equipment	10%
Vehicles	10%
Computer equipment	20%

(e) Deferred Revenue

Deferred revenue includes contributions received for operations which have stipulations that meet the definition of a liability per *Public Sector Accounting Standards (PSAS) PS 3200*. These contributions are recognized by the District once it has met all eligibility criteria to receive the contributions. When stipulations are met, deferred revenue is recognized as revenue in the fiscal year in a manner consistent with the circumstances and evidence used to support the initial recognition of the contributions received as a liability.

Deferred revenue also includes contributions for capital expenditures, unexpended and expended:

- Unexpended Deferred Capital Revenue (UDCR) represent externally restricted supported capital funds provided for a specific capital purpose received or receivable by the District, but the related expenditure has not been made at year-end. These contributions must also have stipulations that meet the definition of a liability per *PS 3200* when expended.
- Expended Deferred Capital Revenue (EDCR) represent externally restricted supported capital funds that have been expended but have yet to be amortized over the useful life of the related capital asset. Amortization over the useful life of the related capital asset is due to certain stipulations related to the contributions that require the District to use the asset in a prescribed manner over the life of the associated asset.

(f) Employee Future Benefits

The District provides certain post-employment benefits including vested and non-vested benefits for certain employees pursuant to certain contracts and union agreements.

The District accrues its obligations and related costs including both vested and non-vested benefits under employee future benefit plans in the reporting period the benefits are earned by employees. Benefits include the non-registered Supplemental Executive Retirement Program (SERP), retirement allowances and non-vested sick leave. The future benefits cost is actuarially determined using the projected benefit method prorated on service and using management's best estimate of expected salary escalation, benefit usage, termination and retirement rates and mortality. The discount rate used to measure obligations is based on the cost of borrowing.

(g) Asset Retirement Obligations

The District recognizes liabilities for statutory, contractual or legal obligations associated with the retirement of tangible capital assets when those obligations result from the acquisition, construction, development or normal operation of the assets. The obligations are measured initially at fair value, determined using present value methodology, and the resulting costs are capitalized into the carrying amount of the related asset. In subsequent periods, the liability is adjusted for the accretion of discount and any changes in the amount or timing of the underlying future cash flows. The capitalized asset retirement cost is amortized on the same basis as the related asset and the discount accretion is included on the Statement of Operations. The District has included its estimated asset retirement obligation of \$1,060,658 (2015 - \$2,649,588) in the Statement of Financial Position as Other Liabilities. These obligations will be discharged in the future by funding through the Government of Alberta.



(h) Operating and Capital Reserves

Certain amounts are internally or externally restricted for future operating or capital purposes. Transfers to and from reserves are recorded when approved by the Board of Trustees. Capital reserves are restricted to capital purposes and may only be used for operating purposes with approval by the Minister of Education. Reserves are disclosed in the Schedule of Changes in Accumulated Surplus.

(i) Revenue Recognition

Revenues are recorded on an accrual basis. Instruction and support allocations are recognized in the year to which they relate. Fees for services related to courses and programs are recognized as revenue when such courses and programs are delivered.

Volunteers contribute a considerable number of hours per year to assist schools operated by the District in carrying out certain activities. Contributed services are not recognized in the financial statements due to the difficulty of determining the fair value and the fact that such assistance is generally not otherwise purchased.

*Eligibility criteria* are criteria that the District has to meet in order to receive certain contributions. *Stipulations* describe what the District must perform in order to keep the contributions.

Contributions without eligibility criteria or stipulations are recognized as revenue when the contributions are authorized by the transferring government or entity. Contributions with eligibility criteria but without stipulations are recognized as revenue when the contributions are authorized by the transferring government or entity and all eligibility criteria have been met.

Contributions with stipulations are recognized as revenue in the period the stipulations are met, except when and to the extent that the contributions give rise to an obligation that meets the definition of a liability in accordance with section *PS 3200*. Such liabilities are recorded as deferred revenue. The following items fall under this category:

- Non-capital contributions for specific purposes are recorded as deferred revenue and recognized as revenue in the year the stipulated related expenses are incurred;
- Unexpended Deferred Capital Revenue;
- Expended Deferred Capital Revenue.

(j) Pensions

The District and its staff participate in multi-employer defined benefit pension plans.

The District's certificated employees are required to contribute to the Alberta Teachers' Retirement Fund (ATRF). The plan's sponsor is the Government of Alberta. ATRF contributions by the Government of Alberta for current service are reflected as a part of education system costs and are formally recognized in the accounts of the District, even though under the terms of the *Teachers' Pension Plan Act*, the District has no legal obligation to pay these costs. The amount of current service contributions are recognized as "Government of Alberta" revenue and as "Certificated benefits" expense. The plan sponsor's current service costs for employees for the current year are \$56,333,899 (2015 - \$54,420,598). At August 31, 2015 the ATRF reported a surplus of \$779,716,000 (2014 - \$519,473,000 surplus).

The District and its uncertificated staff participate in the multi-employer Local Authorities Pension Plan. The service costs for employees for the current year of \$18,363,309 (2015 - \$17,651,788) are included in these statements and comprise the District costs of the employer contribution. At December 31, 2015, the Local Authorities Pension Plan reported a deficiency of \$923,416,000 (2014 - \$2,454,636,000).

The District and the Superintendent participate in a multi-employer registered Supplemental Integrated Pension Plan (SIPP). This plan is supplemental to the ATRF. Employers are solely responsible for contributions to the pension plan.



(k) Program Reporting

The Division's operations have been segmented as follows:

- **Instruction - ECS:** The provision of Early Childhood Services education instructional services that fall under the basic public education mandate.
- **Instruction - Grades 1 - 12:** The provision of education instructional services for grades 1 – 12 that fall under the basic public education mandate.
- **Plant Operations and Maintenance:** The operation and maintenance of all school buildings and maintenance shop facilities.
- **Transportation:** The provision of regular and special education bus services (to and from school), whether contracted or board operated, including transportation facility expenses.
- **Board & System Administration:** The provision of board governance and system-based / central office administration.
- **External Services:** All projects, activities, and services offered outside the public education mandate for ECS children and students in grades 1-12. Services offered beyond the mandate for public education must be self-supporting, and Alberta Education funding may not be utilized to support these programs.

The allocation of revenues and expenses are reported by program, source, and object on the Schedule of Program Operations. Respective instruction expenses include the cost of certificated teachers, non-certificated teaching assistants as well as a proportionate share of supplies & services, school administration & instruction support, and System Instructional Support.

(l) Trusts Under Administration

The District has property that has been transferred or assigned to it to be administered or directed by a trust agreement or statute. The District holds title to the property for the benefit of the beneficiary. Trusts under administration have been excluded from the financial reporting of the District. A summary of Trust balances is listed in Note 16.

(m) Financial Instruments

A contract establishing a financial instrument creates, at its inception, rights and obligations to receive or deliver economic benefits. The financial assets and financial liabilities portray these rights and obligations in the financial statements. The District recognizes a financial instrument when it becomes a party to a financial instrument contract.

Financial instruments consist of cash and cash equivalents, accounts receivable, accounts payable and accrued liabilities and debentures. All financial assets and liabilities are recorded at cost or amortized cost and the associated transaction costs are added to the carrying value of the item upon initial recognition. Gains or losses arising from the derecognition of financial instruments are recognized in the Statement of Operations. Impairment losses are also reported in the Statement of Operations.

Unless otherwise noted, it is management's opinion that the District is not exposed to significant credit and liquidity risks, or market risk, which includes currency, interest rate and other price risks. The District has a comprehensive risk management framework to monitor, evaluate and manage the principal risks assumed with financial instruments. The District does not use derivative financial instruments to manage risks.



(n) Measurement Uncertainty

The precise determination of many assets and liabilities is dependent on future events. As a result, the preparation of financial statements for a period involves the use of estimates and approximations, which have been made using careful judgment. Actual results could differ from those estimates. Significant areas requiring the use of management estimates relate to the potential impairment of assets, rates for amortization and estimated employee future benefits.

### 3. CASH AND CASH EQUIVALENTS

Cash and cash equivalents includes \$714,518 (2015 - \$775,837) for the Foundation.

### 4. ACCOUNTS RECEIVABLE

	2016			2015
	Gross Amount	Allowance for Doubtful Accounts	Net Realizable Value	Net Realizable Value
Alberta Education - Grants	\$ 120,250	\$ -	\$ 120,250	\$ -
Alberta Education - Capital	16,129,308	-	16,129,308	706,000
Alberta Education - ARO	1,060,658	-	1,060,658	2,649,588
Alberta Education - Other	413,731	-	413,731	446,539
Alberta Labour	40,482	-	40,482	-
Alberta Human Services	650	-	650	6,769
Alberta Infrastructure	27,005	-	27,005	65,174
Other Government of Alberta Ministries	2,238	-	2,238	190
Other Alberta school jurisdictions	256,234	-	256,234	192,803
Alberta Health Services	120,313	-	120,313	59,873
Post-secondary institutions	18,227	-	18,227	-
Federal government	2,268,349	-	2,268,349	1,349,960
First Nations	36,801	-	36,801	299,033
Other	3,424,594	(1,266,190)	2,158,404	1,521,019
Total	<u>\$ 23,918,840</u>	<u>\$ (1,266,190)</u>	<u>\$ 22,652,650</u>	<u>\$ 7,296,948</u>

### 5. BANK INDEBTEDNESS

The District has negotiated a line of credit in the amount of \$42 million Canadian dollars and \$200 thousand US dollars (the equivalent of \$265 thousand Canadian at August 31, 2016) that bears interest at prime less 0.50%. This line of credit is secured by a borrowing bylaw and a security agreement, covering all revenue of the District. There was no balance at August 31, 2016 or August 31, 2015.



## 6. ACCOUNTS PAYABLE AND ACCRUED LIABILITIES

	2016	2015
Alberta Education	\$ 3,369,282	\$ 4,144,847
Alberta Health Services	-	680
Post-secondary institutions	2,443	50,158
Alberta Local Authorities Pension Plan Corp	853,277	834,617
Federal government	9,619,601	9,140,352
Accrued vacation pay liability	6,555,271	6,069,274
Other salaries & benefit costs	13,259,063	6,454,729
Other trade payables and accrued liabilities	42,829,274	23,847,587
<b>Total</b>	<b>\$ 76,488,211</b>	<b>\$ 50,542,244</b>

## 7. DEFERRED REVENUE

SOURCE AND GRANT OR FUND TYPE	DEFERRED REVENUE as at Aug. 31, 2015	ADD: 2015/2016 Restricted Funds Received/ Receivable	DEDUCT: 2015/2016 Restricted Funds Expended (Paid / Payable)	DEFERRED REVENUE as at Aug. 31, 2016
<b>Unexpended deferred operating revenue</b>				
<b>Alberta Education:</b>				
Infrastructure Maintenance Renewal	\$ 7,957,118	\$ 15,650,399	\$ (14,240,656)	\$ 9,366,861
SuperNet Service	136,500	2,179,200	(2,315,700)	-
Other-WrapAround Project	206,515	-	-	206,515
Other Alberta Education (opening balance <\$100,000)	101,177	54,658	(101,177)	54,658
<b>Other Government of Alberta:</b>				
AHSCWF-Alberta Health and Alberta Education	5,084	30,000	(28,411)	6,673
CASS Dual Credit-Alberta Education, Enterprise and Advanced and Human Services	56,792	-	(56,792)	-
Community Helper Program -Alberta Health Services	9,614	56,380	(64,620)	1,374
Community Partnership Program-Alberta Human Services	21,886	45,000	(45,486)	21,400
Infrastructure Study Grant-Alberta Infrastructure	605,625	-	(352,810)	252,815
McKay Avenue Roof Repair-Alberta Culture and Tourism	130,286	125,734	(207,797)	48,223
Aboriginal Youth Driver-Alberta Indigenous Relations	-	6,000	(2,713)	3,287
CIP Grant-Legislative Assembly	-	7,019	-	7,019
<b>Other Deferred Revenue:</b>				
School Generated Funds-Fundraising	687,961	2,109,246	(2,120,357)	676,850
School Generated Funds-Donation	1,285,015	4,913,605	(4,701,019)	1,497,601
School Fees Received in Advance of School Year	1,625,662	3,396,216	(1,625,662)	3,396,216
EPSB Foundation	775,837	452,329	(513,648)	714,518
International Students	5,957,564	6,872,843	(7,063,621)	5,766,786
Non Resident Students	31,925	85	(31,925)	85
McKay Avenue Roof Repair Donation 2014-16	-	96,823	-	96,823
McKay Avenue Roof Repair from City of Edmonton	-	279,173	(279,173)	-
Metro Continuing Education	313,261	644,899	(316,328)	641,832
Reach	-	175,000	(175,000)	-
Trades Bootcamp	358,101	-	(172,119)	185,982
Other Deferred Revenue (opening balance <\$100,000)	108,804	72,698	(136,743)	44,759
<b>Total unexpended deferred operating revenue</b>	<b>\$20,374,727</b>	<b>\$37,167,307</b>	<b>(\$34,551,757)</b>	<b>\$22,990,277</b>
<b>Unexpended deferred capital revenue (Schedule 2)</b>	<b>47,058,333</b>	<b>84,928,496</b>	<b>(85,092,259)</b>	<b>46,894,570</b>
<b>Expended deferred capital revenue (Schedule 2)</b>	<b>594,131,400</b>	<b>93,595,154</b>	<b>(33,061,120)</b>	<b>654,665,434</b>
<b>Total</b>	<b>\$661,564,460</b>	<b>\$215,690,957</b>	<b>(\$152,705,136)</b>	<b>\$724,550,281</b>



## 8. EMPLOYEE FUTURE BENEFIT LIABILITIES

Employee future benefit liabilities consist of the following:

	2016	2015
Accumulating sick pay liability	\$ 4,898,800	\$ 5,343,500
Retirement allowances	4,880,800	4,665,400
Other employee future benefits	123,100	55,630
Total	<u>\$ 9,902,700</u>	<u>\$ 10,064,530</u>

## 9. OTHER LIABILITIES

Other liabilities consist of the following:

	2016	2015
Asset retirement obligation	\$ 1,060,658	\$ 2,649,588
Total	<u>\$ 1,060,658</u>	<u>\$ 2,649,588</u>

The following table summarizes the changes in asset retirement obligations (ARO):

	2016	2015
Balance beginning of year	\$ 2,649,588	\$ -
Additional obligations recognized	-	2,649,588
Obligations discharged	(1,588,930)	-
Total	<u>\$ 1,060,658</u>	<u>\$ 2,649,588</u>

The District has recorded two ARO's totaling \$1,060,658 (2015 - \$2,649,588) representing the estimated cost to remove hazardous materials from two schools.

The District has completed a review to determine if there is a liability for contaminated sites and none have been noted.

## 10. DEBT

	2016	2015
Unsupported debenture outstanding at August 31, 2016 has an interest rate of 3.06%. The term of the loan is 20 years payments made semi-annually.	\$ 13,583,639	\$ 14,163,106
Total	<u>\$ 13,583,639</u>	<u>\$ 14,163,106</u>



#### Unsupported Debenture – Alberta Capital Finance Authority

The District has a debenture outstanding in the amount of \$13,583,639. The debenture bears interest at 3.06% per annum and expires September 2033. The following is a summary of principal and interest payments on the related unsupported debenture:

	Principal	Interest	Total
2016-2017	\$ 597,315	\$ 410,721	\$ 1,008,037
2017-2018	615,716	392,322	\$ 1,008,038
2018-2019	634,682	373,356	\$ 1,008,038
2019-2020	654,233	353,805	\$ 1,008,038
2020-2021	674,385	333,653	\$ 1,008,038
2021 to maturity	10,407,308	2,193,164	12,600,472
Total	<u>\$ 13,583,639</u>	<u>\$ 4,057,021</u>	<u>\$ 17,640,661</u>

#### 11. PREPAID EXPENSES

Prepaid expenses consist of the following:

	2016	2015
Prepaid insurance	\$ 494,130	\$ 507,536
International Baccalaureate Fees	55,789	29,666
Building Lease Payments	431,840	434,683
Enterprise Systems	573,220	1,332,706
Professional Development	173,927	24,594
Other	61,060	205,740
Total	<u>\$ 1,789,966</u>	<u>\$ 2,534,925</u>

#### 12. OTHER NON-FINANCIAL ASSETS

Other non-financial assets consist of the following:

	2016	2015
Inventory - Primarily for Internal Use	\$ 2,768,039	\$ 3,957,781
Total	<u>\$ 2,768,039</u>	<u>\$ 3,957,781</u>



### 13. ACCUMULATED SURPLUS

The District's accumulated surplus is summarized as follows:

	2016	2015
Unrestricted surplus	\$ -	\$ -
Operating reserves	99,497,837	83,713,579
Accumulated surplus (deficit) from operations	99,497,837	83,713,579
Investment in tangible capital assets	62,904,234	64,672,775
Capital reserves	57,063,531	37,675,476
Accumulated surplus (deficit)	\$ 219,465,602	\$ 186,061,830

Included in accumulated surplus from operations are school generated funds to which the District has no claim. Adjusted accumulated surplus represents funds owned by the District.

	2016	2015
Accumulated surplus (deficit) from operations	\$ 99,497,837	\$ 83,713,579
Deduct: School generated funds included in accumulated surplus (Note 17)	2,933,533	2,959,090
Adjusted accumulated surplus (deficit) from operations <sup>(1)</sup>	\$ 96,564,304	\$ 80,754,489

(1) Accumulated surplus represents funding available for use by the District after deducting funds committed for use by the schools.

### 14. CONTRACTUAL OBLIGATIONS

	2016	2015
Building projects	\$ 173,842,776	\$ 81,168,889
Building leases	24,177,237	26,824,259
Service providers	5,153,731	8,251,280
Purchase Orders	4,390,887	1,169,995
Total	\$ 207,564,631	\$ 117,414,423

Estimated payment requirements for each of the next five years and thereafter are as follows:

	Building Projects	Building Leases	Service Providers	Purchase Orders
2016-2017	\$ 173,842,776	\$ 5,227,515	\$ 3,609,650	\$ 4,390,887
2017-2018	-	3,826,360	1,544,081	-
2018-2019	-	3,700,808	-	-
2019-2020	-	3,595,340	-	-
2020-2021	-	1,266,624	-	-
Thereafter	-	6,560,590	-	-
	\$ 173,842,776	\$ 24,177,237	\$ 5,153,731	\$ 4,390,887



## 15. CONTINGENT LIABILITIES

- a) The District is a member of Urban Schools Insurance Consortium (USIC), a licensed reciprocal insurance exchange under Alberta's *Insurance Act*, which facilitates the placement of property and liability insurance coverage for fourteen jurisdictions throughout the province of Alberta. Member contributions pay for premiums on insurance policies and self-insure a portion of each member's risk exposure. Premium rebates are received by the reciprocal from the insurer's favorable claims experience. Under the terms of its membership, each member could become liable for its proportionate share of any claim losses in excess of the funds held by the reciprocal. The District's share of the accumulated consortium funds as at August 31, 2016 was \$1,224,503 (2015 - \$1,363,499). This amount has not been recognized in the District's financial statements.
- b) The District was involved in various legal disputes as of August 31, 2016. While it is not possible to estimate the outcome of these disputes, management believes that there will be no significant adverse effects on the financial position of the District.

## 16. TRUSTS UNDER ADMINISTRATION

These balances represent assets that are held in trust. They are not recorded on the statements of the District.

	2016	2015
Deferred salary leave plan	\$ 1,897,518	\$ 1,836,783
Scholarship trusts	658,665	507,099
International Student Health Insurance	(7,527)	10,966
Total	<u>\$ 2,548,656</u>	<u>\$ 2,354,848</u>

## 17. SCHOOL GENERATED FUNDS

	2016	2015
School Generated Funds, Beginning of Year	\$ 4,932,066	\$ 4,816,854
Gross Receipts:		
Fees	13,099,858	13,062,270
Fundraising	1,990,541	1,717,851
Gifts and donations	4,913,605	5,461,873
Grants to schools	118,705	73,413
Other sales and services	5,373,087	5,003,340
Total gross receipts	25,495,796	25,318,747
Total Related Expenses and Uses of Funds	18,746,607	18,766,670
Total Direct Costs Including Cost of Goods Sold to Raise Funds	6,573,270	6,436,865
School Generated Funds, End of Year	<u>\$ 5,107,985</u>	<u>\$ 4,932,066</u>
Balance included in Deferred Revenue	\$ 2,174,451	\$ 1,972,976
Balance included in Accumulated Surplus (Operating Reserves)	\$ 2,933,534	\$ 2,959,090



## 18. RELATED PARTY TRANSACTIONS

All entities that are consolidated in the accounts of the Government of Alberta are related parties of school jurisdictions. These include government departments, health authorities, post-secondary institutions and other school jurisdictions in Alberta.

	Balances		Transactions	
	Financial Assets (at cost or net realizable value)	Liabilities (at amortized cost)	Revenues	Expenses
<b>Government of Alberta (GOA):</b>				
<b>Alberta Education</b>				
Accounts receivable / Accounts payable	\$ 16,299,430	\$ 3,369,282		
Prepaid expenses / Deferred operating revenue	-	10,262,689		
Unexpended deferred capital revenue		44,835,399		
Expended deferred capital revenue		656,254,364	33,061,120	
Grant revenue & expenses			909,735,989	
ATRF payments made on behalf of district			56,333,899	
Other revenues & expenses			181,043	53,815
<b>Other Alberta school jurisdictions</b>	256,234	-	930,877	232,015
<b>Alberta Culture &amp; Tourism</b>	-	48,223	77,143	11,659
<b>Alberta Health Services</b>	120,313	8,047	867,631	74,840
<b>Alberta Human Services</b>	650	21,400	2,473,229	44,722
<b>Alberta Labour</b>	40,482	-	-	-
<b>Post-secondary institutions</b>	18,227	2,443	640,983	124,409
<b>Alberta Infrastructure</b>	27,005	252,815	365,463	447
<b>Alberta Distance Learning Centre</b>	-	-	-	39,524
<b>Alberta Indigenous Relations</b>	-	3,287	-	-
<b>Legislative Assembly</b>	-	7,019	-	-
<b>Other GOA Ministries</b>	2,238	-	1,420	3,580
<b>Other:</b>				
Alberta Capital Financing Authority		13,583,639		428,571
Alberta Local Authorities Pension Plan Corp.	-	853,277	-	18,364,480
Other Related Parties	-	-	200	
Other Related Parties	-	-	-	-
<b>TOTAL 2015/2016</b>	<u>\$ 16,764,579</u>	<u>\$ 729,501,884</u>	<u>\$1,004,668,997</u>	<u>\$ 19,378,062</u>
<b>TOTAL 2014/2015</b>	<u>\$ 4,126,936</u>	<u>\$ 655,450,632</u>	<u>\$ 957,359,925</u>	<u>\$ 18,564,215</u>

## 19. ECONOMIC DEPENDENCE ON RELATED THIRD PARTY

The District's primary source of income is from the Government of Alberta. The District's ability to continue viable operations is dependent on this funding.



## **20. BUDGET AMOUNTS**

The budget was prepared by the school jurisdiction and approved by the Board of Trustees on June 23, 2015. It is presented for information purposes only and has not been audited.

## **21. COMPARATIVE FIGURES**

The comparative figures have been reclassified where necessary to conform to the 2015-2016 presentation.

**SCHEDULE 8**

School Jurisdiction Code: 3020

**UNAUDITED SCHEDULE OF FEE REVENUES**  
for the Year Ending August 31, 2016 (in dollars)

	Actual 2016	Actual 2015
<b>FEES</b>		
Transportation fees	\$11,768,592	\$11,721,020
Basic instruction supplies (text books, including lost or replacement fees, course materials)	\$2,660,750	\$2,353,581
Technology user fees	\$0	\$0
Alternative program fees	\$165,873	\$174,774
Fees for optional courses (band, art, etc.)	\$3,653,595	\$3,617,370
Fees for students from other boards	\$0	\$0
Tuition fees (international & out of province)	\$6,610,717	\$5,442,486
Kindergarten & preschool	\$551,826	\$551,756
Extracurricular fees (sports teams and clubs)	\$3,384,413	\$3,541,040
Field trips (related to curriculum)	\$5,525,978	\$5,608,564
Lunch supervision fees (Mandatory & Optional)	\$4,658,552	\$4,708,393
Locker rental; locks; student ID; uniforms; library, student union, and fitness fees	\$46,205	\$30,312
Other (describe)* Service Charge	\$57,093	\$36,841
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
Other (describe)*	\$0	\$0
<b>TOTAL FEES</b>	<b>\$39,083,594</b>	<b>\$37,786,137</b>

\*PLEASE DO NOT USE "SCHOOL GENERATED FUNDS" AS A CATEGORY

Please disclose amounts paid by parents of students that are recorded as "Other sales and services" or "Other revenue" (rather than fee revenue):	Actual 2016	Actual 2015
Cafeteria sales, hot lunch, milk programs	\$916,022	\$907,409
Special events, graduation, tickets	\$1,780,736	\$1,673,800
Student travel (international, recognition trips, non-curricular)	\$0	\$0
Sales or rentals of other supplies/services (clothing, agendas, yearbooks)	\$1,471,950	\$1,529,071
Adult education revenue	\$0	\$0
Child care & before and after school care	\$0	\$0
Other (describe) Library fines, book donations	\$292,481	\$347,534
Other (describe)	\$0	\$0
Other (describe)	\$0	\$0
<b>TOTAL</b>	<b>\$4,461,189</b>	<b>\$4,457,814</b>

UNAUDITED SCHEDULE OF DIFFERENTIAL FUNDING for the Year Ended August 31, 2016 (in dollars)					
	PROGRAM AREA				
	First Nations, Metis & Inuit (FNMI)	ECS Program Unit Funding (PUF)	English as a Second Language (ESL)	Inclusive Education	Small Schools by Necessity (Revenue only)
Funded Students in Program	8,123	1,820	16,581		
Federally Funded Students	47				
REVENUES					
Alberta Education allocated funding	\$ 9,177,988	\$ 37,547,103	\$ 19,754,970	\$ 63,225,184	\$ -
Other funding allocated by the board to the program	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL REVENUES</b>	<b>\$ 9,177,988</b>	<b>\$ 37,547,103</b>	<b>\$ 19,754,970</b>	<b>\$ 63,225,184</b>	<b>\$ -</b>
<b>EXPENSES (Not allocated from BASE, Transportation, or other funding)</b>					
Instructional certificated salaries & benefits	\$ 2,587,759	\$ 8,087,719	\$ 1,302,992	\$ 19,503,647	
Instructional non-certificated salaries & benefits	\$ 2,967,061	\$ 26,686,214	\$ 19,633,543	\$ 52,755,956	
<b>SUB TOTAL</b>	<b>\$ 5,554,820</b>	<b>\$ 34,773,933</b>	<b>\$ 20,936,535</b>	<b>\$ 72,259,603</b>	
Supplies, contracts and services	\$ 2,328,954	\$ 2,084,467	\$ 3,737,067	\$ 11,256,619	
Program planning, monitoring & evaluation	\$ -	\$ -	\$ -	\$ -	
Facilities (required specifically for program area)	\$ 1,109,005	\$ -	\$ -	\$ -	
Administration (administrative salaries & services)	\$ -	\$ -	\$ -	\$ -	
Other (Transportation)	\$ 886,894	\$ 688,703	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	
<b>TOTAL EXPENSES</b>	<b>\$ 9,879,673</b>	<b>\$ 37,547,103</b>	<b>\$ 24,673,602</b>	<b>\$ 83,516,222</b>	
<b>NET FUNDING SURPLUS (SHORTFALL)</b>	<b>\$ (701,685)</b>	<b>\$ -</b>	<b>\$ (4,918,632)</b>	<b>\$ (20,291,038)</b>	

**SCHEDULE 10**

UNAUDITED SCHEDULE OF CENTRAL ADMINISTRATION EXPENSES for the Year Ended August 31, 2016 (in dollars)								
EXPENSES	Allocated to Board & System Administration				Allocated to Other Programs			TOTAL
	Salaries & Benefits	Supplies & Services	Other	TOTAL	Salaries & Benefits	Supplies & Services	Other	
Office of the superintendent	\$ 715,046	\$ 61,896	\$ -	\$ 776,942	\$ -	\$ -	\$ -	\$ 776,942
Educational administration (excluding superintendent)	\$ 2,681,126	\$ 103,051	\$ -	\$ 2,784,177	\$ 2,665,125	\$ 65,951	\$ -	\$ 5,515,253
Business administration	\$ 3,797,005	\$ 2,776,145	\$ -	\$ 6,573,150	\$ 1,239,826	\$ 2,475,979	\$ 233,899	\$ 10,522,854
Board governance (Board of Trustees)	\$ 2,235,470	\$ 1,575,653	\$ -	\$ 3,811,123	\$ -	\$ -	\$ -	\$ 3,811,123
Information technology	\$ 3,505,184	\$ (1,096,069)	\$ -	\$ 2,409,115	\$ 9,680,354	\$ 3,714,707	\$ -	\$ 15,804,176
Human resources	\$ 6,264,178	\$ 703,892	\$ -	\$ 6,968,070	\$ 7,371,783	\$ 426,834	\$ -	\$ 14,766,687
Central purchasing, communications, marketing	\$ 3,240,779	\$ 460,352	\$ -	\$ 3,701,131	\$ 2,126,724	\$ 2,201,285	\$ 14,926	\$ 8,044,066
Payroll	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Administration - insurance			\$ 265,855	\$ 265,855			\$ 2,620,614	\$ 2,886,469
Administration - amortization			\$ 1,394,447	\$ 1,394,447			\$ 701,473	\$ 2,095,920
Administration - other (admin building, interest)			\$ -	\$ -			\$ -	\$ -
Building Operations/Facilities Services	\$ 1,526,386	\$ 773,758	\$ -	\$ 2,300,144	\$ 3,049,127	\$ 657,048	\$ -	\$ 6,006,319
District Support Services/Student Information	\$ 1,767,128	\$ 96,461	\$ -	\$ 1,863,589	\$ 627,423	\$ 26,990	\$ -	\$ 2,518,002
Archives & Museum/EPSP Foundation	\$ 634,858	\$ 145,716	\$ -	\$ 780,574	\$ 153,170	\$ 25,771	\$ 462	\$ 959,977
<b>TOTAL EXPENSES</b>	<b>\$ 26,367,160</b>	<b>\$ 5,600,855</b>	<b>\$ 1,660,302</b>	<b>\$ 33,628,317</b>	<b>\$ 26,913,532</b>	<b>\$ 9,594,565</b>	<b>\$ 3,571,374</b>	<b>\$ 73,707,788</b>

**DATE:** November 29, 2016

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Proposed Distribution of the 2015-2016 District Surplus

**ORIGINATOR:** Todd Burnstad, Chief Financial Officer

**RESOURCE STAFF:** Vanessa Crowell-Klettke, Lorne Parker

**REFERENCE:** N/A

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## ISSUE

Based on the audited financial statements for the year ended August 31, 2016, the District has a total of \$99.5 million accumulated operating reserve funds including a \$3 million school generated fund (SGF) surplus, which is internally restricted, leaving a net balance of \$96.5 million and an accumulated capital reserve balance of \$57.1 million.

### Operating Surplus Plan:

In conjunction with the 2016-2017 Spring Approved Budget, the Board approved the distribution of \$32.5 million of surplus funds to be used during the 2016-2017 school year. Based on the August 31, 2016, actual ending surplus balances at schools and central decision units, the actual amount of surplus released as part of the 2016-2017 Fall Revised Budget was \$60.8 million (Attachment I).

The budget allocation model at Edmonton Public Schools attempts to distribute the provincial funding we receive across all our schools and our central decision units in a fair and equitable manner with the ultimate goal of providing the best educational experience for our students. The allocation model is largely based on providing a per student allocation. While this approach is consistent across all our schools, depending on the number and composition of students, the ability for individual schools to budget their staffing needs as well as maintain their physical site varies throughout the District. The Equity Fund was established in 2014-2015 and has helped to bridge the gap inherent in the budget allocation system by providing resources through equity fund holdback dollars to schools that encounter emergent needs related to supporting the success of their students.

The District's operating surplus also provides a unique opportunity to be able to access funds to address some of the facility inequities that currently exist at our schools from both a technology and a facility infrastructure point of view (Attachment I, page 2).

The proposed technology plan includes the initial purchase of hardware and equipment to get schools to an equitable level. Once achieved it would evolve into providing core technology infrastructure (including servers, switches, Wi-Fi access points and internet service) on an on-going basis with required hardware or equipment being automatically updated on a regular evergreening schedule. Surplus funds would be required for year one and year two of this plan, following which adjustments would be made to the allocation model where these costs would be treated like a fixed utility annual operating expense

and would be reduced from the District's total annual budget prior to the school and central allocations being calculated.

The infrastructure investment framework will use operating surplus funds to address inequities around the physical state of the District's school sites. These expenses include repairs and maintenance costs, that do not qualify as capital expenditures, and that have typically been addressed through the schools own budget. As part of this initiative, an assessment of the school sites will be performed in order to prioritize the maintenance plan.

#### Capital Reserve Plan:

The capital reserve plan on Attachment III, outlines committed capital costs anticipated for 2016-2017 as well as a potential school technology initiative and a potential energy retrofit initiative.

For the remaining balance of the capital reserve funds, options are currently being discussed and will be brought forward to a future public board meeting for approval.

#### **RELATED FACTS**

Overall, the District believes that having reserve funds is a sound financial practice and helps to shield schools and students from unpredictable provincial funding and/or unforeseen events that could otherwise financially impact the District in any given year.

Although the net accumulated operating surplus balance of \$96.5 million is a large amount, it only represents 8.8 per cent of our total annual operating budget (\$1.1 Billion), and represents 17.5 operational days.

#### **RECOMMENDATION**

**That the proposed distribution of the 2015-2016 surplus be approved as follows:**

- 1. That the 2016-2017 planned use of surplus funds – Phase I totaling \$60.8 million released in conjunction with the 2016-2017 fall revised budget be approved .**
- 2. That the 2016-2017 planned use of surplus funds – Phase II (Attachment I, page 2) totaling \$6.8 million and the 2017-2018 planned use of surplus funds totaling \$16.5 million be approved.**
- 3. That the use of capital reserves in 2016-2017 and 2017-2018 for \$11.1 million and \$5 million be approved.**

#### **OPTIONS**

Based on the information provided in this report, the following options are considered most appropriate:

1. Support the recommended distribution of the operating and capital reserves as outlined in above recommendations 1 through 3.
2. Revise recommendations 1 through 3.

#### **CONSIDERATIONS and ANALYSIS**

The proposed technology and infrastructure planned use of surplus, requires access to surplus funds for both 2016-2017 as well as 2017-2018 in order to be fully implemented.

**NEXT STEPS**

Administration will proceed with the proposed distribution of accumulated operating surplus and capital reserve funds.

**ATTACHMENTS and APPENDICES**

ATTACHMENT I	Detailed Breakdown for the Budgeted Utilization of Accumulated Surplus from Operations for the year ended August 31, 2017
ATTACHMENT II	2016-2017 Central Initiatives to Support Schools – Notes
ATTACHMENT III	Capital Reserve Plan

TB:ja

**EPSB**  
**Accumulated Operating Surplus Plan**  
**2016-2019**

ATTACHMENT I

	Amount	Total Amount
<b>Accumulated operating surplus at September 1, 2015</b> (excluding SGF)		\$ 80,754,489
<b>Operating surplus for the year ending August 31, 2016</b>		15,809,815
<b>Accumulated operating surplus at September 1, 2016</b> (excluding SGF)		96,564,304
 <b>2016-2017 Planned use of surplus funds - Phase I:</b>		
<b>Surplus funds released in the 2016-2017 Fall Budget:</b>		
A School surpluses (up to 3%)	12,513,001	
B Increase in student allocations (ELL & Severe Special Needs)	9,604,595	
C Equity fund (increase over Spring Budget allocation, to bring total to \$9.6M)	5,556,232	
D Placeholder for staffing agreements	2,557,833	
E Student Transportation (access to restricted reserve)	3,050,000	
F School waste management initiative	1,000,000	
G New School start up/establishment costs for 11 for 2017 & top up for 3 recently opened		
11 x \$750,000	8,250,000	
3 x \$150,000	450,000	
H Central initiatives to support schools - Central access to surplus:		
<u>Supports for Schools</u> - Funds to support central services to schools in the areas of: curriculum, career pathways, literacy, numeracy, English language learners, student assessment, data analysis, FNMI, resources, mental health and other areas of need.	8,865,445	
<u>District Business Systems and School Support Applications</u> - Funds to support the implementation customization and/or maintenance of business systems and school applications including E-Biz, Archibus, PeopleSoft, Symphony, QuickBooks, FOIP and PowerSchool.	3,212,814	
<u>Strategic Planning and Administration</u> - Funds to support the data population and completion of the District Dashboard, the review and alignment of administrative regulations with the new Education Act, the development of District level strategic partnerships and the creation of a structure for principal readiness.	2,179,170	
<u>Facilities and Operations</u> - Funds to support school building improvements, facility assessments for schools involved with Space For Students in Mature Communities initiatives and the continuation of a fibre network connection to allow back up internet in the event of a service disruption.	2,070,000	
<u>Supports for the Establishment of New Schools and Programming</u> - Funds to support the staffing, communications, visual identity, space, and programming needs for new schools and expanding programs.	1,442,925	
<b>Subtotal surplus funds released in the 2016-2017 Fall Budget:</b>	60,752,015	(60,752,015)
<b>Subtotal accumulated operating surplus balance</b>		35,812,289

**EPSB**  
**Accumulated Operating Surplus Plan**  
**2016-2019**

**2016-2017 Planned use of surplus funds - Phase II:**

	Amount	Total Amount
1 School Technologies - Year 1 - baseline to equalize schools (Instructional display boards & other non capital items, total \$2.7M over 2 years)	1,350,000	
2 Network Switch Infrastructure - Year 1 - (establishment of a 7 year evergreen model)	1,375,201	
3 Consultant review of landline telephone services in the District	100,000	
4 Infrastructure Investment Framework - Year 1	4,000,000	
	<u>6,825,201</u>	(6,825,201)
5 <b>Plus:</b>		
Schools projected ending 2016-2017 surplus balance (up to 3%)	11,500,000	
Central projected ending 2016-2017 surplus balance	10,000,000	
	<u>21,500,000</u>	21,500,000
<b>Total forecasted accumulated operating surplus at September 1, 2017</b>		<u><b>50,487,088</b></u>

**2017-2018 Planned use of surplus funds:**

6 Maintain increase to student allocation levels (rolled out in 2016-2017)	6,000,000	
7 School Technologies - Year 2 - baseline to equalize schools (Instructional display boards & other non capital items, total \$2.7M over 2 years)	1,350,000	
8 Core Technology Enterprise Management	5,000,000	
9 Infrastructure Investment Framework - Year 2	4,100,000	
	<u>16,450,000</u>	(16,450,000)

**Targeted Reserve funds (For 2017-2018, 2018-2019 and beyond)**

10 <b>Carry forward minimum reserve target</b>	20,000,000	(20,000,000)
11 Equity fund - \$2M minimum balance per year	6,000,000	
12 Transportation (restricted reserve)	1,300,000	
13 Enterprise systems	3,500,000	
14 Property Management	1,100,000	
15 Infrastructure Investment Framework - year 3	2,137,088	
	<u>14,037,088</u>	(14,037,088)
		<u><b>\$ -</b></u>

**EPSB**  
**Accumulated Operating Surplus Plan**  
**2016-2019**

Notes: **Surplus Funds Released as part of the 2016-2017 Fall Budget:**

- A School surpluses up to 3%: Schools were allowed to carryforward a surplus balance of up to the 3% of their prior year fall budget. Any surplus amount that exceeded the 3% carryforward threshold was added to the Equity Fund. The amount shown as being released includes the repayment of school deficits of \$334,914 from the 2015-2016 school year. Metro Continuing Education was also allowed to carry forward \$519,000 to address outstanding relocation/renovation costs associated with their site relocation in 2015-2016.
- B Increase in student allocations (ELL & Severe Special Needs): In efforts to support the District's most vulnerable students, for the fall budget, student allocation rates for English Language Learners (ELL) was adjusted where students in Division I who previously only received a level 1 allocation, will now receive level 3. The level 3 allocation was then also increased by 5% over the 2016-2017 Spring Budget. In addition, students identified as having severe special needs (level 7 and 8) received a 10% allocation increase over the 2016-2017 Spring Budget.
- C Equity fund: In the spring an allocation of \$4 Million was established. For the fall, any school surplus balances in excess of the 3% carryforward threshold was added to the Equity Fund for 2016-2017. The Equity Fund was established by the Superintendent in 2014-2015 to enhance opportunities for all schools in the District and to support the District's Four Cornerstone Values: Collaboration, Accountability, Integrity, and Equity. This fund will support school catchment work and address individual school emergent circumstances.
- D Placeholder for staffing agreements: The support staff agreement has been unsettled since September 2015 and the exempt staff agreement ended in August 2016. Although the custodial staff collective agreement was settled in the spring of 2016, the unit cost figures used for the 2016-2017 budget did not include any increase in compensation. As such this request for surplus funds will be retained centrally and will be used to offset any staff contracts that are settled and/or paid in 2016-2017. EPSB assumes that any compensation adjustment related to the teachers agreement (which also expired in August 2016) will be fully funded by the Province and as such, no potential impact has been factored into the 2016-2017 budget.
- E Student Transportation: The access to surplus request is to offset the anticipated additional costs associated with an increase in ridership of approximately 800 yellow bus riders for 2016-2017.
- F School waste management initiative: In the past, schools were individually responsible for arranging, managing and budgeting the waste removal services at their site. Starting in September 2016, this service will be consolidated and managed by the Facilities Services decision unit, this will result in a decrease of over 2,500 invoices annually and will result in an overall cost savings and consistency of services provided. This initiative will be funded through surplus operating funds for 2016-2017. For subsequent years this will be added to our utility costs and will be funded through PO&M dollars.
- G Start up/establishment costs for new schools: In 2015-2016 an allocation of \$600K was provided to each of the three new schools scheduled to open in September 2016. This allocation covers staff costs (including principals) required to start preparing for the school opening six months prior. In addition, there are other expenses that are not funded by the Province. Based on the schools that recently opened, the actual amount of funds required is \$750K, as such, a top up allocation of \$150K is required for the recently opened schools and \$750K will be required for each of the 11 new schools anticipated to open in September 2017.
- H Central initiatives to support schools: Starting in 2015-2016, where schools were allowed access of up to 3% of their surplus, Central leaders decided to pool their unrestricted operating surplus funds and using a collaborative approach, prioritize initiatives that directly support the District's Strategic Plan. This process has continued for 2016-2017 and details of the planned initiatives have been included on Attachment II.

**EPSB**  
**Accumulated Operating Surplus Plan**  
**2016-2019**

**Notes: 2016-2017 Planned use of surplus funds - Phase II:**

- 1 School Technologies - Year 1 - targeted funding totalling \$2.7M over 2 years. These funds will be used to bring all instructional spaces to an equitable baseline related to interactive display technologies. The funding includes the acquisition and installation of 650 new interactive display technologies (which individually fall below our asset capitalization policy).
- 2 Network Switch Infrastructure - Year 1 - Currently, schools are responsible for the cost of core switching technology at their respective sites. Schools are charged monthly by District Technology for service and support of this core infrastructure. In a new enterprise management model, maintenance, management and evergreening of core switching technology will become the responsibility of District Technology. The replacement of end of life switches in all schools will take place over a three year period, after which a seven year evergreening plan will be in place across the District. Schools will no longer be responsible for budgeting for the maintenance and replacement of their core switching technology.
- 3 Consultant review of landline telephone services in the District - A plan to reduce the cost of landline telephone services was implemented in 2011, resulting in a reduction of EPS telephone lines from 1400 to 350, and annual savings of \$375K. In 2016-2017, District Technology and Facilities Services will engage the services of a consultant to assist with a full review of our landline telephone services, including recommendations on an 10 year enterprise plan.
- 4 Infrastructure Investment Framework - Year 1 - Investment in District infrastructure will narrow the equity gap between schools. Items such as interior paint, furniture and equipment, minor instructional upgrades, gym floors, air ducts, interior and exterior entrance areas, and general office areas will be addressed. Additional funding for 21st Century student-centred school design and school facility assessments is also included.
- 5 School & Central surplus carryforward - In compliance with the Administrative Regulation CVB.AR – *Guidelines for Carry Forward of Funds for Central and School Decision Units* and based on historical trends, it is reasonable to assume that both schools and central decision units will not expend the full amount of the funds that were allocated to them in 2016-2017. These funds will then be available to redistribute in 2017-2018.

**Notes: 2017-2018 Planned use of surplus funds:**

- 6 Maintain increase to student allocation levels (rolled out in 2016-2017) - In conjunction with the 2016-2017 fall budget, changes were made to the student allocation rates increasing the amount allocated for English Language Learner (ELL) students as well as students with severe special needs. Unless there are any increases in provincial funding for 2017-2018, in order to maintain these higher student allocation levels, additional funds will be required from the operating surplus.
- 7 School Technologies - Year 2 - targeted funding totalling \$2.7M over 2 years. These funds will be used to bring all instructional spaces to an equitable baseline related to interactive display technologies. The funding includes the acquisition and installation of 650 new interactive display technologies (which individually fall below our capitalization policy).
- 8 Core Technology Enterprise Management - currently, schools are responsible for the cost of core technology infrastructure at their respective sites. Schools are charged monthly by District Technology for service and support of this core infrastructure, which includes servers, switches, wi-fi access points and Internet service. In a new enterprise management model, maintenance, management and evergreening of core technology infrastructure will become the responsibility of District Technology. Schools will no longer be responsible for budgeting for the maintenance and replacement of their core technology infrastructure. Following 2017-2018, funds to sustain this model will be provided out of the District's operating budget as a fixed annual cost.
- 9 Infrastructure Investment Framework - Year 2 - Investment in District infrastructure will continue in an effort to narrow the equity gap between schools. Items such as interior paint, furniture and equipment, minor instructional upgrades, gym floors, air ducts, interior and exterior entrance areas, and general office areas will continue to be addressed.

**EPSB**  
**Accumulated Operating Surplus Plan**  
**2016-2019**

Notes: **Targeted: Sustainability/Reserve Funds (for 2017-2018, 2018-2019 and beyond)\***

- \* Given the dependence and uncertainty around Provincial funding for EPSB, it is difficult to project the District's accumulated surplus position beyond one year. As such, administration had identified the below list of targeted reserve funds required for future years.

10 Carry forward minimum reserve target: To be financially responsible and prudent the District is targeting to maintain a minimum reserve balance of \$20 Million.

11 Equity fund: This reserve fund is used to guarantee a minimum balance of \$2 Million per year for the 2017-2018 through 2019-2020 school years. The Equity Fund was established by the Superintendent in 2014-2015 to enhance opportunities for all schools in the District and to support the District's Four Cornerstone Values: Collaboration, Accountability, Integrity, and Equity. This fund will support school catchment work and address individual school emergent circumstances.

12 Transportation: The transportation surplus is restricted and is to be used exclusively to stabilize transportation fees.

13 Enterprise systems: These resources would be used for the purchase, installation, and upgrade of key enterprise systems, e.g., PeopleSoft HR, PowerSchool, Archibus, Intranet, etc. Although the E-Biz project went live in October 2015, to maximize the systems capabilities, several other systems now need to be updated (e.g. PeopleSoft HR, Budget, etc). In addition, the District has also identified the need to move towards an electronic recruiting application process. The governance of these resources would be addressed through the establishment of an Information Technology Council.

14 Property management: *(Closed buildings, non-instructional spaces and operational spaces with district tenants)* - Under the Infrastructure Investment Framework, Property Management reserves will be used for lifecycle needs on our closed school buildings and buildings used for central services' DUs (e.g., Centre for Education, Distribution Centre, etc.). This fund would cover major costs such as boilers and roofs that cannot be paid with IMR dollars.

15 Infrastructure Investment Framework - Year 3 - Investment in District infrastructure will continue in an effort to narrow the equity gap between schools. Items such as interior paint, furniture and equipment, minor instructional upgrades, gym floors, air ducts, interior and exterior entrance areas, and general office areas will continue to be addressed.

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

ATTACHMENT II

Initiative Name		Description	Funding Required For 2016-2017
<b>Supports for Schools</b>			
1	Evidence Based Decision Making	Supporting the development and roll out (training of school staff) of the internal dashboard; supporting catchment strategic planning through the use of data analysis protocols - based on achievement and survey data. Working with provincial achievement data to make it more actionable for schools and training staff to use the data (and align gaps with research to identify strategies for closing the gaps). Support high school department heads in using diploma exam data to improve teaching and learning. Build capacity in evidence-based decision making and assisting schools in data analysis.	275,000
2	Research Team - creating a culture of research/evidence based decision making	Supporting all district priorities through a foundation of research, evidence/research based decision making, best practices and evaluation of projects.	253,206
3	District-wide Focus on Reading (DFR) Elementary and Secondary Development	1.0 FTE secondary consultant position and funds to support secondary development work (supply teacher coverage, admin support, etc.); supply teacher coverage for 24 lead teachers from the DFR Cohort Schools (K-12).	238,977
4	Career Pathways	Ongoing work related to Phase 2 of Career Pathways as it expands across schools and division levels. Staff to support the development curriculum resources to support the implementation of the CTF and CTS courses and build teacher capacity in the integration of Career Pathways in CTF and CTS.	1,147,748
5	District assessments and assessment regulations	Supporting ongoing work around the MIPI and HLAT writing tests and ongoing support for matters related to GKB.AR as well as other District work – i.e., District-wide Focus on Reading, Gifted and Talented, Career Pathways. Build capacity in evidence-based decision making and assisting schools in data analysis.	225,000
6	Intercultural and Assessment Support for ELL and Newcomers	To Increase supports to schools to meet needs of english language learners and newcomers. Increase intercultural staff by 4 to support the following languages - Arabic, Somali and East Indian languages. Increase teacher consultant staff ( 2 ESL consultants and 1 Reading Specialist) to support assessment requests.	752,346
7	Mobile Mental Health Transition Team	Create a mobile mental health team.	376,000
8	Math/Numeracy Support	Increase from 1.0 to 4.0 FTE Math/Numeracy consultants to ensure each leadership group has an assigned Math/Numeracy consultant.	367,719
9	Locally Developed Courses (LDC) Management and Development	1.0 FTE teacher consultant, 0.2 admin support and funds for teacher supply coverage for the review, management and development of LDCs.	156,947
10	Diversity	To increase support staff by 0.5 FTE.	30,460
11	2017 Summer Institutes	Continuation of the Summer Institutes initiative that commenced in 2016.	325,000
12	Mental Health Capacity Building	Enhance training for Comprehensive School Contact in support of student mental health.	85,930
13	Early Years Strategy - Support students entering Grade 1 at risk for literacy and numeracy success	The Language Literacy Pilot in 2015-2016 developed a program prototype to build teacher capacity and support children entering Grade 1 who are identified at-risk for literacy difficulties and/or those who were identified as having speech, language or communication needs. For 2016-2017 professional learning to support teachers to use the prototype to support children at risk in grade 1.	100,000
14	RDS Resource Strategy Implementation	1.0 FTE teacher consultant and funds to support implementation of the RDS Resource Strategy.	150,856
15	Commit to Kids	District-initiated program to identify and prevent situations where students may be at risk of sexual abuse.	30,000
16	Psychologist and Academic Assessment	Used to obtain external contracts for specialized assessment. This initiative started in 2015-2016 and is continuing to be required for 2016-2017.	200,000

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

17	My Blueprint E. Portfolio	Support the implementation of myBlueprint Education Planner tool across the District. The yearly cost of using the system across the District is currently \$91,380 and includes the following: All About Me Portfolio K-6; Education Planner 7-12 (Alberta Edition); Data Services; (PowerSchool API, SSO, Staff Portal) Training, Proactive Support and Dedicated Service; Resource Centre, Lesson Plans, Tutorial Videos; Complimentary Upgrades to New Versions; Setup, Maintenance, Secure Canadian Hosting; French Editions (K-12).	91,380
18	Research Supervisor	Support and coordinate the need for research based practices and evaluation of the effectiveness strategies and approaches used in district schools. In addition, building central staff capacity by the development of protocols and practices for evaluation, data analysis and reporting.	130,000
19	2 FNMI Consultants	Increased demand and awareness of the FNMI achievement gap. 2 consultants are needed to support FNMI in each of the leadership groups.	260,000
20	Comprehensive School Health Coordinator	Continuity in shaping our work in Comprehensive School Health, and is the lead consultant for Mental Health First Aid and Mental Health Literacy Project. Act as Project Lead for the creation of a Mental Health Framework.	115,480
21	Early Years Expansion	District level supports for schools participating in phase two of Early years expansion.	121,500
22	Data Analyst	This additional support in the area of data analysis will support to build capacity of central and school staff. The goal is to develop knowledge, skills and expertise by using term definite position until internal capacity is built.	130,000
23	Building Capacity in Provincial Curriculum Implementation	Consultant support for provincial curriculum implementation and support for 7 subject areas.	1,570,185
24	Building Capacity in Math and Numeracy	Funding for key external presenters to support mathematics areas of need and for additional consultant support targetting bilingual and French immersion math interventions, resource development and professional learning support.	140,274
25	Building Capacity in Literacy Practices and Interventions	A range of supports to build District capacity in literacy classroom practices, intervention supports and leadership.	1,591,437
<b>Subtotal Supports for Schools</b>			<b>\$ 8,865,445</b>

**District Business Systems and School Support Applications**

26	Supporting Students and Teachers Through Digital Reporting	Implementation and maintainance of the new system (IPP, ELL, MMP, ISBP).	140,000
27	Next Phase of E-Biz - Business intelligence, analytical and reporting system	Finance has implemented a very robust enterprise transactional system (with standard reports) that has moved the District into the 21st century. However there is still a high demand and need to enhance reporting for schools, district leaders, and external stakeholders. The District needs to be more responsive and nimble than ever before as demands for analytical and financial reports from stakeholders has increased exponentially. An enterprise reporting and business analytical application was considered at the beginning of the E-Biz project. However, due to budget constraints the implementation was postponed and to be considered in a future roadmap. The business intelligence enterprise sytem will deliver a full range of capabilites including interactive dashboards, ad hoc inquiries, intergrated systems mgmt, enterprise and financial reporting, scorecard and strategy management, etc.	1,275,000
28	Maintenance of online training system (ERO)	A district-wide communication, registration and tracking software to manage professional learning of staff and talent management.	90,000

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

29	Development of a business case for the future direction and enhancement of PeopleSoft/HR technology infrastructure	PeopleSoft (as it is currently implemented) does not support the needs of the District relating to human resources data, functionality and the ability to implement a comprehensive human resources/talent management strategy. It does not effectively support interfaces with other District systems (e.g., E-Biz, business intelligence, etc.). This project would build on past work to develop a specific plan for the future direction of PeopleSoft and other HR technology requirements necessary to support current and future District needs. One outcome of this work is to develop a roadmap that will identify necessary enhancements to HR infrastructure and move forward on defined initiatives (e.g. online applications, timesheets, etc.).	275,000
30	Development and implementation of an effective and consistent performance management system	Our current performance management practices are inconsistent across staff groups and not well defined for some staff groups. Additionally, they do not support our culture of collaboration, accountability and learning. The objective of this work is to define a consistent district performance management process, supported by automated workflow for implementation in 2017-2018.	250,000
31	District Intranet	Ongoing work related to the build phase of the District Intranet, including: contract support to assist with the review and updating of documents and 1.0 consultant to convert existing curriculum, literacy and numeracy content (information, resources, etc.) into new District intranet structure.	607,814
32	Support of new centralized library system	This implementation commenced in 2015-2016. For 2016-2017 the required number of FTE's will be reduced from 2 to 1 to support the new centralized system.	60,000
33	Finance/ITS - Site Asset Mgmt System (SAMS)	Upgrade and enhance current version. Improve reporting, data entry, and editing features (current version is somewhat cumbersome). Improve and expedite asset management for new schools and/or transfers between schools. Also assists with insurance claims, disaster recovery, and risk management. Last upgraded approx. 10 yrs ago.	10,000
34	International Student Information system	Implementation support for the new International Student Information System that allow for online applications and online payments. This system interfaces with power school.	50,000
35	Provincial Power School Core upgrade	The District's cost shared portion of a provincial upgrade to Power School that will enable the District to properly "hide" or bury the legal name and surface the preferred name when this is the name that has been requested by the family (ie. transgendered student). This will enable schools to meet family requests in all circumstances where a preferred name is being requested by the family.	50,000
36	Quick Books Upgrade	The current version of Quick books (used by all the schools for recording SGF transactions) is outdated and is no longer compatible with new versions of Windows. In anticipation of the Province requiring additional reporting around school fees, The current Quickbook Chart of Accounts (COA) needs to be redesigned.	30,000
37	FOIP Software upgrade	Software to support the electronic sorting of emails related to a FOIP request. This software would create efficiencies and also improve the integrity of our process through the lens of accountability and transparency.	25,000
38	District Mass Messaging System	This project was initiated at a discussion level in 2015-2016. It involves looking at a district mass messaging system to send out alerts, messages etc. to staff, students and parents using email, phone and SMS	350,000
<b>Subtotal District Business Systems and School Support Applications</b>			<b>\$ 3,212,814</b>

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

**Strategic Planning and Administration**

39	Dashboard - Priorities Two and Three	Funding to support taking the development and implementation of the dashboard through to completion. For 2016-2017 there will need to be district work done for the building and data populating of the dashboard in relationship to priorities 2 and 3. The funding committed reflects dollars to support working with an external vendor. These dollars do not reflect the human resources drawn out of central decision units.	750,000
40	Strategic Partnership	Staffing positions to support the development of district level strategic partnerships. These positions would help in the development and implementation of a strategic approach to key areas of partnership that support Career Pathways, community connections (including Dual Credit), relationships with post secondaries, key industry partnerships, establishment and retaining of a District work place, mentoring and career data bank, school based wrap-around models, the role of community in replacement school initiatives and strategic community connections that support the Strategic Plan (such as literacy, diversity, mental health and early intervention).	400,000
41	Onboarding	Development and implementation of a comprehensive onboarding process for new and transitioning staff. This will be fundamental in supporting success as individuals move into new roles.	75,000
42	HR Administrative Regulations	Update and implement HR administrative regulations to align with new HR Framework and Education Act.	125,000
43	Principal Readiness	Create a process, structure, curriculum design and delivery to build a pool of principal talent to meet the upcoming district need for new principals and assistant principals.	300,000
44	Administration Regulation Review	With the adjustment/delay of Alberta Education's enactment of the new Education Act the work will carry forward into the 2016-2017 school year.	126,000
45	Research & Innovation - Data Analyst	This position was intended to support the District's capacity to use the Dashboard as a tool within an evidence-based culture. The Internal Dashboard launched August 2016. This position was not filled prior to the Dashboard being live and accessible to staff. This work to build capacity around the analysis of our data using the Dashboard as a single point of access to the data will be a key strategy for 2016-2017.	150,000
46	Strategic Plan Reporting Cycle	Hire a staff member to work with Central D.U.s, Assistant Superintendents and schools in support of the Strategic Plan Board Reports. This support would reach across all phases of the report development - data analysis, development of the report, writing and formatting of the document and preparation of the presentation for Public Board meeting. As this is the first year of this reporting process this position would promote the building staff capacity around evidence-based reporting and result in the development of a process frame and supporting materials that would be foundational to the approach to reporting on the go forward.	130,000
47	Fund Development Support One Year Position	The EPSB Foundation has made strategic decisions and created plans to increase the amount of donations given to support Full-Day Kindergarten and to raise awareness of the great things happening in our District. In order to get these plans on the ground in a timely and efficient way, we need additional support to develop our website/facebook/newsletters and to increase our social media presence. We are looking for someone to help create our event planning, employee campaign and stewardship frameworks. This would be a full time, one year term.	93,170
48	Student Senate	.25 teacher leader to support the ongoing operations of the Student Senate. There was originally an approved total budget of \$26,000 to support this work. In the first few weeks of operationalizing the Student Senate it has become evident that this initiative requires significant more time to organize, implement and support. There have also been some unanticipated costs associated with the running of the Student Senate, such as costs to cover their group photo for the District website.	30,000
<b>Subtotal Strategic Planning and Administration</b>			<b>\$ 2,179,170</b>

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

**Facilities and Operations**

49	Facilities: Assessments, Building Improvements for Schools and Property Management	Facility assessments for schools involved with Space For Students in Mature Communities initiatives. Infrastructure has received direction to complete similar assessments across the District. <i>NOTE: in order for this expense to be funded from capital reserves, all the work identified in the report must be completed and must qualify as an eligible capital expense.</i>	\$	1,650,000
50	District Information Security	Funds to support the hiring of a third member to the District Information Security team. Currently the team does not have the capacity to fully utilize the equipment and software the District has invested in this work. This leaves gaps or vulnerabilities in our ability to monitor the safety and well being of our students and staff.		65,000
51	Roof Repair/New Vehicle	This capital purchase was not undertaken. For the 2016-2017 year 2 cube vans and a fork lift are required.		175,000
52	Commerical Copier	A production copier was purchased in 2015-2016, a second one is required for 2016-2017.		100,000
53	Fibre connection to City of Edmonton	In 2015-2016, District Technology budgeted for a fibre network connection to the City of Edmonton via a trench from the CFE to the LRT line (where the City has fibre network buried). Connecting to this network will provide some level of redundancy to the District in the event that Shaw Internet Service is disrupted, allowing the District to continue to function with a core level of Internet access. However, delays in the build has resulted in it not being complete by August 2016 year end.		80,000
<b>Subtotal Facilities and Operations</b>			<b>\$</b>	<b>2,070,000</b>

**Supports for the Establishment of New Schools and Programming**

54	Grand Opening for New Schools	Nellie Carlson, Dr. Margaret-Ann Armour and Roberta McAdams Schools will hold their respective Board of Trustees-hosted grand openings in October. Funding for these events are not included in the DU's base allocation.		30,000
55	Support for 2017 schools	For 2016-2017 we'll need additional support to manage design needs specifically for: Official opening events for Nellie Carlson, Roberta MacAdams, Dr. Margaret-Ann Armour. Various communications pieces to support 11 new schools opening in 2017 including: Attendance area consultations and announcements. Visual identities and stationery packages, School naming (request for submissions and announcements), Signage, Custom materials about programming, registration, info nights, Career Pathways, Early Years expansion, renaming and program resources, Infrastructure consultations (mature communities, high school, Monthly summaries to support Strategic Plan Updates, Staff group recognition, Intranet redesign, Further improving the way we share information about choosing a school. However, beyond that, with a total of 14 new schools to serve, we need additional graphic design support to meet their needs.		139,755
56	Communications support for bringing 11 new schools online	Direct communications and event planning, communications support to new principals. We had a 0.6 position on contract to support the three new principals in their work to get up and running. Eleven new principals will require at least full time communications support so they can focus on hiring staff and resourcing their schools. The consequence of not having this position is that principals end up doing work in which they have little expertise and we have inequity among the eleven schools.		93,170
57	Accommodation Planning support	Hire a 1.00 FTE teacher consultant to support required work relating to new schools, highschool accommodation plan, and alternative program distribution review.		90,000
58	Stakeholder Engagement support	Additional resources required to support the continuing work with mature communities and other engagement initiatives. Resources will also be used to further develop the stakeholder engagement area.		90,000

**EPSB**  
**Central Initiatives to Support Schools - Notes**  
**2016-2017 Access to Surplus**

59	Early Years program moves	Due to growth pressures, two existing early years sites will be moving. This involves the moving of 4 classrooms from Homesteader being relocated to John Barnett and 4 classrooms from Waverly being relocated to Duggan.	250,000
60	Inclusive Learning relocation	To support the cost associated with relocating Inclusive Learning from Parkallen School to another district site.	100,000
61	Logistics for opening 11 new schools	To support cost related to the logistics & storage of furniture and equipment for new schools. (Space)	350,000
62	New School Openings	Additional staffing resources (for the HR Consulting Decision Unit) will be required to support new school openings for 2017.	300,000
<b>Subtotal Supports for the Establishment of New Schools and Programming</b>			<b>\$ 1,442,925</b>
<b>Total Access to Surplus Funds for 2016-2017</b>			<b>\$ 17,770,354</b>

**EPSB**  
**Capital Reserve Plan**  
**2016-2018**

ATTACHMENT III

	Amount	Total Amount
<b>Accumulated capital reserve at September 1, 2015</b>		<b>37,675,476</b>
Capital transactions during 2015-2016		<b>(611,945)</b>
<b>2015-2016 Transfer of surplus to capital reserves</b>		<b>20,000,000</b>
<b>Total capital reserve balance at September 1, 2016</b>		<b>57,063,531</b>
<b>Known use of capital reserves in 2016-2017:</b>		
1 Ameresco (Energy Efficiency) contract - signed November 2015 (ends Aug 2017)	8,000,000	
2 CFE Building Airhandling unit - RFP process initiated October 2016	500,000	
3 School Technologies - baseline to equalize schools (individual devices & other capital equipment costs)	1,600,000	
4 Energy retrofit (Design phase) - (2016-2017)	1,000,000	
	<u>11,100,000</u>	<u>(11,100,000)</u>
<b>Subtotal</b>		<b>45,963,531</b>
<b>Known use of capital reserves in 2017-2018:</b>		
4 Energy retrofit (On-going annual commitment) - (starting in 2017-2018)	5,000,000	<b>(5,000,000)</b>
5 <b>Remaining capital reserve balance:</b>		<b>40,963,531</b>

**Notes:**

1 Ameresco (Energy Efficiency) contract - Funding for a contractual commitment originally budgeted to be paid out of IMR funding support. The IMR funds will now be targeted towards school facility improvements and narrowing the equity gap between schools.

2 CFE Building Airhandling unit - replacement of the air handling units at CFE required as they have reached the end of their life cycle and require ongoing maintenance.

3 School Technologies - One time capital funding of \$1.6M to bring all schools to an equitable baseline relative to student technologies. The purchase of 4700 Chromebooks will bring all schools to a student to device ratio of 2:1. All schools will also have a technology plan in place to ensure sustainability and evergreening of student technologies over the long term.

4 Energy retrofit - Funds will be used to design for another energy efficiency (retrofit) contract. A two to three year contractual commitment to replace old mechanical and electrical systems in selected schools. The upfront costs associated with this initiative is more than offset by future utility cost savings.

5 The District is currently reviewing several options related to the capital reserve funds. Any request to access capital reserve funds will be brought forward for approval at a future public board meeting.

**DATE:** November 29, 2016

**TO:** Board of Trustees

**FROM:** Darrel Robertson, Superintendent of Schools

**SUBJECT:** Fall Update to the Revised 2016-2017 Budget

**ORIGINATOR:** Todd Burnstad, Chief Financial Officer

**RESOURCE STAFF:** Krista Brandon, Vanessa Croswell-Klettke, Jennifer Price

**REFERENCE:** N/A

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## ISSUE

Alberta Education requires jurisdictions to prepare and submit a budget update each fall. Jurisdictions are also required by Alberta Education to provide an update to the Board of Trustees identifying changes in revenue, enrolment, current staffing and other key budget assumptions.

## BACKGROUND

Each school and central decision unit prepared a revised budget in the fall based on updated September 30 enrolment, current staffing FTE's, as well as the planned use of surplus funds.

The 2016-2017 Fall Budget update for Edmonton Public Schools has been completed for submission to Alberta Education by November 30, 2016. The revised budget is based on total expenses of \$1.161 billion. Alberta Education requires school boards to report the government contribution of the Alberta Teachers' Retirement Fund (ATRF), which is estimated at \$56.9 million. The overall increase in the fall revised budget over the approved (spring) budget of \$39.2 million is as follows:

1. Increase in the use of net surplus carry forward funds of \$28.2 million.
2. Increase in revenues due to enrolment and other adjustments totaling \$11 million or 1.0 per cent.

## RELATED FACTS

- The 2016-2017 budget update reflects a planned operating deficit of \$60.8 million which is offset by the planned use of the District's accumulated operating surplus.
- Student enrolment assumptions are based on a total of 95,642 students, an increase of 237 or 0.3 per cent over the proposed enrolment count and an increase of 3,284 or 3.6 per cent over September 2015 (Attachment II)
- Fee Revenue: the District is continuing to examine options to reduce the related expenses that are not funded by the province and otherwise result in fees having to be charged. Total budgeted revenue from fees has decreased by \$355,000 compared to the 2015-2016 fall budget even though enrolment has increased by 3.6 percent year over year.
- The carbon tax takes effect on January 1, 2017, as such the financial impacts will be felt half-way through the current school year. At this time, the carbon tax will have the greatest impact on District utilities and student transportation; with anticipated costs reaching approximately \$1.2 million dollars during the 2017 calendar year and \$1.8 million dollars for the 2018 calendar year. The District is working with both internal and external consultants to help manage and navigate these impacts.

- Total FTE's are now budgeted at 8,710 with certificated staff representing 57 per cent (4,896 FTE's) followed by support staff at 26 per cent (2,236 FTE's) (Attachment VI).
- The 2016-2017 budgeted System Administration and Board Governance block spending is 3.1 per cent of total budget spending, which is under the 3.6 per cent spending cap set by the Province

## RECOMMENDATION

**That the fall 2016 Update to the 2016-2017 Budget be approved.**

## NEXT STEPS

Once approved the Fall 2016-2017 Revised Budget will be posted to the District's website and the Fall 2016 Update to the 2016-2017 Budget will be submitted to Alberta Education.

## ATTACHMENTS and APPENDICES

ATTACHMENT I	2016-2017 Fall Revised Revenue Budget
ATTACHMENT II	Student Enrolment
ATTACHMENT III	2016-2017 Fall Revised Budget – Total Allocations
ATTACHMENT IV	2016-2017 Fall Revised Budget – Direct School Allocations
ATTACHMENT IV <sup>A</sup>	2016-2017 Fall Revised Budget – Direct School Allocations Detailed Breakdown
ATTACHMENT V	2016-2017 Fall Revised Budget – Other Allocations
ATTACHMENT VI	2016-2017 Fall Revised Budget – Staff FTE's
ATTACHMENT VII	2016-2017 Fall Revised Budget – Revenue & Expense Analysis
ATTACHMENT VIII	Fall 2016 Update to the 2016-2017 Budget

TB:ja

**Edmonton Public Schools**  
**2016-2017 Fall Revised Revenue Budget**

	2016-2017 Fall Revised Budget (Fall)	2016-2017 Approved Budget (Spring)	Variance Fall vs Spring \$	Variance Fall vs Spring %	Notes
<b>BASE INSTRUCTION FUNDING</b>					
Early Childhood Services (ECS) Base Instruction	\$ 29,317,600	\$ 28,890,100	\$ 427,500	1.5%	
ECS Class Size	6,678,700	6,581,300	97,400	1.5%	
Base Instruction (Grades 1 to 9)	419,352,900	420,553,300	(1,200,400)	(0.3%)	
Class Size (Grades 1 to 3)	34,433,800	34,537,400	(103,600)	(0.3%)	
	489,783,000	490,562,100	(779,100)	(0.2%)	
High School (Grades 10 to 12)	152,755,000	145,248,100	7,506,900	5.2%	1
Base Instruction Metro (Grades 10 to 12)	906,500	882,400	24,100	2.7%	
Base Instr. Metro Summer (Grades 10 to 12)	5,544,200	5,410,600	133,600	2.5%	
Outreach Site Funding	377,800	377,800	-	-	
Home Education	691,700	660,000	31,700	4.8%	
	7,520,200	7,330,800	189,400	2.6%	
<b>SUBTOTAL BASE INSTRUCTION FUNDING</b>	<b>650,058,200</b>	<b>643,141,000</b>	<b>6,917,200</b>	<b>1.1%</b>	<b>1</b>
<b>DIFFERENTIAL COST FUNDING</b>					
ECS Program Unit Funding (PUF)	41,136,700	42,654,300	(1,517,600)	(3.6%)	2
Inclusive Education	65,864,100	66,276,000	(411,900)	(0.6%)	
English as a Second Language (ESL)	20,902,000	20,902,000	-	-	
First Nations, Metis and Inuit Education (FNMI)	9,507,300	9,357,800	149,500	1.6%	3
Building Collaboration and Capacity	30,750	30,750	-	-	
Socio Economic Status	10,958,600	10,722,700	235,900	2.2%	
Plant Operations and Maintenance (PO&M)	68,827,600	68,818,000	9,600	0.0%	
Metro Urban Transportation	24,788,300	24,673,300	115,000	0.5%	
ECS Special Transportation	2,472,800	2,009,400	463,400	23.1%	4
Equity of Opportunity	9,174,700	8,958,000	216,700	2.4%	
Federal French Funding	590,000	590,000	-	-	
<b>SUBTOTAL DIFFERENTIAL COST FUNDING</b>	<b>254,252,850</b>	<b>254,992,250</b>	<b>(739,400)</b>	<b>(0.3%)</b>	
<b>PROVINCIAL PRIORITY TARGETED FUNDING</b>					
High Speed Networking	2,198,400	2,198,400	-	-	
<b>SUBTOTAL PROVINCIAL PRIORITY FUNDING</b>	<b>2,198,400</b>	<b>2,198,400</b>	<b>-</b>	<b>-</b>	
<b>OTHER PROVINCIAL SUPPORT</b>					
Institutional Support	10,220,700	10,205,600	15,100	0.1%	
Regional Collaborative Service Delivery (RCSD)	3,883,800	3,767,800	116,000	3.1%	
Provincial School Lease Support	2,052,600	-	2,052,600	100.0%	5
Narrowing Teacher's Salary Gap	239,000	239,000	-	-	
Reduction in System Admin & School Board Governance	(3,973,000)	(3,973,000)	-	-	
<b>SUBTOTAL OTHER PROVINCIAL SUPPORT</b>	<b>12,423,100</b>	<b>10,239,400</b>	<b>2,183,700</b>	<b>21.3%</b>	
<b>TOTAL PROVINCIAL OPERATIONAL FUNDING</b>	<b>918,932,550</b>	<b>910,571,050</b>	<b>8,361,500</b>	<b>0.9%</b>	

**Edmonton Public Schools  
2016-2017 Fall Revised Revenue Budget**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance Fall vs Spring \$</b>	<b>Variance Fall vs Spring %</b>	<b>Notes</b>
<b>CAPITAL AND IMR FUNDING</b>					
Infrastructure Maintenance Renewal (IMR)	9,673,300	9,673,300	-	-	
Amortization of Capital Allocations and Expended Deferred Capital Revenue	35,137,200	35,137,200	-	-	
<b>CAPITAL AND IMR FUNDING</b>	<b>44,810,500</b>	<b>44,810,500</b>	<b>-</b>	<b>-</b>	
<b>OTHER PROVINCIAL REVENUES</b>					
Tuition Agreements	1,262,500	1,281,800	(19,300)	(1.5%)	
Secondments - Provincial	2,889,000	2,889,000	-	-	
Alberta Education Conditional Grants	428,800	242,000	186,800	77.2%	6
Alberta Teachers' Retirement Fund (ATRF)	56,915,300	55,686,200	1,229,100	2.2%	7
<b>SUBTOTAL OTHER PROVINCIAL REVENUES</b>	<b>61,495,600</b>	<b>60,099,000</b>	<b>1,396,600</b>	<b>2.3%</b>	
<b>TOTAL GOVERNMENT OF ALBERTA</b>	<b>1,025,238,650</b>	<b>1,015,480,550</b>	<b>9,758,100</b>	<b>1.0%</b>	
<b>OTHER PROVINCIAL GRANTS</b>	<b>3,042,800</b>	<b>3,073,500</b>	<b>(30,700)</b>	<b>(1.0%)</b>	
<b>FEDERAL GOVERNMENT AND FIRST NATIONS</b>	<b>2,364,600</b>	<b>2,209,000</b>	<b>155,600</b>	<b>7.0%</b>	8
<b>OTHER ALBERTA SCHOOL AUTHORITIES</b>	<b>795,800</b>	<b>819,100</b>	<b>(23,300)</b>	<b>(2.8%)</b>	
<b>FEES</b>					
School Fees - School Generated Funds	13,300,000	13,490,400	(190,400)	(1.4%)	9
Transportation Fees	12,271,500	12,201,200	70,300	0.6%	
Lunch Program Fees	4,166,800	4,200,300	(33,500)	(0.8%)	10
Metro Continuing Education Fees	556,400	555,600	800	0.1%	
Textbook Rental Fees	1,390,800	1,424,500	(33,700)	(2.4%)	
Music Instrument & Other Material Fees	292,700	237,900	54,800	23.0%	11
<b>SUBTOTAL FEES</b>	<b>31,978,200</b>	<b>32,109,900</b>	<b>(131,700)</b>	<b>(0.4%)</b>	
<b>OTHER SALES AND SERVICES</b>					
International Student Tuition	7,050,000	7,637,500	(587,500)	(7.7%)	12
Sales and Services - Schools & Central DU's	5,133,800	4,635,800	498,000	10.7%	13
Other Sales and Services - School Generated Funds	5,300,000	5,415,200	(115,200)	(2.1%)	
Secondments - Other Entities	1,238,200	1,238,200	-	-	
Adult Education	2,185,200	2,322,100	(136,900)	(5.9%)	14
<b>SUBTOTAL SALES AND SERVICES</b>	<b>20,907,200</b>	<b>21,248,800</b>	<b>(341,600)</b>	<b>(1.6%)</b>	
<b>INVESTMENT INCOME</b>	<b>3,200,000</b>	<b>3,200,000</b>	<b>-</b>	<b>-</b>	
<b>GIFTS AND DONATIONS</b>					
School Gifts and Donations	5,590,700	4,975,900	614,800	12.4%	15
EPSB Foundation Support	450,000	450,000	-	-	
<b>SUBTOTAL GIFTS AND DONATIONS</b>	<b>6,040,700</b>	<b>5,425,900</b>	<b>614,800</b>	<b>11.3%</b>	
<b>FUNDRAISING - School Generated Funds</b>	<b>1,900,000</b>	<b>1,888,100</b>	<b>11,900</b>	<b>0.6%</b>	
<b>RENTAL OF FACILITIES</b>	<b>4,971,000</b>	<b>4,030,100</b>	<b>940,900</b>	<b>23.3%</b>	16
<b>TOTAL OPERATING REVENUE</b>	<b>\$ 1,100,438,950</b>	<b>\$ 1,089,484,950</b>	<b>\$ 10,954,000</b>	<b>1.0%</b>	

**Notes to the  
2016-2017 Fall Revised Revenue Budget**

*Unless otherwise noted, variance explanations have been provided for amounts where the 2016-2017 fall revised budget differs from the 2016-2017 approved (spring) budget by more than 5%.*

**1 Base Instruction Funding**

The base instruction funding has been updated to reflect the actual September 30th enrolment (see attachment II), vs a projection used in the approved (spring) budget. The total actual fall enrolment is very close to the projection (difference of 0.3%), however, larger differences exist within the specific enrolment categories which impact the total amount of base funding the District will receive.

**2 ECS Program Unit Funding (PUF)**

The PUF budgeted revenue is lower than the approved budget, reflecting slight variations in the composition of the students (level of special needs) as well as a slightly lower enrolment at September 30th. Late registrations have been subsequently received and are expected to continue. The District will receive pro-rated funding for PUF approved children even after the September 30th enrolment date.

**3 First Nations, Metis and Inuit Education (FNMI)**

Funding is based on the projected number of self-identified students as at September 30th. Out of the total amount received, approximately 82% is allocated directly to schools and approximately 18% is allocated to a central decision unit exclusively providing supports for FNMI education.

**4 ECS Special Transportation**

The fall budget has been updated to reflect the number of service days as well as the number of Early Education and Early Learner riders. We are predicting a 10.5% increase in ridership related to the establishment of 7 new early learning sites.

**5 Provincial School Lease Support**

This funding is provided by the Province for the lease of privately owned facilities. EPSB has to apply for this funding each year and only includes it in the budget once confirmation of approval has been received.

**6 Alberta Education Conditional Grants**

Grants are only included in the spring budget if they are confirmed. It is anticipated these will increase between the spring and the fall as additional grant applications are completed and approved. The fall budget now includes a grant for \$152K for the development of Provincial Arabic Language Arts curriculum.

**7 Alberta Teachers' Retirement Fund (ATRF)**

This amount represents a flow-through of teacher retirement benefits paid by the Province on behalf of our teachers and matches the revenue from the Province. As a result of including access to District surplus funds with the fall budget, the total number of certificated staff have increased, resulting in a higher flow through budget for ATRF.

**8 Federal Government and First Nations**

Fees for non-resident students are billed directly to First Nations and the remaining students are funded by the Federal Government (Aboriginal Affairs and Northern Development Canada - AANDC) and are included on the nominal role. The fall budget includes 41 students from the Enoch band and 9 students directly funded from AANDC. Metro also receives funding from the Federal Government and has included increased funding from LINC (Language Instruction for Newcomers).

**Notes to the  
2016-2017 Fall Revised Revenue Budget**

**9 School Fees - School Generated Funds**

School generated funds are funds raised in the community for student activities under the control and responsibility of school management. The funds are collected and retained for expenses at the school level. For budget reporting purposes these funds have been consolidated into the District budget. The fall budget has been updated to reflect the actual fee amounts that are being received for such things as drama, field trips, ski club, physical education and school teams.

**10 Lunch Program Fees**

In conjunction with the 2016-2017 Budget, a lunch fee cost sharing model was rolled out to all schools in order to standardize the calculation of fees being charged. The reduction in fees reflects schools absorbing the costs associated with custodial time and SES directly related to the lunch program into their operating budget.

**11 Music Instrument & Other Material Fees**

The budget for these activities has slightly increased based on prior year actual results recognized in 2015-2016.

**12 International Student Fees**

The total number of international students continues to grow and is projected to reach 650 by the end of June 2017. The decrease from the spring budget reflects a timing difference where less students were here by September 30th but are still expected to arrive prior to the second semester starting in February 2017.

**13 Sales and Services - Schools & Central DU's**

The Fall Revised Budget includes higher anticipated society funding to support the alternative programs and includes covering the costs associated with providing a Christian liaison person, and Judaic Studies content teachers.

**14 Adult Education**

Metro Continuing Education - The Academic cost centre is budgeting for a small decrease in diploma preparation classes, correspondence and adult students over 20 in the evening academic classes. There is also a budget decrease in the Continuing Education cost centre for online learning classes.

**15 School Gifts and Donations**

This revenue line is an estimate of school generated donations and fundraising activities. These funds are restricted to support the activities and programs at the schools and are directly offset by related expenditures. Schools typically don't fully budget for these in the spring as there is uncertainty around these initiatives.

**16 Rental of Facilities**

Property Management saw a shift in expected revenues in the months after the approved (spring) budget due to an increase in lease revenue for closed sites \$75K, primarily made up of a current tenant taking over an additional floor; estimated recoverable maintenance and upfit for tenant space in open and closed schools \$866K which includes the Francophone District upfit of Queen Mary Park (\$281K).

**Edmonton Pubic Schools**  
**Revised 2016-2017 September 30, 2016 Enrolment vs Proposed 2016-2017 Enrolment**  
**Funded vs Other**

<b>Student Enrolment by Division</b>	<b>2016-2017 September 30 Actual Enrolment</b>	<b>2016-2017 Spring Projected Enrolment</b>	<b>Enrolment Increase</b>	<b>Variance %</b>	<b>2015-2016 September 30 Actual Enrolment</b>
<b>Funded Students:</b>					
Early Childhood Services (ECS)	<b>8,778</b>	8,650	128	1.5%	8,575
Elementary	<b>43,386</b>	43,622	(236)	(0.5%)	41,304
Junior High	<b>19,394</b>	19,337	57	0.3%	18,790
Senior High	<b>23,072</b>	22,601	471	2.1%	22,661
Subtotal - Enrolment for Grades 1-12	<b>85,851</b>	85,560	291	0.3%	82,755
<b>Subtotal Funded Students</b>	<b>94,629</b>	94,210	419	0.4%	91,330
<b>Other :</b>					
International Students	<b>511</b>	650	(139)	(21.4%)	534
Home Education	<b>414</b>	395	19	4.8%	382
Other/Non Resident/Blended/Sponsorships/ Unfunded non special needs children	<b>88</b>	100	(12)	(12.4%)	112
<b>Subtotal Other Students</b>	<b>1,013</b>	1,145	(132)	(11.6%)	1,028
<b>Total Student Enrolment</b>	<b>95,642</b>	95,355	287	0.3%	92,358

**Edmonton Public Schools  
2016-2017 Fall Revised Budget  
Total Allocations**

		<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>Projected Revenue</b>	*					
Operating Revenue		\$ 1,100,438,950	\$ 1,089,484,950	\$ 10,954,000	1.0%	
Operating Reserve Funds <sup>A</sup>		60,752,015	32,512,643	28,239,372	86.9%	A
Operating Revenue		<u>\$ 1,161,190,965</u>	<u>\$ 1,121,997,593</u>	<u>\$ 39,193,372</u>	<u>3.5%</u>	
<b>School Allocations (Attachment IV)</b>						
School Allocations Levels 1 to 8		\$ 633,874,832	\$ 621,113,904	\$ 12,760,928	2.1%	1
Other Supplemental School Allocations		151,127,460	145,224,540	5,902,920	4.1%	2
		<u>785,002,292</u>	<u>766,338,444</u>	<u>18,663,848</u>	<u>2.4%</u>	
School Generated Funds/External Revenues		35,707,066	35,264,444	442,622	1.3%	3
<b>Subtotal School Allocations</b>	73.6%	<b>820,709,358</b>	<b>801,602,888</b>	<b>19,106,470</b>	<b>2.4%</b>	
<b>Other Allocations (Attachment V)</b>						
Metro Continuing Education		11,715,296	11,641,738	73,558	0.6%	
External Revenue Allocations - Central		12,198,295	10,835,318	1,362,977	12.6%	4
District Level Fixed Costs	6.6%	73,800,067	73,800,067	-	-	5
District Level Committed Costs	7.4%	82,610,556	81,768,669	841,887	1.0%	5
		<u>180,324,214</u>	<u>178,045,792</u>	<u>2,278,422</u>	<u>1.3%</u>	
Central Decision Units	5.2%	57,650,905	54,150,070	3,500,835	6.5%	6
<b>Subtotal Other Allocations</b>		<b>237,975,119</b>	<b>232,195,862</b>	<b>5,779,257</b>	<b>2.5%</b>	
<b>Alberta Teachers' Retirement Fund (ATRF)</b>		<b>56,915,300</b>	<b>55,686,200</b>	<b>1,229,100</b>	<b>2.2%</b>	7
<b>Total Allocations</b>		<b>1,115,599,777</b>	<b>1,089,484,950</b>	<b>26,114,827</b>	<b>2.4%</b>	
Planned Use of Reserves <sup>B</sup>		45,591,188	32,512,643	13,078,545	40.2%	B
<b>Total Budget</b>		<u><b>\$ 1,161,190,965</b></u>	<u><b>\$ 1,121,997,593</b></u>	<u><b>\$ 39,193,372</b></u>	<u><b>3.5%</b></u>	

## Notes

- \* The amount as a percentage of the total allocations (prior to using Reserve<sup>B</sup> funds).
- A Additional details around the District's planned use of accumulated operating surplus funds will be presented at Public Board on November 29, 2016.
- B The difference of \$15.2 million between the amount shown for Note A (\$60.8 million) and this amount (\$45.6 million) represents surplus funds that were included in the School Allocations (refer to Notes 1 and 2 for additional details).

**Notes to the  
2016-2017 Fall Revised Budget  
Total Allocations**

*Unless otherwise noted, variance explanations have been provided for amounts where the 2016-2017 fall revised budget differs from the 2016-2017 approved (spring) budget by more than 5%.*

**1 School Allocations Levels 1 to 8**

School Allocations for the approved (spring) budget were based on pre-enrolment projections which predict the number of students at each grade level and the number of students requiring specialized services, these calculations are updated in the fall based on actual September 30th enrolment. These allocations are further detailed on Attachment IV.

In efforts to support the District's most vulnerable students, using \$9.6 million of the District's surplus, student allocation rates for English Language Learners (ELL) were adjusted where students in Division I who previously only received a level 1 allocation, will now receive level 3. The level 3 allocation was then also increased by 5% over the 2016-2017 approved budget. In addition, students identified as having severe special needs (levels 7 and 8) received a 10% allocation increase over the 2016-2017 approved (spring) budget.

**2 Other Supplemental School Allocations**

Included in this category of school allocations are the Base Allocation, Equity Fund, Plant Operation & Maintenance (PO&M), Program Enhancement Allocations and the High Social Vulnerability Allocation. These allocations are further detailed on Attachment IV.

Equity fund: In the spring an allocation of \$4 Million was established. For the fall, any school surplus balances in excess of the 3% carryforward threshold was added to the Equity Fund for 2016-2017. The total increase to the Equity Fund using District surplus funds is \$5.6 million.

**3 School Generated Funds/External Revenues**

School generated funds are funds raised in the community for expenses at the school level. School external revenues include board approved textbook rental fees, lunch program fees, grants, as well as school lease rentals. The District is continuing to examine options to reduce the related expenses that are not funded by the Province and otherwise result in fees having to be charged.

**4 External Revenue Allocations - Central**

The Central external revenue is comprised mostly of secondment revenue from the Alberta Government, other grants, and lease and parking revenue. Typically the amount included in the spring is lower than the updated amount in the fall, as there is often uncertainty around some of the assumptions.

**5 District Level Fixed / District Level Committed Costs**

These allocations have been updated to reflect the anticipated fixed and committed costs for 2016-2017. Additional details on these costs have been included on Attachment V.

**6 Central Decision Units**

The increase is due to a change in the District's cost recovery practices, where the mark-up component on materials purchased from ITS Stores, the Distribution Centre, and Facilities Services have been eliminated. Any material items purchased will now be charged to schools or central departments at true cost (thereby increasing buying power). To offset this, a base allocation has been provided directly to these cost recovery cost centres. Additional details on the Central Decision Units is included on Attachment V.

**7 Alberta Teachers' Retirement Fund (ATRF)**

This amount represents a flow-through of teacher retirement benefits paid by the Province on behalf of our teachers and matches the revenue from the Province. As a result of including access to District surplus funds with the fall budget, the total number of certificated staff have increased, resulting in a higher flow through budget for ATRF.

**Edmonton Public Schools  
2016-2017 Fall Revised Budget  
Direct School Allocations**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>School Allocations</b>					
Kindergarten (1/2 day)	\$ 17,253,318	\$ 16,876,608	\$ 376,710	2.2%	
Kindergarten (full day)	3,729,728	3,881,448	(151,720)	(3.9%)	
Elementary	212,294,832	209,751,761	2,543,071	1.2%	
Junior High	88,087,358	86,821,305	1,266,053	1.5%	
Senior High	107,197,566	104,010,493	3,187,073	3.1%	
International Students	4,430,376	5,031,000	(600,624)	(11.9%)	1
Special Needs Levels 4 - 8	132,453,458	125,186,490	7,266,968	5.8%	2
Institutions, ASD & Early Education (PUF) Allocations	68,428,196	69,554,799	(1,126,603)	(1.6%)	
<b>Subtotal School Allocations</b>	<b>633,874,832</b>	<b>621,113,904</b>	<b>12,760,928</b>	<b>2.1%</b>	
<b>Other Supplemental School Allocations</b>					
Base Allocation	51,044,793	49,660,476	1,384,317	2.8%	
Class Size Funding	34,537,402	34,537,402	-	-	
Plant Operation & Maintenance - Schools	19,778,398	19,749,057	29,341	0.1%	
* First Nations, Metis and Inuit Education (FNMI)	7,838,535	7,689,068	149,467	1.9%	* 3
* Program Enhancement Allocations	12,084,284	13,470,007	(1,385,723)	(10.3%)	* 4
* Other Miscellaneous Allocations	2,026,545	2,036,600	(10,055)	(0.5%)	* 5
Equity Fund	9,556,232	4,000,000	5,556,232	138.9%	6
High Social Vulnerability	4,000,000	4,000,000	-	-	
High Social Vulnerability - 1 year Transition	1,075,614	1,054,368	21,246	2.0%	
Regional Collaborative Service Delivery RCSD)	3,883,770	3,767,822	115,948	3.1%	
Enhanced Support for Schools	1,818,680	1,818,680	-	-	
Facility Use Payments - Christian Schools	1,346,792	1,346,792	-	-	
amiskwaciy Base Rent	1,181,935	1,181,935	-	-	
Foundation Full Day Kindergarten Funding	427,348	440,338	(12,990)	(3.0%)	
Community Use of Schools	527,132	471,995	55,137	11.7%	7
<b>Subtotal Other Supplemental School Allocations</b>	<b>151,127,460</b>	<b>145,224,540</b>	<b>5,902,920</b>	<b>4.1%</b>	
<b>Subtotal School and Other Supplemental Allocations</b>	<b>785,002,292</b>	<b>766,338,444</b>	<b>18,663,848</b>	<b>2.4%</b>	
<b>School Generated Funds/External Revenues</b>	<b>35,707,066</b>	<b>35,264,444</b>	<b>442,622</b>	<b>1.3%</b>	
<b>Total Direct School Allocations</b>	<b>\$ 820,709,358</b>	<b>\$ 801,602,888</b>	<b>\$ 19,106,470</b>	<b>2.4%</b>	

\* See Attachment IV<sup>A</sup> - for a detailed breakdown of this line item.

**Edmonton Public Schools  
2016-2017 Fall Revised Budget  
Direct School Allocations  
Detailed Breakdown - Other Supplemental School Allocations**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>First Nations, Metis and Inuit Education (FNMI)</b>					
FNMI Per Student	\$ 7,397,535	\$ 7,248,068	\$ 149,467	2.1%	
Transportation to amiskwacyi & Awasis Program	441,000	441,000	-	-	
	<b>\$ 7,838,535</b>	<b>\$ 7,689,068</b>	<b>\$ 149,467</b>	<b>1.9%</b>	<b>3</b>

*FNMI funding is based on the number of self identified students at September 30th. Out of the total amount received, the majority (82%) is allocated directly to schools and a portion (18%) is allocated to a central decision unit to support FNMI education.*

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>Program Enhancement Allocations</b>					
New to District	\$ 4,500,000	\$ 4,000,000	\$ 500,000	12.5%	
Guaranteed Enrolment	2,442,131	4,986,434	(2,544,303)	(51.0%)	
Outreach Program	3,543,948	3,365,943	178,005	5.3%	
Transfers from Institutions	350,000	350,000	-	-	
Establishment Facilities Grant	992,224	505,886	486,338	96.1%	
Establishment Program Grant	255,981	261,744	(5,763)	(2.2%)	
	<b>\$ 12,084,284</b>	<b>\$ 13,470,007</b>	<b>\$ (1,385,723)</b>	<b>(10.3%)</b>	<b>4</b>
<b>Other Miscellaneous Allocations</b>					
Addition to Basic	\$ 793,050	\$ 751,709	\$ 41,341	5.5%	
ELC Teacher Allocation	1,233,495	1,284,891	(51,396)	(4.0%)	
	<b>\$ 2,026,545</b>	<b>\$ 2,036,600</b>	<b>\$ (10,055)</b>	<b>(0.5%)</b>	<b>5</b>

**Notes to the  
2016-2017 Fall Revised Budget  
Direct School Allocations**

*Unless otherwise noted, variance explanations have been provided for amounts where the 2016-2017 fall revised budget differs from the 2016-2017 spring proposed budget by more than 5%.*

**1 International Students**

The total number of international students continues to grow and is projected to reach 650 by the end of June 2017. The decrease from the approved (spring) budget reflects a timing difference where less students were here by September 30th but are still expected to arrive prior to the second semester starting in February 2017.

**2 Special Needs Levels 4-8**

School Allocations for the approved budget are based on enrolment projections which attempt to predict the number of students at each grade level and the number of students requiring specialized supports. The fall revised budget is based on an actual headcount at September 30th. It is expected that there will be differences in the composition of students between the approved and the revised budgets. In addition, students identified as having severe special needs (level 7 and 8) received a 10% allocation increase over the 2016-2017 approved (spring) budget through access to surplus funds.

**3 First Nations, Metis and Inuit Education (FNMI)**

The per student allocation is based on the number of students who self identify at September 30th. The transportation portion of the allocation provides transportation for junior high students attending amiskwacyi academy and elementary students attending the Awasis program.

**4 Program Enhancement Allocations**

New to District

This allocation is held centrally and allocated to schools during the year to support students arriving after September 30th.

Guaranteed Enrolment

This allocation provides a guaranteed amount of funds for approved special education programs where due to low student enrolment, the student driven allocation is not able to support the program. The guaranteed enrolment is provided based on 12 students for mild-moderate funded special education programs and 7 students for severe funded special education programs. If the number of students registered in a special education program does not generate the guaranteed level of funding for that program, the school will receive funds to reach the guaranteed level. This allocation is always higher in the spring vs the fall as program enrolment details are incomplete in the spring.

Outreach Program

This allocation is provided to the Outreach and New Directions sites to cover fixed and committed costs in order to support high risk students that have been placed by the District.

Transfers from Institutions

This allocation is given to schools for students who meet district special needs coding criteria and who were enrolled in an institutional school on September 30th and will be subsequently returned to a school after that date.

Establishment Facilities Grant

This allocation provides financial support to physically accommodate students in schools identified for new alternative and special education programs. The annual amount of the allocation is \$150,000 which is then added onto any prior approved/deferred amounts.

Establishment Program Grant

This allocation provides financial support in terms of start up costs associated with the implementation of new programs. The annual amount of the allocation is \$100,000 which is then added onto any prior approved/deferred amounts.

**Notes to the  
2016-2017 Fall Revised Budget  
Direct School Allocations - continued**

**5 Other Miscellaneous Allocations**

Addition to Basic

This allocation is for schools with unique situations that require additional funds for instructional and/or operational purposes. This allocation is analysed and adjusted every budget cycle.

ELC Teacher Allocation

This allocation covers the cost of a teacher FTE per approved early learning classroom (ELC). For 2016-2017, the Early Years Program has been expanded to include Bisset, Callingwood, Grovenor, Lansdowne and Steinhauer.

**6 Equity Fund**

In the spring an allocation of \$4 Million was established. For the fall, any school surplus balances in excess of the 3% carryforward threshold was added to the Equity Fund for use in 2016-2017. The total increase to the Equity Fund using District surplus funds was \$5.6 million.

The Equity Fund was established by the Superintendent in 2014-2015 to enhance opportunities for all schools in the District and to support the District's Four Cornerstone Values: Collaboration, Accountability, Integrity, and Equity.

The Equity Fund allocation is distributed to the four School Leadership Groups supervised by the Assistant Superintendents. The percentage allocated to School Leadership Groups was determined through the Superintendent's meetings with the District Support Team and the Superintendent's Community of Practice (SCOPE). Within each School Leadership Group, catchment allocations are determined in consultation with the Assistant Superintendent, and based on criteria established by the Leadership Group. Priority is given to projects impacting literacy, numeracy, and mental health.

Within each School Leadership group, a portion of the allocation is directed towards an assessment fund in support of timely, informative student assessments. Programming for student differences consultants from each Leadership group work with Inclusive Learning services to prioritize student assessments. A portion is also directed to a holdback fund to support schools that encounter unusual or unexpected budget challenges during the school year. These funds are distributed to schools at the discretion of the Assistant Superintendent.

**7 Community Use of Schools**

The fall budget allocations were updated based on the most recent actual financial results for the 2015-2016 school year.

**Edmonton Public Schools  
2016-2017 Fall Revised Budget  
Other Allocations**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>District Level Fixed Costs</b>					
Debt and Fiscal Services	\$ 48,340,826	\$ 48,340,826	\$ -	-	1
Utilities	19,000,000	19,000,000	-	-	
Insurance	3,939,241	3,939,241	-	-	
High Speed Networking	2,520,000	2,520,000	-	-	
	<b>73,800,067</b>	<b>73,800,067</b>	<b>-</b>	<b>-</b>	
<b>District Level Committed Costs</b>					
Student Transportation	40,395,808	39,974,411	421,397	1.1%	
School Plant Operations & Maintenance	15,276,051	15,276,051	-	-	
Human Resources Supply Services	13,469,918	13,469,918	-	-	
* Language and Cultural Support	3,845,223	3,845,223	-	-	*
Enterprise Systems	4,034,286	3,819,286	215,000	5.6%	2
Professional Improvement Leaves	1,340,000	1,340,000	-	-	
Enhanced Support for District Plan	1,000,000	1,000,000	-	-	
Central Building Maintenance	1,000,000	1,000,000	-	-	
Staff Development	650,000	650,000	-	-	
Election	480,000	480,000	-	-	
* Partnership Commitments	446,490	381,000	65,490	17.2%	*
School Resource Officer (SRO)	140,000	-	140,000	100.0%	3
Human Resources Secondments	122,334	122,334	-	-	
Audit	136,946	136,946	-	-	
Board Initiative Fund	45,000	45,000	-	-	
Survey	160,000	160,000	-	-	
District Awards	30,000	30,000	-	-	
Youth Engagement Model	26,000	26,000	-	-	
Trustee Transition Allowance	12,500	12,500	-	-	
	<b>82,610,556</b>	<b>81,768,669</b>	<b>841,887</b>	<b>1.0%</b>	
<b>External Revenue Allocation</b>	<b>12,198,295</b>	<b>10,835,318</b>	<b>1,362,977</b>	<b>12.6%</b>	<b>4</b>
<b>Metro Continuing Education</b>	<b>11,715,296</b>	<b>11,641,738</b>	<b>73,558</b>	<b>0.6%</b>	
	<b>23,913,591</b>	<b>22,477,056</b>	<b>1,436,535</b>	<b>6.4%</b>	
<b>Central Decision Units</b>					
** Board and Office of the Superintendent	7,720,948	7,285,435	435,513	6.0%	**
** Corporate Services	19,349,685	18,793,248	556,437	3.0%	**
** Finance and Infrastructure	18,610,061	15,942,576	2,667,485	16.7%	**
Inclusive Learning	6,375,631	6,375,631	-	-	
International Programs	1,179,000	1,337,600	(158,600)	(11.9%)	5
Curriculum and Resource Support	2,462,602	2,462,602	-	-	
Research and Innovation for Student Learning	1,086,067	1,086,067	-	-	
Student Information	866,911	866,911	-	-	
	<b>57,650,905</b>	<b>54,150,070</b>	<b>3,500,835</b>	<b>6.5%</b>	
<b>Total</b>	<b>\$ 237,975,119</b>	<b>\$ 232,195,862</b>	<b>\$ 5,779,257</b>	<b>2.5%</b>	

\* See Attachment V<sup>A</sup> - for a detailed breakdown of this line item.

\*\* See Attachment V<sup>B</sup> - for a detailed breakdown of this line item.

**Edmonton Public Schools**  
**2016-2017 Fall Revised Budget**  
**Other Allocations**  
**Detailed Breakdown - District Level Committed Costs**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>Language and Cultural Support</b>					
FNMI Education	\$ 1,668,736	\$ 1,668,736	\$ -	-	
Diversity Education	1,143,158	1,143,158	-	-	
Languages Centre at Woodcroft	1,033,329	1,033,329	-	-	
	<b>\$ 3,845,223</b>	<b>\$ 3,845,223</b>	<b>\$ -</b>	<b>-</b>	
<b>Partnership Commitments</b>					
Partnership for Kids	\$ 182,000	\$ 182,000	\$ -	-	
Confucius Institute	205,490	140,000	65,490	46.8%	6
Cappies	20,000	20,000	-	-	
Community University Partnerships	10,000	10,000	-	-	
Careers: The Next Generation	10,000	10,000	-	-	
United Way	9,000	9,000	-	-	
Corporate Challenge	5,000	5,000	-	-	
Welcome to Kindergarten	5,000	5,000	-	-	
	<b>\$ 446,490</b>	<b>\$ 381,000</b>	<b>\$ 65,490</b>	<b>17.2%</b>	

**Edmonton Public Schools**  
**2016-2017 Fall Revised Budget**  
**Other Allocations**  
**Detailed Breakdown - Central Decision Units**

	<b>2016-2017 Fall Revised Budget (Fall)</b>	<b>2016-2017 Approved Budget (Spring)</b>	<b>Variance \$</b>	<b>Variance %</b>	<b>Notes</b>
<b>Board and Office of the Superintendent</b>					
Board of Trustees	\$ 1,049,625	\$ 868,489	\$ 181,136	20.9%	7
Office of the Superintendent of Schools	767,833	767,833	-	-	
Governance and Strategic Support Serv.	1,938,322	1,938,322	-	-	
District Support Services	1,708,636	1,644,259	64,377	3.9%	
General Counsel	857,408	607,408	250,000	41.2%	8
School Leadership Group A	354,774	369,774	(15,000)	(4.1%)	
School Leadership Group B	349,145	364,145	(15,000)	(4.1%)	
School Leadership Group C	349,145	364,145	(15,000)	(4.1%)	
School Leadership Group D	346,060	361,060	(15,000)	(4.2%)	
	<u>\$ 7,720,948</u>	<u>\$ 7,285,435</u>	<u>\$ 435,513</u>	<u>6.0%</u>	
<b>Corporate Services</b>					
Communications	\$ 2,395,785	\$ 2,343,348	\$ 52,437	2.2%	
District Information Security	385,203	385,203	-	-	
District Records and FOIP Management	606,450	606,450	-	-	
District Technology	6,605,934	6,101,934	504,000	8.3%	9
Edmonton Public Schools Foundation	413,055	413,055	-	-	
Human Resources	8,943,258	8,943,258	-	-	
	<u>\$ 19,349,685</u>	<u>\$ 18,793,248</u>	<u>\$ 556,437</u>	<u>3.0%</u>	
<b>Finance and Infrastructure</b>					
Facilities Services & Building Ops	\$ 3,248,106	\$ 2,414,656	\$ 833,450	34.5%	9
Distribution Centre	\$ 1,563,667	-	1,563,667	100.0%	9
Financial Services	6,693,040	6,422,672	270,368	4.2%	10
Planning & Property Management	7,105,248	7,105,248	-	-	
	<u>\$ 18,610,061</u>	<u>\$ 15,942,576</u>	<u>\$ 2,667,485</u>	<u>16.7%</u>	

**Notes to the  
2016-2017 Fall Revised Budget  
Other Allocations**

*Unless otherwise noted, variance explanations have been provided for amounts where the 2016-2017 fall revised budget differs from the 2016-2017 approved (spring) budget by more than 5%.*

**1 Debt and Fiscal Services**

This decision unit is responsible for supported debenture and principal repayments and interest costs, and the amortization costs for all District capital assets, e.g. buildings, furniture and equipment, and vehicles. The allocation includes amortizing the new schools that became operational in September 2016.

**2 Enterprise Systems**

This decision unit is responsible for our main district enterprise information system license and maintenance fees including Financial (Oracle business suite), Human Resources (Peoplesoft) and Student information (Powerschool) as well as other feeder systems. The increase reflects the updated costs to maintain these licenses.

**3 School Resource Officer (SRO)**

Newly announced for 2016-2017, four junior high schools will share two SRO positions.

**4 External Revenue Allocation**

Reflects an increase in anticipated lease revenue where Property Management saw a shift in expected revenues in the months following the approved (spring) budget due to an increase in lease revenue for closed sites \$75K, primarily made up of a current tenant taking over an additional floor; estimated recoverable maintenance and upfit for tenant space in open and closed schools \$866K which includes the Francophone District upfit of Queen Mary Park (\$281K).

**5 International Programs**

The number of international students continues to increase, however, students previously projected for September are now anticipated to start for the second semester (February 2017). The International Programs DU receives an allocation based on the amount of international students attending EPSB.

**6 Confucius Institute**

The increase reflects an increase to the Director unit cost as well as the reimbursement of a portion of the administrative costs as per an agreement between EPSB and the Confucius Institute.

**7 Board of Trustees**

The fall budget includes the hiring of a new position, Director Board and Superintendent Relations.

**8 General Counsel**

The increase in allocation reflects a correction to more accurately cover the costs (internal and external) associated with this function.

**9 District Technology/Facilities Services/Distribution Centre**

The increase in these cost recovery departments reflects a change to the cost recovery model effective for the fall of 2016. Up to now, a mark up component was added to the price of materials prior to being sold to schools or other Central departments within the District. The mark up was used to cover the operating costs of the Central DU providing the service. Moving forward, an allocation will be provided directly to the Central DU in lieu of a mark up. This will increase the spending power of schools and central departments purchasing goods from the District's Distribution Centre, ITS Stores, or Facility Management.

**10 Financial Services**

The fall budget includes the hiring of a new executive director position, the Chief Financial Officer.

**Edmonton Public Schools  
2016-2017 Fall Revised Budget  
Staff FTE's**

Staffing Group	2016-2017 Fall Revised Budget (Fall)	%	2015-2016 Approved Budget (Spring)	%	Net Change Fall vs Spring	2015-2016 Fall Revised Budget	%
<b>Schools</b>							
Teaching FTE	4,803.68	62%	4,745.13	60%	58.55	4,595.61	62%
Support FTE	2,062.75	27%	2,284.43	29%	(221.68)	2,005.32	27%
Custodial FTE	582.37	8%	578.85	7%	3.52	565.61	8%
Exempt FTE	246.22	3%	239.91	3%	6.31	219.70	3%
<b>Total Schools FTE</b>	<b>7,695.01</b>	<b>100%</b>	<b>7,848.32</b>	<b>100%</b>	<b>(153.31)</b>	<b>7,386.24</b>	<b>100%</b>
<b>Central Services</b>							
Teaching FTE	175.63	18%	131.75	14%	43.88	129.27	14%
Support FTE	156.82	16%	154.42	17%	2.40	163.17	18%
Custodial FTE	50.88	5%	59.42	6%	(8.55)	60.65	7%
Maintenance FTE	210.00	21%	209.00	23%	1.00	209.00	23%
Exempt FTE	390.40	40%	360.57	39%	29.83	336.58	37%
<b>Total Central Services FTE</b>	<b>983.72</b>	<b>100%</b>	<b>915.16</b>	<b>100%</b>	<b>68.56</b>	<b>898.67</b>	<b>100%</b>
<b>Metro Continuing Education</b>							
Teaching FTE	6.60	21%	5.60	19%	1.00	5.60	17%
Support FTE	16.57	52%	15.03	50%	1.54	16.83	50%
Custodial FTE	0.69	2%	0.68	2%	0.01	1.83	5%
Exempt FTE	7.80	25%	8.80	29%	(1.00)	9.60	28%
<b>Total Metro Cont. Ed. FTE</b>	<b>31.66</b>	<b>100%</b>	<b>30.11</b>	<b>100%</b>	<b>1.55</b>	<b>33.86</b>	<b>100%</b>
<b>Total FTE's</b>	<b>8,710.39</b>		<b>8,793.59</b>		<b>(83.20)</b>	<b>8,318.78</b>	
<b>Total by Group</b>							
Teaching FTE	4,985.90	57%	4,882.48	56%	103.42	4,730.48	57%
Support FTE	2,236.14	26%	2,453.88	28%	(217.74)	2,185.32	26%
Custodial FTE	633.93	7%	638.95	7%	(5.02)	628.09	8%
Maintenance FTE	210.00	2%	209.00	2%	1.00	209.00	3%
Exempt FTE	644.42	7%	609.28	7%	35.14	565.88	7%
<b>Total FTE's</b>	<b>8,710.39</b>	<b>100%</b>	<b>8,793.59</b>	<b>100%</b>	<b>(83.20)</b>	<b>8,318.78</b>	<b>100%</b>

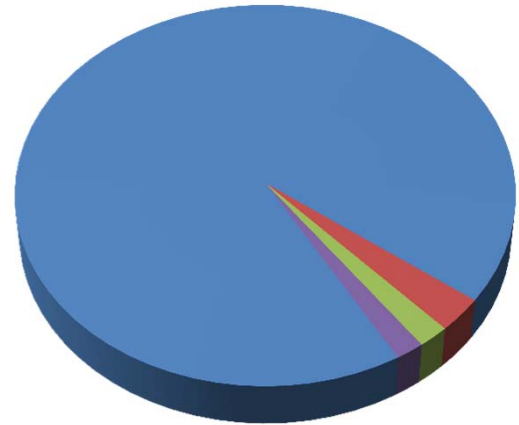
## Edmonton Public Schools - Revenue & Expense Analysis

### 2016-2017 Fall Revised Budget

#### Revenue by source

(all dollar amounts are expressed in thousands)

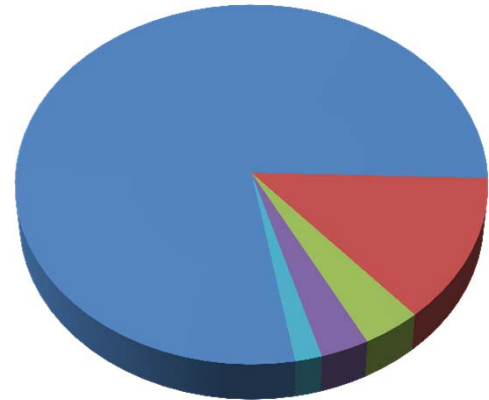
	2016-2017	
	\$	%
Government of Alberta	1,028,282	93.3%
Fees	31,978	2.9%
Sales and Services	20,907	1.9%
Other	19,272	1.8%
	<u>1,100,439</u>	<u>100.0%</u>



#### Expenses by block

(all dollar amounts are expressed in thousands)

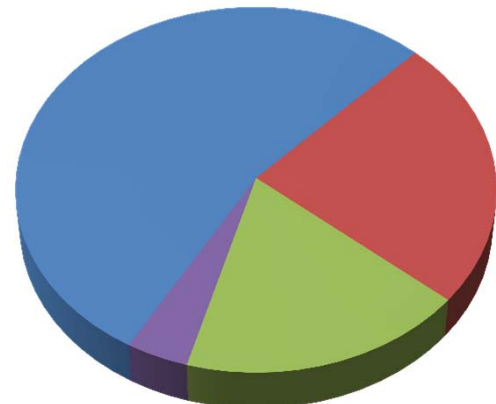
	2016-2017	
	\$	%
ECS - Grade 12 Instruction	908,621	78.2%
Plant Operations and Maintenance	152,180	13.1%
Transportation	43,942	3.8%
Board and System Administration	36,358	3.1%
External Services	20,090	1.7%
	<u>1,161,191</u>	<u>100.0%</u>



#### Expenses by object -

(all dollar amounts are expressed in thousands)

	2016-2017	
	\$	%
Certificated salaries, wages and benefits expense	625,579	54.0%
Non-certificated salaries, wages and benefits expense	277,497	23.9%
Services, contracts and supplies expense	212,009	18.3%
Amortization & other expenses	46,106	4.0%
	<u>1,161,191</u>	<u>100.0%</u>



## 3020 Edmonton School District No. 7

School Jurisdiction Code and Name

## FALL 2016 UPDATE TO THE 2016/2017 BUDGET: Page 1

	Fall 2016 Update to the Budget 2016/2017	Spring 2016 Budget Report 2016/2017	Variance	% Variance
<b>OPERATIONS (SUMMARY)</b>				
<b>Revenues</b>				
Alberta Education	\$1,025,238,650	\$1,015,480,550	\$9,758,100	1.0%
Other - Government of Alberta	\$3,042,800	\$3,073,500	(\$30,700)	-1.0%
Federal Government and First Nations	\$2,364,600	\$2,209,000	\$155,600	7.0%
Other Alberta school authorities	\$795,800	\$819,100	(\$23,300)	-2.8%
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	\$31,978,200	\$32,109,900	(\$131,700)	-0.4%
Other sales and services	\$20,907,200	\$21,248,800	(\$341,600)	-1.6%
Investment income	\$3,200,000	\$3,200,000	\$0	0.0%
Gifts and donation	\$6,040,700	\$5,425,900	\$614,800	11.3%
Rental of facilities	\$4,971,000	\$4,030,100	\$940,900	23.3%
Fundraising	\$1,900,000	\$1,888,100	\$11,900	0.6%
Gain on disposal of capital assets	\$0	\$0	\$0	0.0%
Other revenue	\$0	\$0	\$0	0.0%
Total revenues	\$1,100,438,950	\$1,089,484,950	\$10,954,000	1.0%
<b>Expenses By Program</b>				
Instruction - Early Childhood Services	\$67,006,922	\$66,712,002	\$294,920	0.4%
Instruction - Grades 1 - 12	\$841,613,888	\$811,583,714	\$30,030,174	3.7%
Plant operations and maintenance	\$152,179,978	\$148,310,642	\$3,869,336	2.6%
Transportation	\$43,941,843	\$42,180,446	\$1,761,397	4.2%
Board & system administration	\$36,358,529	\$33,947,057	\$2,411,472	7.1%
External services	\$20,089,805	\$19,263,732	\$826,073	4.3%
Total Expenses	\$1,161,190,965	\$1,121,997,593	\$39,193,372	3.5%
Annual Surplus (Deficit)	(\$60,752,015)	(\$32,512,643)	(\$28,239,372)	-86.9%
<b>Expenses by Object</b>				
Certificated salaries & wages	\$501,293,834	\$488,717,592	\$12,576,242	2.6%
Certificated benefits	\$124,285,449	\$121,372,391	\$2,913,058	2.4%
Non-certificated salaries & wages	\$219,483,571	\$224,169,783	(\$4,686,212)	-2.1%
Non-certificated benefits	\$58,012,981	\$59,567,640	(\$1,554,659)	-2.6%
Services, contracts and supplies	\$212,009,220	\$182,064,677	\$29,944,543	16.4%
Amortization expense - supported	\$35,137,207	\$35,137,207	\$0	0.0%
Amortization expense - unsupported	\$10,203,868	\$10,203,868	\$0	0.0%
Interest on capital debt - supported	\$0	\$0	\$0	0.0%
Interest on capital debt - unsupported	\$402,435	\$402,435	\$0	0.0%
Other interest and finance charges	\$362,400	\$362,000	\$400	0.1%
Losses on disposal of tangible capital assets	\$0	\$0	\$0	0.0%
Other expenses	\$0	\$0	\$0	0.0%
Total Expenses	\$1,161,190,965	\$1,121,997,593	\$39,193,372	3.5%
<b>Accumulated Surplus from Operations (Projected)</b>				
Accumulated Surplus from Operations - August 31, 2016	\$99,497,837	\$79,449,786	\$20,048,051	25.2%
Accumulated Surplus from Operations - August 31, 2017	\$50,487,088	\$46,937,143	\$3,549,945	7.6%
Capital Reserves - August 31, 2016	\$57,063,531	\$41,096,009	\$15,967,522	38.9%
Capital Reserves - August 31, 2017	\$45,963,531	\$44,924,961	\$1,038,570	2.3%
<b>Certificated Staff FTE's</b>				
School based	4,807.7	4,749.1	58.6	1.2%
Non-school based	178.2	133.4	44.9	33.6%
Total Certificated Staff FTE's	4,985.9	4,882.5	103.4	2.1%
<b>Non-Certificated Staff FTE's</b>				
Instructional	2,345.7	2,559.3	(213.6)	-8.3%
Plant operations & maintenance	908.9	897.4	11.5	1.3%
Transportation	17.8	17.8	-	0.0%
Other non-instructional	452.2	436.7	15.5	3.6%
Total Non-Certificated Staff FTE's	3,724.6	3,911.1	(186.5)	-4.8%

**Attestation of Secretary-Treasurer/Treasurer:**

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

# 3020 Edmonton School District No. 7

School Jurisdiction Code and Name

## FALL 2016 UPDATE TO THE 2016/2017 BUDGET: Page 2

	Fall 2016 Update to the Budget 2016/2017	Spring 2016 Budget Report 2016/2017	Variance	% Variance
<b>FEE &amp; SALES TO PARENTS &amp; STUDENTS</b>				
<b>Fees</b>				
Transportation	\$12,271,500	\$12,201,200	\$70,300	0.6%
Basic instruction supplies	\$1,697,200	\$1,659,600	\$37,600	2.3%
Technology user-fees	\$0	\$0	\$0	0.0%
Alternative program fees	\$170,000	\$0	\$170,000	100.0%
Fees for optional courses	\$2,892,700	\$2,900,953	(\$8,253)	-0.3%
Activity fees	\$6,450,000	\$6,935,506	(\$485,506)	-7.0%
ECS enhanced program fees	\$0	\$0	\$0	0.0%
Optional Material Fees	\$0	\$439,142	(\$439,142)	-100.0%
Kindergarten	\$570,000	\$0	\$570,000	100.0%
Other enhancement fees (describe here)	\$0	\$0	\$0	0.0%
Other enhancement fees (describe here)	\$0	\$0	\$0	0.0%
Other enhancement fees (describe here)	\$0	\$0	\$0	0.0%
Extra-curricular fees	\$3,440,000	\$3,341,876	\$98,124	2.9%
Non-curricular travel	\$0	\$0	\$0	0.0%
Lunch supervision fees	\$4,166,800	\$4,200,300	(\$33,500)	-0.8%
Non-curricular supplies and materials	\$320,000	\$431,323	(\$111,323)	-25.8%
Other non-curricular fees (describe here)	\$0	\$0	\$0	0.0%
Other non-curricular fees (describe here)	\$0	\$0	\$0	0.0%
Other non-curricular fees (describe here)	\$0	\$0	\$0	0.0%
Other non-curricular fees (describe here)	\$0	\$0	\$0	0.0%
Other non-curricular fees (describe here)	\$0	\$0	\$0	0.0%
Total fees	\$31,978,200	\$32,109,900	(\$131,700)	-0.4%
<b>Other Sales to Parents &amp; Students</b>				
Cafeteria sales, hot lunch, milk programs	\$924,500	\$1,291,669	(\$367,169)	-28.4%
Special events	\$1,608,100	\$1,346,713	\$261,387	19.4%
Sales or rentals of other supplies / services	\$1,304,600	\$1,293,880	\$10,720	0.8%
Out of district student revenue	\$0	\$0	\$0	0.0%
International and out of province student revenue	\$7,050,000	\$7,637,500	(\$587,500)	-7.7%
Adult education revenue	\$2,185,200	\$2,322,100	(\$136,900)	-5.9%
Preschool	\$0	\$0	\$0	0.0%
Child care & before and after school care	\$0	\$0	\$0	0.0%
Lost item replacement fees	\$293,800	\$401,981	(\$108,181)	-26.9%
Other sales (describe here)	\$0	\$0	\$0	0.0%
Other sales (describe here)	\$0	\$0	\$0	0.0%
Other sales (describe here)	\$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	\$13,366,200	\$14,293,843	(\$927,643)	-6.5%
<b>Grades 1 - 12</b>				
Eligible funded students - Grades 1 to 9	62,780.0	62,959.0	(179.0)	-0.3%
Eligible funded students - Grades 10 to 12	23,072.0	22,601.0	471.0	2.1%
Other students	599.0	750.0	(151.0)	-20.1%
Home ed and blended program students	414.0	395.0	19.0	4.8%
Total Enrolled Students, Grades 1-12	86,865.0	86,705.0	160.0	0.2%
<b>Early Childhood Services (ECS)</b>				
Eligible funded children - ECS	8,778.0	8,650.0	128.0	1.5%
Other children	-	-	-	0.0%
Program hours	475.0	475.0	-	0.0%
ECS FTE's Enrolled	4,389.0	4,325.0	64.0	1.5%

### Attestation of Secretary-Treasurer/Treasurer:

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

## 3020 Edmonton School District No. 7

School Jurisdiction Code and Name

### FALL 2016 UPDATE TO THE 2016/2017 BUDGET

#### Comments/Explanations of changes from original Spring 2016/2017 Budget Report:

##### Explain any changes in revenue or fee items >5% (any highlighted items in cells S10-S24 on Page 1 or cells S10 - S30 and S34 - S47 on Page 2):

Federal Government and First Nations - Fees for non-resident students are billed directly to First Nations bands and the remaining students are funded by the Federal Government. There was an increase in funding from LINC (Language Instruction for Newcomers).  
Gifts and Donations - These funds are restricted to support activities and programs at schools and are directly offset by related expenses. Schools typically don't fully budget for these in the spring, as there is uncertainty around these initiatives.  
Rental of Facilities - The increase is related to increased revenue for closed sites as a tenant took over an additional floor, as well there is an estimated increase in recoverable maintenance and upfit for tenant space in both open and closed schools.  
Alternative Program Fees and Activity Fees - The alternative program fee was inadvertently placed in the activity fees line in the Spring budget and this is now corrected.  
Optional material fees are included in fees for optional courses and Kindergarten fees are now broken out individually.  
Non-curricular supplies and materials have decreased based on actuals.  
Other Sales to Parents & Students for the most part have decreased over the Spring budget. Most of the amounts have been adjusted to reflect the actuals as at August 31, 2016.

##### Explain any changes in program expenses >5% (any highlighted items in cells S27-S32 on Page 1):

Board and System Admin increased by 7.1% due to access to surplus funds for various central initiatives that support schools.

##### Explain any changes in expenses by object >5% (any highlighted items in cells S37 - S48 of Page 1):

The increase in Services, contracts, and supplies expenses is mostly related to the distribution of surplus funds for initiatives that support schools.

##### Explain any changes in projected Accumulated Operating Surplus and Capital Reserves as at August 31, 2016 or August 31, 2017 by >5% (highlighted items in cell S52 to S55):

The accumulated surplus from operations as at August 31, 2016 is based on the Audited Financial Statements where the Spring budget was based on a forecast. We have an aggressive surplus plan, where \$61 million has already been released to Schools and Central in conjunction with the Fall 2016-2017 Budget. This plan includes an increase in allocation rates for our students identified as having severe special needs as well as our ELL students. As such a large portion of these surplus funds has been used to hire term FTE's, that are already in place for the current school year. In addition, surplus funds will be used to initiate a new multi-year plan which will address some of the facility inequities that currently exist at our schools from both a technology and a facility infrastructure point of view. This plan will require access to operating surplus funds of \$6.8 million in 2016-2017 and another \$10.5 million in 2017-2018.  
The accumulated surplus from operations as at August 31, 2017 is based on the planned use of surplus funds and the estimated surplus as at August 31, 2017.  
The capital reserve balance as at August 31, 2016 includes an actual transfer of \$20M from the operating surplus on August 31, 2016.

##### Explain change in total certificated staff >3% (if cell S58 or S59 on Page 1 is highlighted) or non-certificated staff >3% (if cell S63 - S66 on Page 1 is highlighted):

The non school based certificated staff increase is due to the central initiatives to support schools. These initiatives include items such as Provincial Curriculum Implementation, Literacy Practices and Implementations, and Math and Numeracy.  
The Spring 16/17 Budget is based on estimates and includes a budget holdback where estimated FTE's are calculated. The fall budget more accurately represents the actual changes in FTE's.  
The other non-instructional increase in FTE's is related to some central department reorganizations and support to schools through central initiatives.

##### Explain change in enrolment >3% (if cell S55 or cell S61 on Page 2 is highlighted):

#### Attestation of Secretary-Treasurer/Treasurer:

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