

School District Financial Planning

Multi-Year Financial Plans

April 21, 2023



Ministry of
Education and
Child Care

Objectives

- Opportunity for questions / clarifications
- Walk through sample multi-year financial plan (FP) sections
- Determine if school districts need additional supports to develop their FPs
- Provide some samples of school district FP alignment with FESL and strategic priorities



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Commonly Asked School District Questions

- What is the main purpose of a multi-year Financial Plan (FP)?
 - ✓ It is a multi-year planning tool that aligns resources and funding with school district priorities.
- How do I “align” my FP with the Framework for Enhancing Student Learning / strategic plan?
 - ✓ See slides 7 & 12-22.
- Where does FP development fit with the budget process?
 - ✓ See next slide and slide 6

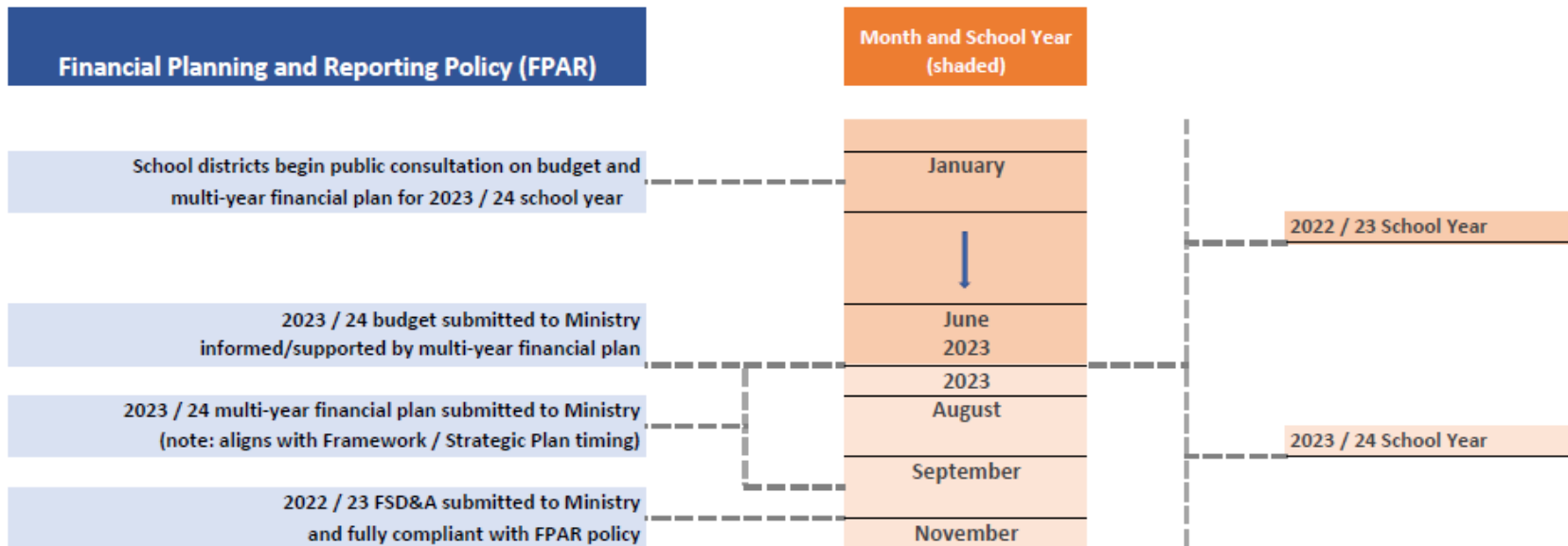


Commonly Asked School District Questions

- How can I do projections for two additional years if I don't know how much our operating grant will be?
 - ✓ You can use an Estimator Tool, tailored specifically to individual School Districts, found [here](#).
- How much detail is required; for example, if we identify specific priorities/strategies in our strategic plan do we provide the specific amount of funds for each in our FP?
 - ✓ No, that is the role of the budget, you can use a narrative style (slide 7)



Timelines



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Sample Outline of Financial Plan – District Overview

District Overview (all headings, etc., can link to already existing resources on public website to avoid duplication and enable brevity)

- Numbers of student
- Demographics

Board of Education/Council

- Roles, responsibilities
- Governance structure



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Sample Outline – Alignment

Strategic Plan / Priorities

- How financial resources support strategic priorities (e.g., student outcomes)
- For example, Strategic Priority #1 in Multi-Year Strategic Plan
 - Learning
 - How financial resources (now and projected) will support student learning (actions and narrative language, not budget items although can refer to budget as needed)

Sample Outline – Budget & Financial Plan Overview

Budget Development Overview / Financial Planning Framework

- How does the board create the Budget
- Consultation process

Current Year Budget / Financial Plan Overview

- Assumptions / change in financial circumstances/ cost drivers used in FP
- Staffing summary and changes

Sample Outline – Financial Projections

Multi-Year Financial Plan Projections

- Projected student enrollment trends
- Multi-year operating revenue/expenses
 - International Education Revenue
 - Staffing, supplies and services
- MY operating revenue and expense comparison
- MY operating surplus/deficit & estimated operating surplus



Sample Outline – Special & Capital Funds

Special Purpose Funds

- What are special purpose funds
- Funds designated for (e.g., Learning Improvement Fund, etc.)

Capital Fund Budget (link to CF documents)

- Brief overview
- Details as needed (e.g., buildings, fields, etc.)



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Sample Outline - Engagement

Summary of engagement with public, community partners etc. (including Indigenous populations)

- Consultation method
- Who was consulted?
- Feedback submitted
- How was / will feedback be addressed and incorporated (actions)
- How will boards report back to participants on results/actions (e.g., will post on website annually)



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Examples of Alignment – School District 79



BRITISH
COLUMBIA

Ministry of Education
and Child Care



School District Strategic Plan Supported by Operational Plans.

Click [here](#) to go to the SD79 website page that has the information on the right.

Download your own copy of ['Beyond Education'](#)

Our plan to turn our visionary Strategic Plan into reality is our [Strategic Plan Operations Plan](#)

Each of our work areas has created their own plan that aligns with our Strategic Plan Operations Plan. You can view those below:

- ▶ [Human Resources](#)
- ▶ [Operations](#)
- ▶ [Finance](#)
- ▶ [Communications](#)
- ▶ [Technology](#)

Of course, each of these plan work to support our learners. You can view our detailed district-wide [Framework for Enhancing Student Learning \(FESL\) 2022 / 2023](#)

Each school has their own plan on how to serve our learners. These plans align with the district-wide FESL and Beyond Education, you can find individual school FESLs below.

Elementary Schools

[Alex Aitken Elementary](#)



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Multi-year Strategic Plans



- Framework for Enhancing Student Learning Policy
 - Set, create and maintain and **multi-year strategic plan**
 - Educational priorities, objectives and strategies
- Enhancing Student Learning Order
 - Annually report on student outcomes
- Align with all **district operational plans**

SD 79 Strategic Plan



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Operational Plans



- Operational plans include:
 - financial plans
 - human resources plans
 - information technology plans
 - engagement and communication plans
 - Long-range facilities plans
- Plans to reflect and support the implementation of priorities, objectives, and strategies of the **multi-year strategic plan**

SD 79 Strategic Plan Operations Plan



LEARNING		Goal:
Objective	Established and Ongoing Actions	Actions
Enhance early learning opportunities and partnerships	<p>Provided opportunities to engage with the Early Learning Framework</p> <p>Changing Results for Young Learners project involvement (Community ECE, Strong Start educator and Kindergarten teachers)</p> <p>Maintain and enhance relationships with community partners and establish ongoing collaborative projects (Mother Goose, Roots of Empathy, Books for Babes, Literacy Rings, PLAY Cowichan)</p> <p>Support smooth transitions from home to school (Ready Set Learn & Ready Set Go, Community Transition Network)</p> <p>Strong Start BC programs (6 school based, Wendy's House, and Outreach)</p> <p>School District participation and coordination of the Cowichan Early Years Table</p> <p>Participate in EDI data collection and use results to inform program development</p> <p>CALM Curriculum Implementation Support</p>	<p>Develop competent, agile learners who are creative, critical and social thinkers that have the capacity to be global citizens</p> <p>Initiate a review of early learning partnerships (birth-8) throughout the Cowichan Valley with the intent to strengthen collective impact</p> <p>Initiate and co-create a universal touch point program, (Bright Beginnings) with community for ages birth to five with a focus on parent education about child development</p> <p>Create networks and opportunities to support childcare agencies in the Cowichan Valley School District facilities in the application of the Early Learning Framework</p> <p>Increase awareness of emotional literacy and strengthen strategies that support Social Emotional well-being</p> <p>Deepen family and community engagement in new and existing early years (birth-5) programs</p> <p>Deepen engagement with Gr K-3 teachers with the Early Learning Framework</p> <p>Strengthen effective pedagogy in oral language development including the use of evidence-based interventions (K-3)</p>

LEARNING

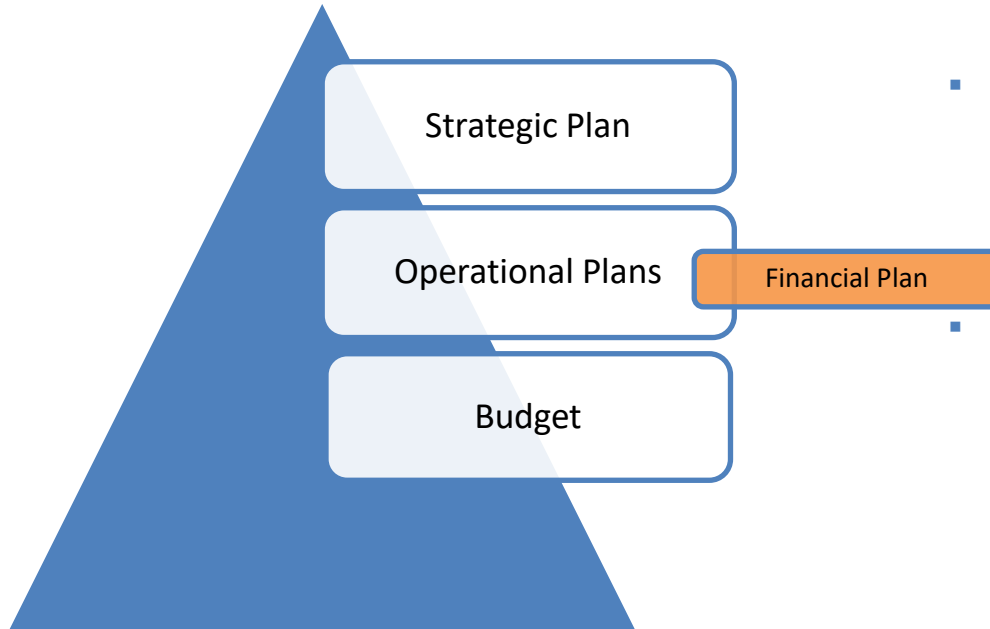
Goal:

Develop competent, agile learners who are creative, critical and social thinkers that have the capacity to be global citizens

Objective	Established and Ongoing Actions	Actions
<p>Enhance early learning opportunities and partnerships</p>	<p>Provided opportunities to engage with the Early Learning Framework</p> <p>Changing Results for Young Learners project involvement (Community ECE, Strong Start educator and Kindergarten teachers)</p> <p>Maintain and enhance relationships with community partners and establish ongoing collaborative projects (Mother Goose, Roots of Empathy, Books for Babes, Literacy Rings, PLAY Cowichan)</p> <p>Support smooth transitions from home to school (Ready Set Learn & Ready Set Go, Community Transition Network)</p> <p>Strong Start BC programs (6 school based, Wendy's House, and Outreach)</p> <p>School District participation and coordination of the Cowichan Early Years Table</p> <p>Participate in EDI data collection and use results to inform program development</p> <p>CALM Curriculum Implementation Support</p>	<p>Initiate a review of early learning partnerships (birth-8) throughout the Cowichan Valley with the intent to strengthen collective impact</p> <p>Initiate and co-create a universal touch point program, (Bright Beginnings) with community for ages birth to five with a focus on parent education about child development</p> <p>Create networks and opportunities to support childcare agencies in the Cowichan Valley School District facilities in the application of the Early Learning Framework</p> <p>Increase awareness of emotional literacy and strengthen strategies that support Social Emotional well-being</p> <p>Deepen family and community engagement in new and existing early years (birth-5) programs</p> <p>Deepen engagement with Gr K-3 teachers with the Early Learning Framework</p> <p>Strengthen effective pedagogy in oral language development including the use of evidence-based interventions (K-3)</p>



Financial Plans



- Financial Planning and Reporting Policy:
 - develop, implement and provide to the Ministry multi-year financial plans (FP)
- FP to reflect and support:
 - implementation of priorities, objectives, and strategies of the **multi-year strategic plan**
 - other **operational needs** of the school district



SD 79 Multi-Year Financial Plan



HOW FINANCE FITS INTO THE STRATEGIC PRIORITIES:

PRIORITIES

ACTIONS

Learning

- Focus budget resources on areas of student achievement;
- Ensure that the budget adequately funds learning including staffing and resources;
- Allocate resources that support inservice for all staff
- Ensure that resources can be aligned to the strategic priorities and student outcomes;
- Ensure that an adequate surplus contingency is maintained to support programs in years of funding challenges

Indigenous Ways of Knowing

- Additional support for Indigenous Learning with funding outside of the targeted Indigenous Grant;
- Support the creation of outdoor learning spaces

Culture of Care

- Ensure that the budget supports the needs of diverse learners;
- Support wellness initiatives for staff and students;

Future Focused Systems

- Adequately support the technology plan;
- Look for future opportunities to replace aging vehicles with electric;
- Continue to support classroom design innovation when replacing furniture with 21st century furniture



BRITISH
COLUMBIA

Ministry of Education
and Child Care



BEYOND EDUCATION

HOW FINANCE FITS INTO THE STRATEGIC PRIORITIES:

PRIORITIES

ACTIONS

Learning

- Focus budget resources on areas of student achievement;
- Ensure that the budget adequately funds learning including staffing and resources;
- Allocate resources that support inservice for all staff
- Ensure that resources can be aligned to the strategic priorities and student outcomes;
- Ensure that an adequate surplus contingency is maintained to support programs in years of funding challenges

Indigenous Ways of Knowing

- Additional support for Indigenous Learning with funding outside of the targeted Indigenous Grant;
- Support the creation of outdoor learning spaces

Culture of Care

- Ensure that the budget supports the needs of diverse learners;
- Support wellness initiatives for staff and students;

Future Focused Systems

- Adequately support the technology plan;
- Look for future opportunities to replace aging vehicles with electric;
- Continue to support classroom design innovation when replacing furniture with 21st century furniture



BRITISH
COLUMBIA

Ministry of Education
and Child Care

Thank you



EDUC.srsd@gov.bc.ca



Links to policies and support materials:

[Financial Planning & Reporting Policy](#)
[Accumulated Operating Surplus Policy](#)



BRITISH
COLUMBIA

Ministry of Education
and Child Care