

Education Funding

## **Technical Paper**

2009–10

Spring 2009  
Ministry of Education

This publication is available on the Ministry of Education's website at:  
<http://www.edu.gov.on.ca/fre/policyfunding/funding.html>.

Une publication équivalente est disponible en français sous le titre suivant : *Financement de l'éducation : Document technique 2009-2010, printemps 2009.*

ISBN: 978-1-4249-9623-0 (PDF)

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# Introduction

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## Purpose

This paper contains details of the grant formulas and other criteria for education funding through the Grants for Student Needs (GSN) for the 2009–10 school year. It is intended to provide an overview of the formulas that are used to calculate school boards' 2009–10 allocations for budgeting and financial reporting purposes.\*

The grant formulas outlined in this paper are based on the following regulations: *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year*, *Calculation of Average Daily Enrolment for the 2009-2010 School Board Fiscal Year*, and *Calculation of Fees for Pupils for the 2009-2010 School Board Fiscal Year*.\*\*

## Changes for 2009–10

A summary of the changes in the 2009–10 education funding approach is outlined below. Further details are provided in the relevant sections of this paper.

In 2009–10, funding to school boards through the GSN is projected to be \$19.78 billion. The \$19.78 billion represents an increase of \$592 million over the Revised Estimates for the 2008–09 school year.

The 2009–10 GSN focuses on four areas:

- *support for increased staffing under the Provincial Framework Agreements (PFAs)*  
These staffing improvements will help boards provide better programs for students in safer and healthier learning and working environments. As part of the Government's support for the PFAs, there is also funding for compensation increases for all staffing categories.

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\* An addendum to this document provides the applicable benchmarks and formulae to support the Provincial Framework Agreement (PFA) negotiated between the Elementary Teachers' Federation of Ontario (ETFO) and the Ontario Public School Boards' Association (OPSBA).

\*\* Should there be any discrepancy between this paper and the regulations, the regulations prevail.

- *funding to address cost increases in three key areas: community use of schools, student transportation, and school operations*  
There will also be funding to increase the management capacity of boards through an initiative to develop an internal audit function.
- *funding to increase special education*  
The High Needs Amount is projected to be \$1 billion to support programs and additional supports for students with high needs. The Ministry will change the way this funding is allocated, as recommended by the Special Education Working Table, from an allocation based on the number of “identified” students to one based on population indicators.
- *measures to constrain funding for textbooks, computers, professional development, and transportation*  
There are also important changes to the Declining Enrolment Adjustment in 2009–10 and, starting in 2010–11, to top-up funding for school operations and renewal, and funding for board administration.

In addition, starting in the 2009–10 school year, the formula-based Parent Engagement funding will be transferred into the GSN.

The Community Use of Schools Grant is being moved to the Schools Operations Allocation of the Pupil Accommodation Grant.

The Outreach Coordinators component of Community Use of Schools is being transferred out of the GSN to link it more directly to the recruitment and hiring of Outreach Coordinators.

## **Enhancements for Peace and Progress in Education**

In 2009–10, the Government will continue to fund its multi-year commitment to support the PFAs\* with a projected \$570 million in additional funding:

- *\$5.3 million for enhanced student supervision*  
In this second year of a four-year enhancement to support changes to the number of supervision minutes per elementary teacher, funding for student supervision in elementary schools will increase by \$5.3 million in 2009–10. This will be done through an increase of \$4.38 to the benchmark of \$22.23 that was introduced in the Pupil Foundation Grant in 2008–09.

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\* The *Technical Paper* reflects the majority of the PFAs. Please refer to the Addendum (p. 137) for details related to the PFA between ETFO and OPSBA.



- \$11.3 million for expanded secondary programs with an additional 129 secondary teacher positions*

Increased funding will provide 129 additional secondary teachers to support locally developed strategies to expand secondary programming over five years. This increase of \$11.3 million will provide 0.19 additional teacher per 1,000 secondary students, building on the 0.19 teachers added in 2008–09. It is projected that, at full implementation in 2012–13, this investment will have provided funding for 891 new secondary teaching positions.
- \$8.8 million for increased support for professional learning for elementary teachers*

Elementary teaching staff will benefit from \$8.8 million for professional learning, which will be implemented through an increase in the Pupil Foundation Grant benchmark of \$7.24 per elementary student. This is the first year of a three-year commitment to enhance funding for professional learning.
- \$46.9 million for 555 more elementary specialist teacher positions*

In 2009–10, \$46.9 million funds an additional 555 elementary specialist teaching positions and supports 10 additional minutes of prep time per week by adding 0.42 additional teacher per 1,000 elementary students to the Pupil Foundation Grant. This enhancement is the first year in a new four-year commitment through the PFAs. Funding for elementary specialist teachers has been added to the GSN each year since 2005–06.
- \$10.7 million for an additional 126 elementary teacher positions to reduce Grades 4 to 8 class sizes*

To support class size reductions in Grades 4-8 over four years starting in 2009–10, funding of \$10.7 million for 0.18 additional teacher per 1,000 Grade 4 to 8 student will be added to the Pupil Foundation Grant.
- \$36.3 million for 593 additional custodian positions*

Additional funding for a safer, cleaner learning environment will be allocated through an increase in the school operations benchmark cost per square metre of \$1.41. This increase will provide \$36.3M in new funding in 2009–10 and is projected to fund 593 additional FTE custodial positions.
- \$25.9 million for 400 more professional and paraprofessional staff*

Support in the Pupil Foundation Grant for professional and para-professional staff who provide direct services to students with special needs and to at-risk students will be enhanced by \$25.9 million to fund 400 more staff – an additional 0.33 staff per 1,000 elementary students.
- \$10.3 million for 211 additional elementary school office support staff positions*

An increase in funding of \$10.3 million for 211 more elementary school office positions, supporting an increased adult presence in schools, will be allocated through the elementary component of the School Foundation Grant. All elementary schools with 250 or more students will benefit from the enhancement. Elementary schools

with 1,000 or more students will receive funding for at least an additional 0.25 FTE office support worker (based on the benchmark salary and benefits), while incremental funding for the schools with at least 250 but fewer than 1,000 students will be based on school enrolment,

- *compensation increases*

To support peace and progress in education, the province will fund the costs of new salary benchmarks that reflect the various PFAs. This funding includes an additional \$411.7 million for all salary and benefits for all staff and \$2.8 million for improved working conditions for continuing education and international languages instructors.

## **Enhancements to Keep up with Costs**

### **Community Use of Schools**

In 2009–10, the Government will fund \$0.5 million to cover the retroactive cost pressures of inflation (labour and energy) since the program started.

### **School Operations**

To assist boards in managing the increases in energy (natural gas, electricity) and other costs, the Government will provide \$14.1 million in 2009–10 for a 2 percent cost benchmark update to the school operations benchmark. This funding is in addition to the increased funding for school operations under the PFAs, described above, to support the hiring of more custodians.

### **Student Transportation**

The Government will provide \$10.7 million in 2009–10 to fund a 2 percent cost benchmark update and other operating costs for student transportation. In addition, a Fuel Escalation/De-Escalation Clause will be added to the funding formula. This clause will help provide boards with additional funding stability despite the volatility of fuel prices.

Funding for student transportation in 2009–10 will be subject to constraints that provide stronger incentives for transportation consortia to achieve greater efficiencies. These incentives are described below (p. 8).

### **Audit Capacity**

As school boards collectively manage budgets that total more than \$19 billion annually, the Government will support an increased focus on financial transparency and accountability.

Many boards do not have an internal audit function to review and provide advice and recommendations on financial matters and risk management activities. In addition, most boards do not have an audit committee to provide a clear oversight of the policies and administrative/financial controls of the board.

The Government will provide \$2 million in 2009–10 to help boards establish internal audit functions. This funding will grow to \$5 million annually in subsequent years. Boards will also be encouraged to establish audit committees with external representation to oversee the overall controls and effectiveness of the board process and procedures. This is an area of improvement identified during the operational reviews undertaken so far. The Ministry will provide more information and direction about audit committees and their composition, and will also consult with the sector on the best approach in implementing internal audit functions.

### **Special Education**

The Ministry continues to implement the recommendations of the Working Table on Special Education by reviewing and refining the components of the Special Education Grant and consulting with stakeholders to ensure that the evolution of the funding approach supports students with special needs, improves student outcomes, and places less emphasis on the identification process for students with high needs.

In a period of fiscal restraint, the Government will again enhance funding to support the special education needs of students, with an increase of approximately \$49 million in the Special Education Grant for the 2009–10 school year. This is an increase of approximately \$627 million, or 39 percent, since 2002–03.

As the evolution of the special education funding approach continues, this \$49 million investment will support the transitional high needs funding levels for school boards, will ensure the availability of funding supports for the highest needs students, and will continue to support the provision of special education equipment.

For 2009–10, the Ministry will:

- provide funding stability for school boards by maintaining 95 percent of school boards' High Needs Amount (HNA) allocation unchanged,
- introduce measures of variability (MOV) to allocate the other 5 percent of the HNA allocation, which will better reflect the variability in the distribution of high needs students among school boards,
- recognize and support growth in the Special Incidence Portion (SIP) and Special Education Amount (SEA) claim-based applications, and
- stabilize support for education programs for school-aged children and youth in government-approved care and/or treatment, custody and correctional facilities.

## Efficiency and Savings Measures, 2009–10 and 2010–11

### School Renewal Funding in 2009–11

The memorandum of October 23, 2008, *2008: B13 – Constraint on School Renewal Funding in 2008-09*, advised boards that funding for school renewal activity through components of the School Renewal Allocation would be limited to 80 percent of the funding levels originally projected. This constraint applied only to the 2008–09 school year and will not apply in 2009–10.

For 2009–10, the benchmarks for renewal cost per metre squared will be:

Renewal Cost	2009–10 Benchmark (per m <sup>2</sup> )
Elementary and Secondary – less than 20 years old	\$7.03
Elementary and Secondary – more than 20 years old	\$10.54

These benchmarks affect the School Renewal Allocation formula amount and the calculation of Regular, Rural Schools, and Supported Schools Top-up funding.

The 20 percent constraint on the School Renewal enhancement amount, which is provided as a table in the GSN regulation, has therefore been removed in 2009–10.

### Managing Constraint

In the 2009 Ontario Budget, the Government affirmed its commitment to education as an investment in the Province's economic and social future. The Province and publicly funded school boards have worked together to make effective use of the significant funding increases that the Government has provided since 2002–03. Careful management has supported the excellent progress we have made in strengthening the education system and advancing our common goal of improved achievement for all students.

In the current economic and fiscal environment, continued strong financial management will be even more vital to sustaining and advancing progress in education. The education sector is well positioned to respond to this challenge. In recent years, the Ministry has worked with boards on a number of initiatives to build the system's capacity to manage education resources. These initiatives include the operational reviews to strengthen management capacity in non-academic operations and highlight and lever successful business practices, the student transportation reforms, and the establishment of the Expert Panel on Capital Standards.

In identifying changes to the GSN for the purposes of constraint, the Ministry has focused on areas where school boards are positioned to find efficiencies. However, boards have the flexibility to adjust their operations to meet the constrained revenue base within the current enveloping requirements of the GSN regulations.

**Constraint Measures Starting in 2009–10**

- **Textbooks:** an ongoing reduction of \$25 million in the annual funding provided through the Pupil Foundation Grant, implemented through the Textbooks and Learning Materials component of the Pupil Foundation Grant.

To maximize purchasing power and offset at least a portion of this reduction, the Ministry will work with boards to develop a centralized procurement strategy for textbooks and learning materials, similar to that used for the recent elementary school Library Investment Project.

This reduction will be implemented through a change in the Textbooks and Learning Materials benchmarks in the Pupil Foundation Grant. The revised benchmarks are:

Amount Per Pupil	
Elementary	\$69.00
Secondary	\$92.29

- **Classroom Computers:** a two-year reduction of \$25 million in the annual funding provided through Classroom Computers component of the Pupil Foundation Grant. This reduction will apply in the 2009–10 and 2010–11 school years only.

This reduction will be implemented through a change in the Classroom Computers benchmarks in the Pupil Foundation Grant. The revised benchmarks are:

Amount Per Pupil	
Elementary	\$34.52
Secondary	\$45.03

- **Staff Development:** a one-time reduction of \$44 million in staff development funding, through the Pupil Foundation Grant, and two special purpose grants – the Special Education Grant and the Learning Opportunities Grant.

In 2010–11, \$21.5 million of this funding will be restored to the Pupil Foundation Grant only.

- **Declining Enrolment Adjustment (DEA):** the recent report of the Declining Enrolment Working Group, *Planning and Possibilities*, has highlighted the need for boards to proactively manage the impact of declining enrolment on their finances and operations. The purpose of the DEA is to provide transitional funding to support boards as they adjust their costs to adapt to the lower revenues resulting from enrolment decline.

The DEA's design was based on the recommendation of a 2002 expert working group, which estimated that boards could manage a year-over-year rate of decline in operating revenues equal to 58 percent of the rate of decline in enrolment.

Starting in 2009–10, the DEA will be modified to better recognize that costs funded through the Pupil Foundation Grant (including teachers, textbooks, computers) can be quickly adjusted, while the adjustment of other costs may require more time:

- the scaling factor (that adjusts the allocation based on the specific percentage enrolment decline) will be eliminated and the calculation of the allocation will be based entirely on revenue change,
- 13 percent of the revenue change in the Pupil Foundation Grant will be recognized,
- 100 percent of the revenue change in other allocations (SEPPA, School Operations, Remote and Rural, Board Administration and FFL) used in the calculation of DEA will be recognized, and
- funding in the third year of transitional support will be 5 percent of the first year grant.

These changes will reduce the DEA by \$5.8M in 2009–10 and future years, depending on the nature of enrolment change.

- **Student Transportation:** Since the introduction of student transportation reforms in 2006, the Province has seen significant progress toward the goal of having all boards deliver student transportation services through consortia. There have been noteworthy gains in areas such as management capacity, route planning, and the use of technology. Through initiatives such as the Effectiveness and Efficiency (E&E) reviews and the 2007 Student Transportation Cost Study, the Ministry and boards have acquired information about costs to better inform funding decisions.

There will be a 2 percent cost benchmark update for student transportation in 2009–10. There will also be changes to the allocation of the Student Transportation Grant to promote efficiencies and realize some of the savings from the transportation reforms:

- The Ministry is setting a goal of an annual 1 percent routing reduction to be achieved in each of the three consecutive years starting in 2009–10. There will be an annual 1 percent reduction in the student transportation allocation to all boards, except boards that received a "High" rating on routing and technology through the E&E reviews. Boards that have already achieved a "High" rating will be exempt from the reduction beginning in 2009–10. Boards that achieve a "High" rating in 2009–10 or 2010–11 will be exempt from the reduction starting the year that follows the review.
- A majority of boards have reported transportation surpluses since the implementation of transportation reforms. In 2009–10, the 2 percent cost benchmark update will be netted against any reported transportation surplus from a board's 2008–09 Financial Statements.

### **Constraint Measures Starting in 2010–11**

The Ministry will introduce the following savings initiatives in 2010–11:

- **Student Transportation:** Another change will take effect in 2010–11. For the past six years, there has been no decrease in boards' transportation funding as a result of declining enrolment, although boards where enrolment is increasing have received the increases for which they were eligible. Starting in 2010–11, this transition support will be provided for only 50 percent of any funding decrease resulting from enrolment decline.
- **School Renewal and Operations Top-up Funding:** For school facilities that are not full, boards currently receive top-up funding that provides an amount equal to the funding that would be generated by an additional 20 percent of capacity, to a maximum of 100 percent (a full school facility). In 2010–11, this top-up funding will be reduced to 18 percent, and will be further reduced to 15 percent in 2011–12. This will not impact top-up funding provided to schools deemed Rural, Distant or Supported.

Beginning in 2010–11, top-up funding will not be provided to new schools, including schools opened in the 2009–10 school year. This recognizes that new schools can operate more efficiently and have fewer renewal needs.

- **Board Administration:** There will be a reduction in funding for board administration beginning in 2010–11.

## Programs Transferred into the GSN

### Parent Engagement

Since 2005–06, the Province has provided Parent Engagement funding to support school boards in the implementation of a wide range of policies, programs, strategies and initiatives to involve parents. The Ministry has allocated \$3.1 million annually based on the following formula:

$$\$5,000 + \$0.17 \text{ per student for board parent involvement committee} + \$500 \text{ per school council}$$

This funding is being transferred into the GSN and a Parent Engagement Component has been added to the Board Administration Component of the School Board Administration and Governance Grant.

## Programs Transferred out of the GSN

### Outreach Coordinators, Community Use of Schools

Funding for Outreach Coordinators was introduced as part of the 2008–09 GSN to help ensure the effectiveness and sustainability of local Community Use of Schools (CUS) programs.

In addition to working with existing groups that currently use school facilities under CUS, Outreach Coordinators are expected to form partnerships with other school boards, municipalities, social service agencies, and others. Starting in 2009–10, this \$6.4 million in funding will be provided as program funding outside the GSN in order to link it more directly to the recruitment and hiring of Outreach Coordinators.

As recommended by the Declining Enrolment Working Group, boards will be encouraged to identify under-utilized schools that would provide opportunities for engaging community partners. Outreach Coordinators will be an important resource for supporting the shared use of schools as well as evening and week-end community use of schools.



## **School Authorities**

Funding for school authorities is being adjusted in 2009–10 to reflect changes in funding to district school boards. Further details will be provided in the near future.

## **Investments Outside the GSN**

In 2009–10, the Government continues to support other important initiatives with investments outside the GSN. Further information about 2009–10 funding outside the GSN will be provided in the near future.

## **Further Information**

If you have any questions about the material in this paper, please contact your Ministry of Education regional office finance officer or the following branches of the Ministry:

Capital Programs Branch	(416) 325-4242
Capital Policy Branch	(416) 325-1704
Education Finance Branch	(416) 325-8407
School Business Support Branch	(416) 325-9243
Transfer Payments and Financial Reporting Branch	(416) 314-3711

## Education Funding Grants

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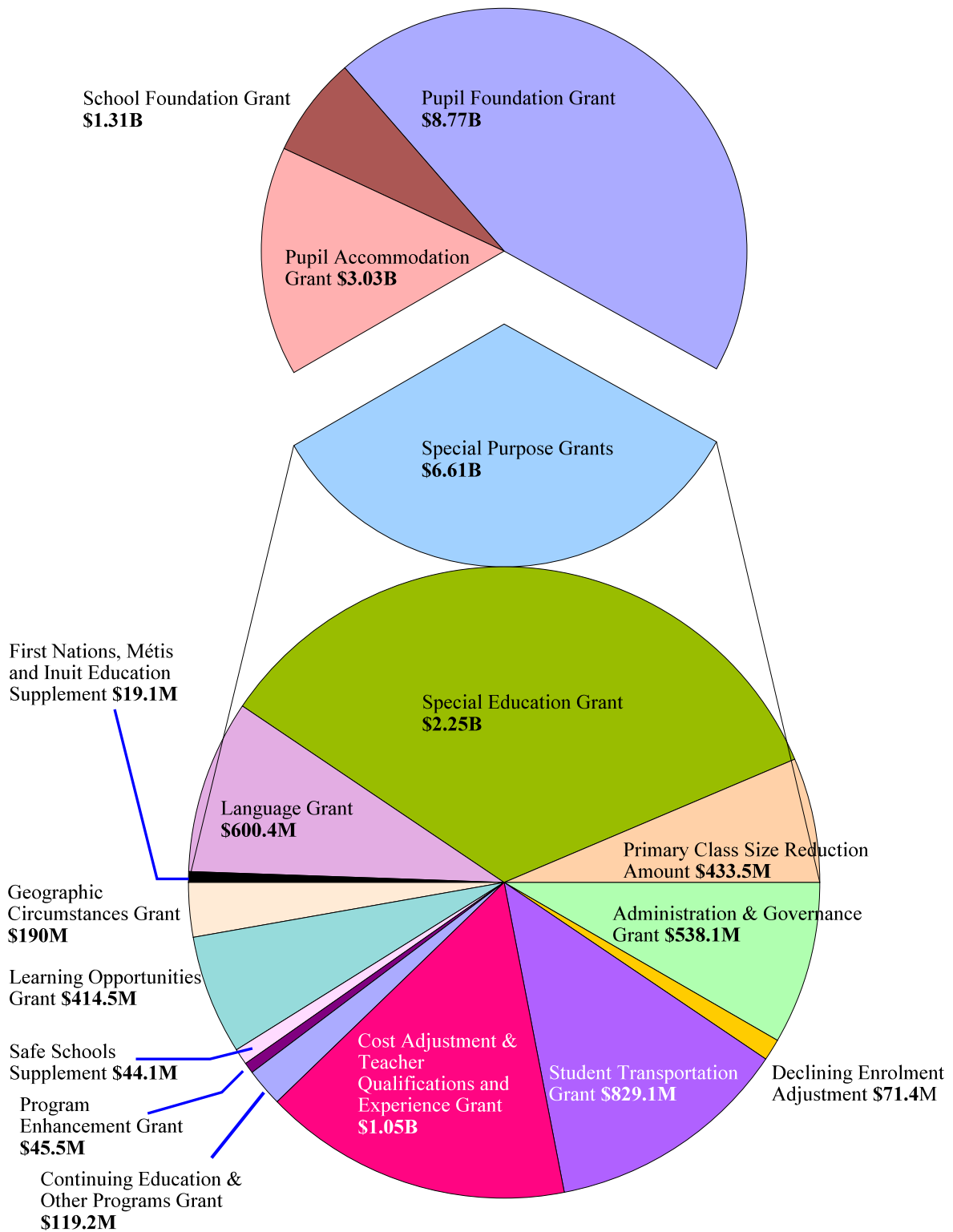
Education funding in 2009–10 consists of a Pupil Foundation Grant, a School Foundation Grant, thirteen special purpose grants, and a Pupil Accommodation Grant as summarized below.

		<b>Projected funding in 2009–10* (\$ Million)</b>
<b>PUPIL FOUNDATION GRANT</b>	Classroom teachers	
	Education assistants	
	Textbooks and learning materials	
	Classroom supplies	
	Classroom computers	
	Library and guidance services	\$8,766.0
	Specialist teachers (including preparation time)	
	Student Success teachers (including preparation time)	
	Professional and para-professional supports	
	Classroom consultants Professional development/learning	
<b>SCHOOL FOUNDATION GRANT</b>	Principals	
	Vice-principals	
	Secretaries	\$1,314.9
	School office supplies	
<b>SPECIAL PURPOSE GRANTS</b>	1. Primary Class Size Reduction Amount	
	2. Special Education Grant	
	3. Language Grant	
	4. First Nations, Métis, and Inuit Education Supplement	
	5. Geographic Circumstances Grant	
	6. Learning Opportunities Grant	
	7. Safe Schools Supplement	
	8. Program Enhancement Grant	\$6,608.7
	9. Continuing Education and Other Programs Grant	
	10. Cost Adjustment and Teacher Qualifications and Experience Grant	
	11. Student Transportation Grant	
	12. Declining Enrolment Adjustment	
	13. School Board Administration and Governance Grant	
<b>PUPIL ACCOMMODATION GRANT</b>	1. School Operations	
	2. School Renewal	
	3. New Pupil Places	
	4. Primary Class Size Reduction Capital	
	5. Growth Schools	\$3,032.5
	6. Capital Transitional Adjustment	
	7. Prohibitive to Repair	
	8. Capital Priorities	
	9.. Prior Capital Commitments	

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\* Excludes unallocated funding (\$10 million) and school authorities funding (\$52.7 million)

## 2009–10 Grant Allocations\* (Projections)



\* Excludes \$52.7 million for school authorities and \$10 million in unallocated funding.



## **Pupil Foundation Grant\***

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The Pupil Foundation Grant is a per-pupil allocation that supports the elements of a classroom education that are required by, and generally common to, all students.

For 2009–10, funding through the Pupil Foundation Grant is projected to be \$8.77 billion.

The \$8.77 billion includes increases to the salary benchmarks in accordance with the 2008–12 PFAs.

### **Salary and Benefits Benchmarks**

To meet the commitments of the 2008–12 PFAs, the salary benchmarks for teaching and non-teaching staff are increasing for 2009–10. The 2008–12 PFAs are in effect until August 31, 2012.

### **Benefits Benchmarks**

The benefits benchmarks for teaching and non-teaching staff remain unchanged.

### **Professional and Para-Professional Support**

An investment of \$25.9 million is being made to fund an additional 400 FTE positions across the province to provide increased direct services to elementary students who are at risk and/or have special needs.

### **Elementary Specialist Teachers**

Elementary specialist teachers provide instruction in subject areas such as literacy and numeracy, physical education, music, the arts, French, and anglais.

The 2009–10 increase in specialist teacher positions is being implemented through an increase in funded preparation time, and the number of specialist teachers added each year is in accordance with the additional minutes of preparation time agreed to in the 2008–12 PFAs.

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\* For details of the ETFO/OPSBA PFA, (which effects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

In 2009–10, an enhancement of \$46.9 million for a 10-minute per week increase in elementary preparation time to 210 minutes per week will provide funding for 555 more elementary specialist teacher positions.

The additional teachers funded as a result of the elementary specialist teachers initiative are recognized in calculating the Cost Adjustment and Teacher Qualifications and Experience Grant. Funding to boards is adjusted to reflect the costs of the additional teachers according to the teachers' placement on the salary grid.

### **Secondary Programming**

An investment of \$11.3 million to expand secondary programming will fund an additional 129 secondary teacher positions over four years.

### **Elementary Supervision**

To support changes to the number of supervision minutes per elementary teacher funding for student supervision in elementary schools will increase by \$5.3 million in 2009–10.

### **Professional Learning**

An investment of \$8.8 million will provide funding for increased professional learning for elementary teaching staff.

### **Grade 4 to 8 Class Size Reduction**

To support class size reductions in Grades 4 to 8 over four years starting in 2009–10, an investment of \$10.7 million has been added to the Pupil Foundation Grant which will fund 126 Junior and Intermediate Division teachers.

## **Constraint Measures Starting in 2009–10**

### **Textbooks and Learning Materials**

There will be a permanent reduction of \$25 million in the annual funding provided through the Textbooks and Learning Materials component. Textbook funding through the Special Purpose Grants will not be affected.

To maximize purchasing power and offset at least a portion of this reduction, the Ministry will work with school boards to develop a centralized procurement strategy for textbooks and learning materials, similar to that used for the recent Elementary School Library Investment program.

### **Classroom Computers**

There will be a two-year reduction of \$25 million in the annual funding provided through the Classroom Computers component. This reduction will apply in the 2009–10 and 2010–11 school years only.

### **Staff Development**

There will be a one-time reduction of \$44.5M in annual funding for staff development in 2009–10 through the Pupil Foundation Grant and three special purpose grants: the Special Education Grant, and the Learning Opportunities Grant.

In 2010–11, the Pupil Foundation Grant portion of this constraint will be restored.

## **Description of Pupil Foundation Grant Components**

### **Classroom Teachers**

Salaries and benefits for classroom teachers, elementary specialist teachers, secondary Student Success teachers, secondary programming teachers, supply and occasional teachers, and professional development for teachers.

Additional funding for classroom teachers is recognized through the Cost Adjustment and Teacher Qualifications and Experience Grant.

### **Education Assistants**

Salaries and benefits for education assistants who support teachers in the classroom.

### **Elementary Supervision**

Funding for student supervision in elementary schools

### **Professional Learning**

Funding for professional learning opportunities for elementary teachers.

### **Textbooks and Learning Materials**

Textbooks, workbooks, resource materials, updating library materials, instructional software, CD ROMs, DVDs, internet expenses, and technology supporting distance education.

### **Classroom Supplies**

Classroom supplies, such as paper, pens, pencils and other materials, and classroom equipment.

### **Classroom Computers**

Classroom computers (hardware only) and the associated network costs.

### **Library and Guidance Services**

Salaries and benefits for teacher-librarians and guidance teachers.

Guidance teachers at the elementary level are those providing guidance primarily to Grades 7 and 8 pupils.

### **Professional and Para-professional Services**

Salaries and benefits for staff who provide support services to students and teachers, such as attendance counsellors, lunchroom supervisors, hall monitors, social workers, child/youth workers, community workers, and computer technicians.

Professionals and para-professionals who provide support for special education, such as psychologists, psychometrists, and speech pathologists, are funded through a combination of the Pupil Foundation Grant and the Special Education Grant and other special purpose grants.

### **Classroom Consultants**

Salaries and benefits for teacher consultants and coordinators such as reading specialists and program specialists who assist teachers in developing curriculum or in working with individual students.

### **Grades 4 to 8**

Funding for teachers to support class size reductions in Grades 4 to 8.



<b>Pupil Foundation Grant – ELEMENTARY</b>	<b># staff per 1,000 ADE</b>		<b>benchmark salary + % benefits</b>	<b>\$ per ADE for supplies and services</b>	<b>\$ allocation per ADE</b>
Classroom Teacher Class size 24.5:1	Classroom Teacher	40.82	68,695 + 11.34%	\$119.42	\$3,122.12
	Specialist Teacher/ Preparation Time	6.64			\$507.86
	Supply Teacher				\$119.42
	Staff Development*				\$119.42
Education Assistants		0.20	34,379 + 24.00%		\$8.53
Elementary Supervision				\$26.61	\$26.61
Professional Learning				\$7.24	\$7.24
Textbooks and Learning Materials				\$69.00	\$69.00
Classroom Supplies				\$82.82	\$82.82
Classroom Computers				\$34.52	\$34.52
Library and Guidance Services	Teacher-Librarian	1.31	68,695 + 11.34%		\$100.04
	Guidance Teacher	0.20			\$15.30
Professional/Para-Professional Supports		1.73	54,385 + 19.00%		\$111.96
Classroom Consultants		0.48	94,564 + 11.10%		\$50.43
<b>TOTAL</b>		<b>51.38</b>		<b>\$339.61</b>	<b>\$4,255.85</b>

Note: Pension plan contributions for teachers and eligible members of OTPP are matched by the Government and are not included in the benchmark salaries and benefits.

See the Addendum, p. 137, for amounts related to the ETFO/OPSBA Provincial Framework Agreement.

\* One-time constraint in 2009–10; funding to be restored in 2010–11.

### Grade 4 to 8 Class Size Reduction

Pupil Foundation Grant – Grade 4 to 8 Class Size Reduction	# staff per 1,000 Grade 4–8 ADE		benchmark salary + % benefits	\$ per ADE for supplies and services	\$ allocation per ADE
<b>TOTAL</b>	Classroom Teacher	0.18	68,695 + 11.34%		\$13.77

<b>Pupil Foundation Grant – SECONDARY</b>		<b># staff per 1,000 ADE</b>	<b>benchmark salary + % benefits</b>	<b>\$ per ADE for supplies and services</b>	<b>\$ allocation per ADE</b>
Classroom Teacher Class size 22:1	Classroom Teacher	42.61	68,695 + 11.34%		\$3,259.03
Credit load per pupil 7.5	Student Success Teacher/Preparation Time	15.15			\$1,158.75
	Secondary Programming	0.38			\$29.06
	Supply Teacher			\$87.35	\$87.35
	Staff Development*				
	Department Head allowances	9.00	4,397 + 11.34%		\$44.06
Textbooks and Learning Materials				\$92.29	\$92.29
Classroom Supplies				\$188.87	\$188.87
Classroom Computers				\$45.03	\$45.03
Library and Guidance Services	Teacher-Librarian	1.10	68,695 + 11.34%		\$84.13
	Guidance Teacher	2.60			\$198.86
Professional/Para- Professional Supports		2.21	54,385 + 19.00%		\$143.03
Classroom Consultants		0.54	94,564 + 11.10%		\$56.73
<b>TOTAL</b>		<b>64.59</b>		<b>\$413.54</b>	<b>\$5,387.19</b>
	<b>(excluding Department Heads)</b>				

Note: Pension plan contributions for teachers and eligible members of OTPP are matched by the Government and are not included in the benchmark salaries and benefits.

\* One-time constraint in 2009–10; funding to be restored in 2010–11.



## School Foundation Grant

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The School Foundation Grant supports the costs of in-school administration and leadership (salaries and benefits for principals, vice-principals, and office support staff), as well as supplies for school administration purposes.

In 2009–10, in accordance with the PFAs, there will be an investment of \$10.3 million for additional office support staff in elementary schools funding an additional 211 FTE positions across the province.

School boards continue to be responsible for decisions regarding the allocation of in-school administration staff to schools.

The total School Foundation Grant is projected to be \$1.31 billion in 2009–10.

### **Definition of a *school* for the purposes of the School Foundation Grant**

The following criteria are used to define a *school* and its eligibility for generating School Foundation Grant funding.

***Single campus*** – a facility or collection of facilities operated by the same board that are on the same site

***Single program*** – a facility or collection of facilities operated by the same board that form a single program

***Grouped facilities and/or programs*** – where multiple facilities and/or programs are grouped to form a school for the purposes of the School Foundation Grant, the school is identified as:

- an *elementary school* if all the facilities and/or programs offer elementary-level instruction
- a secondary school, if all the facilities and/or programs offer secondary-level instruction
- a *combined school*, if the facilities and/or programs in the group offer a combination of elementary and secondary instruction (for example, Grades 7 and 8 with Grades 9 to 12)

A combined school is treated as a secondary school for the purpose of funding. In addition, any combined school with more than 300 elementary students and more than 500 secondary students receives funding for one additional full-time equivalent (FTE) principal.

A board's School Foundation Grant is the sum of the allocations for each of its eligible schools.

The allocation for each eligible school is a combination of:

***(a) base funding***

- funding for a principal and a school secretary is allocated for each school with an average daily enrolment (ADE) of 50 or more. Schools with an ADE of 1 to 49 receive funding for a 0.5 FTE principal and 1.0 FTE school secretary.
- \$2,070.50 for school office supplies is allocated for each elementary school and \$3,080.50 for each secondary school, regardless of enrolment.

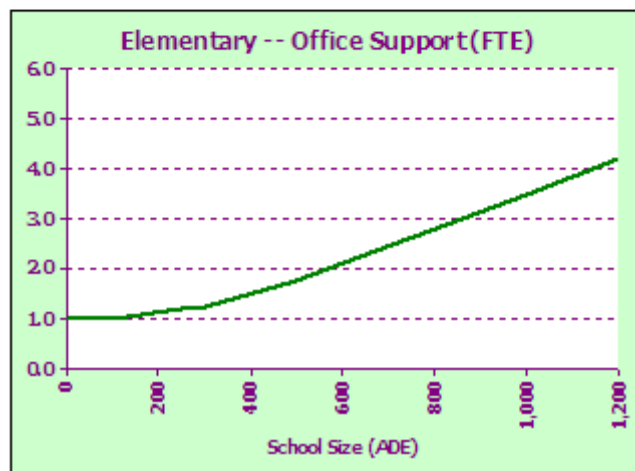
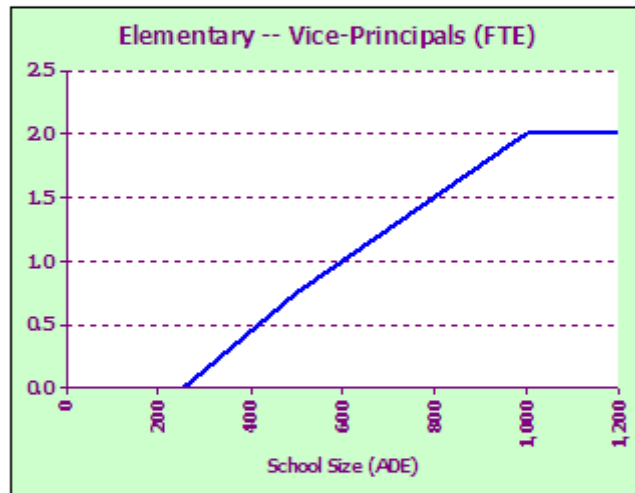
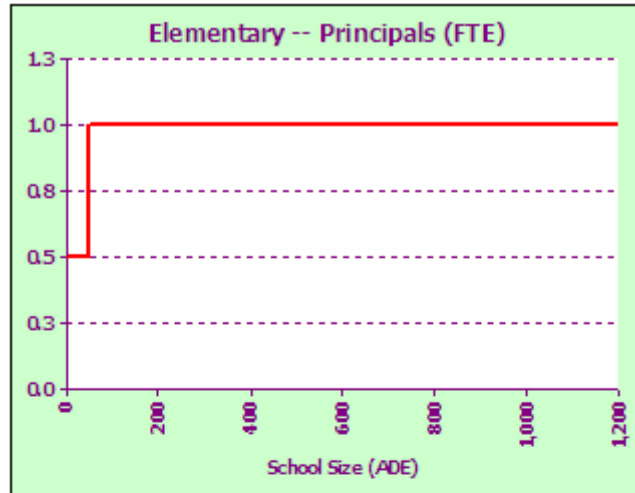
***(b) supplementary funding***

Based on each elementary school's enrolment, the formulas which follow, are used to determine additional funding for:

- vice-principals,
- office support staff (secretaries), and
- school office supplies.



## Effect of Enrolment on Funding for In-School Administration and Leadership





## School Foundation Grant – ELEMENTARY

In-School Administration and Leadership				School Office Supplies
	Principal	Office Support Staff (Secretaries)	Vice-Principal	Per School
Salary + % benefits	\$106,911 + 11.10%	\$39,440 + 23.90%	\$101,265 + 11.10%	
<b>Base Staff</b>				
School enrolment 1 to 49 ADE	0.5	1		\$2,070.50
School enrolment 50 or more ADE	1			
<b>Additional Staff Based on School Size</b>				
School enrolment 100 to 249 ADE		0.00125 x (ADE - 100)		\$6.06 / ADE
School enrolment 250 to 299 ADE		0.1875 + 0.002 x (ADE - 250)	0.0030 x (ADE - 250)	
School enrolment 300 to 499 ADE		0.2875 + 0.003125 x (ADE - 300)	0.1500 + 0.0030 x (ADE - 300)	
School enrolment 500 to 999 ADE		0.9125 + 0.003675 x (ADE - 500)	0.75 + 0.0025 x (ADE - 500)	
School enrolment 1,000 + ADE		2.75 + 0.003675 x (ADE - 1,000)	2.0	

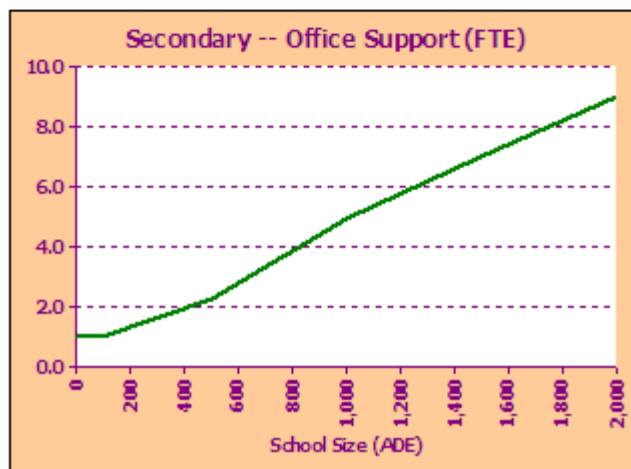
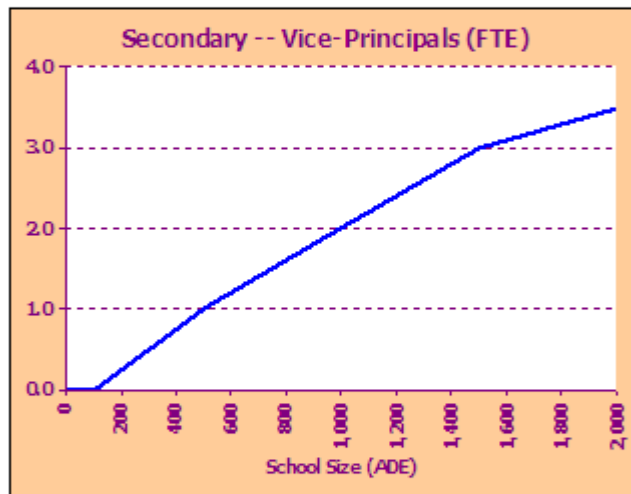
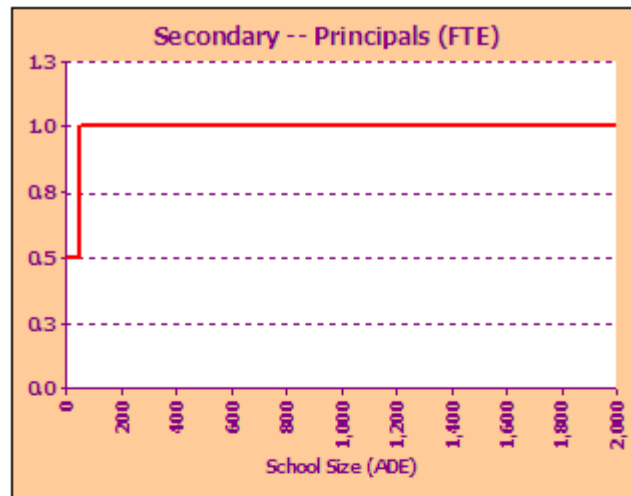
Note: Pension plan contributions for teachers and eligible members of OTPP are matched by the Government and are not included in the benchmark salaries and benefits.

### Calculation of the School Administration Component – Elementary

$$\begin{aligned}
 \text{Principal} &= (\text{base}) \times (\text{salary} + \text{benefits}) \\
 \text{Office Support Staff} &= (\text{base} + \text{additional}) \times (\text{salary} + \text{benefits}) \\
 \text{Vice - Principal} &= (\text{base} + \text{additional}) \times (\text{salary} + \text{benefits}) \\
 \text{School Office Supplies} &= (\text{base} + \text{additional})
 \end{aligned}$$

$$\text{Total Allocation} = \text{Principal} + \text{Office Support Staff} + \text{Vice - Principal} + \text{School Office Supplies}$$

## Effect of Enrolment on Funding for In-School Administration and Leadership



## School Foundation Grant – SECONDARY

In-School Administration and Leadership				School Office Supplies
Position	Principal	Office Support Staff (Secretaries)	Vice-Principal	Per School
Salary + % benefits	\$116,595 + 11.10%	\$41,547 + 23.90%	\$106,833 + 11.10%	
<b>Base Staff</b>				
School enrolment 1 to 49 ADE	0.5	1		\$3,080.50
School enrolment 50 or more ADE	1			
<b>Additional Staff Based on School Size</b>				
School enrolment 100 to 499 ADE		0.003125 x (ADE - 100)	0.0025 x (ADE - 100)	\$7.07 / ADE
School enrolment 500 to 999 ADE		1.25 + 0.0055 x (ADE - 500)	1 + 0.002 x (ADE - 500)	
School enrolment 1,000 to 1,499 ADE		4 + 0.004 x (ADE - 1,000)	2 + 0.002 x (ADE - 1,000)	
School enrolment 1,500 + ADE		6 + 0.004 x (ADE - 1,500)	3 + 0.001 x (ADE - 1,500)	

Note: Pension plan contributions for teachers and eligible members of OTPP are matched by the Government and are not included in the benchmark salaries and benefits.

### Calculation of the School Administration Component – Secondary

$$\begin{aligned}
 \text{Principal} &= (\text{base}) \times (\text{salary} + \text{benefits}) \\
 \text{Office Support Staff} &= (\text{base} + \text{additional}) \times (\text{salary} + \text{benefits}) \\
 \text{Vice - Principal} &= (\text{base} + \text{additional}) \times (\text{salary} + \text{benefits}) \\
 \text{School Office Supplies} &= (\text{base} + \text{additional})
 \end{aligned}$$

$$\begin{aligned}
 \text{Total School} \\
 \text{Administration Allocation} &= \text{Principal} + \text{Office Support Staff} + \text{Vice - Principal} + \text{School Office Supplies}
 \end{aligned}$$



## Special Purpose Grants

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The cost of education differs depending on the needs of a student and where that student lives. The special purpose grants respond to these differences by recognizing the need for specialized programs for students with individual requirements. Special purpose grants also recognize the different levels of support required by students related to language proficiency, location, transportation, and other variations in personal and local circumstances. The thirteen special purpose grants in 2009–10 are as follows:

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<b>Grant</b>	<b>Projected Funding in 2009–10* (\$ Million)</b>
1. Primary Class Size Reduction Amount	\$433.5
2. Special Education Grant	\$2,251.7
3. Language Grant	\$600.4
4. First Nations, Métis, and Inuit Education Supplement	\$19.1
5. Geographic Circumstances Grant	\$190
6. Learning Opportunities Grant	\$414.5
7. Safe Schools Supplement	\$44.1
8. Program Enhancement Grant	\$45.5
9. Continuing Education and Other Programs Grant	\$119.2
10. Cost Adjustment and Teacher Qualifications and Experience Grant	\$1,052.1
11. Student Transportation Grant	\$829.1
12. Declining Enrolment Adjustment	\$71.4
13. School Board Administration and Governance Grant	\$538.1

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\* Does not include investments unallocated at the time of publication.



## **Primary Class Size Reduction Amount\***

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The 2004–05 school year was the beginning of the Government’s commitment to cap class sizes at 20:1 for Junior Kindergarten to Grade 3 students. In 2009–10, funding for this initiative brings total support for smaller primary classes to approximately 5,100 teaching positions.

The total Primary Class Size (PCS) Reduction Amount is projected to be \$433.5 million in 2009–10. This does not include the capital funding allocation to boards to support this initiative.

The PCS Reduction Amount is calculated by multiplying the 2009–10 average daily enrolment (ADE) of pupils enrolled in Junior Kindergarten to Grade 3 by \$855.66.

In 2009–10, school boards continue to be required to organize their elementary classes so that, on a board-wide basis:

- At least 90 percent of primary classes have 20 or fewer students,
- 100 percent of primary classes have 23 or fewer students, and
- 100 percent of combined Grade 3-4 classes have 23 or fewer students.

Boards may be subject to cash flow penalties if any of the PCS targets are not met. Once a school board meets the PCS targets, it may use any surplus from the PCS Reduction Amount to address other needs in the elementary panel.

### **Reporting and Accountability**

As in previous years, schools boards are required to complete a comprehensive PCS plan by the end of June with the projected primary class size for 2009–10. The information is to be updated in September to reflect the actual primary class size results. The board reports include current and historical class size statistics on each school with elementary classes and for the board overall. The Ministry uses the data from the actual primary class size results to populate the Class Size Tracker on the Ministry’s public website and will also use the data relating to Grades 4 to 8 to monitor the average class sizes for these grades in light of the funding enhancements provided in 2009–10 for Grades 4 to 8 class size reduction.

In cases where boards’ plans do not meet the PCS targets, the Ministry will work with those boards to ensure that the targets are achieved in September 2009. The Ministry will provide further details of the accountability requirements for the Grades 4 to 8 class size reduction.

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.





## Special Education Grant

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The Special Education Grant\* provides additional funding for students who need special education programs, services, and equipment. The Special Education Grant is made up of five components:

- Special Education Per Pupil Amount (SEPPA) – \$1,044.3 million
- High Needs Amount (HNA) – \$1,007.0 million
- Special Equipment Amount (SEA) – \$66.8 million
- Special Incidence Portion (SIP) – \$40.2 million
- Facilities Amount (FA) – \$93.5 million

The Special Education Grant may only be used for special education. Any unspent funding must be placed in a special education reserve fund.

As the special education funding approach evolves, the Special Education Grant in 2009–10 is being increased by \$48.9 million.

The total Special Education Grant is projected to be \$2.25 billion in 2009–10. This funding supports the Government's commitment to increase special education funding.

The \$48.9 million increase will:

- provide funding stability for school boards by maintaining 95 percent of the school boards' HNA allocation unchanged (HNA base amount),
- introduce the Measures of Variability (MOV) amount (5 percent) as part of the HNA allocation to better reflect the variability of high needs students and boards' ability to respond to these needs in order to revise the HNA allocation without relying on a claims-based process,
- stabilize funding for education programs for school-aged children and youth in government-approved care and/or treatment, custody, and correctional facilities, following up on the ongoing review of these programs, and
- support the Special Incidence Portion (SIP) and the Special Equipment Amount (SEA) claim-based applications.

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

The Ministry continues to implement the recommendations of the Working Table on Special Education by reviewing and refining the components of the grant and consulting with stakeholders to ensure that the evolution of the funding approach supports students with special education needs, improves student outcomes, and places less emphasis on the identification process for students with high needs.

## **Special Education Per-Pupil Amount (SEPPA)**

The Special Education Per Pupil Amount (SEPPA) recognizes the cost of providing additional assistance to the majority of students with special education needs. SEPPA is allocated to boards on the basis of total enrolment.

The SEPPA amounts for 2009–10 are:

\$755.47 per JK to Grade 3 student

\$581.57 per Grade 4 to 8 student

\$383.80 per Grade 9 to 12 student

## **High Needs Amount (HNA)**

The High Needs Amount (HNA) addresses the cost of providing intensive staff support required by a small number of students with high needs.

The 2009–10 HNA allocation will provide school boards with funding stability, and it will introduce a high needs Measure of Variability (MOV) amount that begins to revise school boards' high needs variability profiles to better reflect the variability of high needs students and boards' ability to respond to these needs.

Together, the HNA base amount and the MOV amount will comprise the provincial HNA funding amount of \$1,007.0 million for 2009–10.

### **HNA Base Amount**

The HNA base amount will be determined by calculating 95% of the greater of:

(a) multiplying the board-specific high needs per-pupil amount by the board's projected 2009–10 total ADE,

OR

(b) the amount determined for the board for 2008–09.

## Measure of Variability (MOV) Amount

The MOV Amount totals 5 percent of the High Needs Amount (approximately \$50 million for 2009–10).

Those boards with greater need, as indicated by the MOV data, will see an increase in funding while those boards for which the data indicates that they are below the provincial average in relation to MOV data will see a decrease. The average increase is 1.8 percent and the average decrease is 1.23 percent.

The provincial MOV Amount will be distributed among all school boards based on three categories of data.

- Each category has an assigned percent of the total MOV amount.
- Each category has one or more factors.
- Each factor has an assigned percent of the category total.
- Each factor is weighted within a specified range related to the provincial average of the prevalence of the factor.

Category	Factor(s)	% of MOV Funding for Category/Subcategory
1. Students reported as receiving special education programs and services	2005–06 data as reported by boards (one factor)	36%
2. Participation and achievement in EQAO assessments by students with special education needs	2007–08 data for: Subcategory 2A: Grade 6 students (excluding gifted) with special education needs who were exempt, below, or reached Level 1 (six factors).	18%
	Subcategory 2B: Grade 3 students (excluding gifted) with special education needs who were exempt, below, or reached Level 1 (six factors).	18%
	Subcategory 2C: Grade 6 and Grade 3 students with an IEP (excluding gifted) with more than five Accommodations (two factors)	18%
3. Board size and rural/urban designation	2009–10 projected ADE (two factors) board size and rural board size and rural/urban	10%

There are seventeen factors (see tables below) that are used to calculate the HNA MOV Amount for each board as follows:

- a) The percent of MOV funding available for the category/subcategory (from the table above) multiplied by the percent of funding available for the factor (from the factor tables below) multiplied by the provincial MOV amount determines the provincial funding for that factor.
- b) The board's prevalence for a factor determines the weight based on the ranges provided below.
- c) The board's weight for the factor multiplied by the board's ADE determines the board's factor number. The board's factor number is divided by the total of all 72 boards' factor numbers combined for that factor and multiplied by the result of step (a) above for that factor to determine the funding for the board for that factor.
- d) A board's total MOV amount is the sum of funding generated through the calculations for all 17 factors.

**Category 1: Prevalence of Students reported as receiving special education programs and services 2005–06 data as reported by boards** (one factor). Prevalence for this category is the total number of students reported as receiving special education programs and services divided by total enrolment.

**Prevalence of Students reported as receiving special education programs and services 2005–06 data as reported by boards**

<b>% of MOV funding for this factor is 100%</b>	
<b>Weight</b>	<b>Range</b>
0.8	<=9.6%
0.9	>9.6% to <=12.35%
1	>12.35% to <=15.09%
1.1	>15.09% to <=17.83%
1.2	>17.83%

**Category 2:** Prevalence for each EQAO subcategory is the total number of students in the subcategory divided by the total number of students who took that EQAO assessment.

**Category 2: SubCategory 2A: Prevalence of Achievement in Grade 6 EQAO assessments by students with special education needs (excluding gifted) who were exempt, or reached Level 1 or less. (six factors for Grade 6)**

**EQAO - Achievement - Grade 6**

Weight	Males - Reading (20% of EQAO-Gr 6)	Males - Writing (20% of EQAO-Gr 6)	Males - Mathematics (15% of EQAO-Gr 6)	Females - Reading (15% of EQAO-Gr 6)	Females - Writing (15% of EQAO-Gr 6)	Females - Mathematics (15% of EQAO-Gr 6)
0.8	<=24.92%	<=14.48%	<=23.42%	<=21.38%	<=11.37%	<=27.24%
0.9	>24.92% to <=32.05%	>14.48% to <=18.62%	>23.42% to <=30.11%	>21.38% to <=27.49%	>11.37% to <=14.61%	>27.24% to <=35.02%
1	>32.05% to <=39.17%	>18.62% to <=22.75%	>30.11% to <=36.80%	>27.49% to <=33.60%	>14.61% to <=17.86%	>35.02% to <=42.81%
1.1	>39.17% to <=46.29%	>22.75% to <=26.89%	>36.8% to <=43.50%	>33.6% to <=39.71%	>17.86% to <=21.11%	>42.81% to <=50.59%
1.2	>46.29%	>26.89%	>43.50%	>39.71%	>21.11%	>50.59%

**Category 2: SubCategory 2B: Prevalence of Achievement in Grade 3 EQAO assessments by students with special education needs (excluding gifted) who were exempt, or reached Level 1 or less. (six factors for Grade 3)**

**EQAO - Achievement - Grade 3**

Weight	Males - Reading (20% of EQAO-Gr 3)	Males - Writing (20% of EQAO-Gr 3)	Males - Mathematics (15% of EQAO-Gr 3)	Females - Reading (15% of EQAO-Gr 3)	Females - Writing (15% of EQAO-Gr 3)	Females - Mathematics (15% of EQAO-Gr 3)
0.8	<=29.42%	<=13.83%	<=17.48%	<=29.82%	<=12.54%	<=20.77%
0.9	>29.42% to <=37.82%	>13.83% to <=17.78%	>17.48% to <=22.48%	>29.82% to <=38.34%	>12.54% to <=16.13%	>20.77% to <=26.70%
1	>37.82% to <=46.22%	>17.78% to <=21.73%	>22.48% to <=27.47%	>38.34% to <=46.86%	>16.13% to <=19.71%	>26.70% to <=32.63%
1.1	>46.22% to <=54.63%	>21.73% to <=25.68%	>27.47% to <=32.47%	>46.86% to <=55.38%	>19.71% to <=23.29%	>32.63% to <=38.57%
1.2	>54.63%	>25.68%	>32.47%	>55.38%	>23.29%	>38.57%

**Category 2 SubCategory 2C: Prevalence of Students with an IEP who required 5 or more accommodations (e.g. extra time, coloured paper, SEA equipment use, etc) for EQAO Grade 3 and Grade 6 assessments (excluding gifted students). (two factors)**

**EQAO - Accommodations**

Weight	Grade 6	Grade 3
	(50% of EQAO- Accommodations)	(50% of EQAO- Accommodations)
0.8	<=36.61%	<=39.85%
0.9	>36.61% to <=47.08%	>39.85% to <=51.24%
1	>47.08% to <=57.54%	>51.24% to <=62.63%
1.1	>57.54% to <=68.00%	>62.63% to <=74.01%
1.2	>68.00%	>74.01%

### ***Size and Rural Status Category (10% of MOV Amount)***

Allocate 10% of MOV Amount to those boards with both smallest size (less than 22,000 ADE) and a rural or urban/rural designation based on their projected 2009–10 ADE. The factors are weighted as follows:

- boards with ADE less than 22,000 and rural designation get a weight of 2,
- boards with ADE less than 22,000 and urban/rural designation get a weight of 1, and
- All other boards get a weight of 0.

## **Special Equipment Amount (SEA)**

The Special Equipment Amount (SEA) covers the cost of an individual student's equipment needs in excess of \$800 in the year of purchase. Boards are responsible for the first \$800 in cost for any student per year. For example, a board with an approved claim for a student who requires an adapted computer that costs \$3,000 would generate \$2,200 through SEA. SEA claims are submitted to the Ministry of Education Regional Offices for approval\*.

Boards may also claim 80 percent of the average cost of salaries and benefits for board-paid technicians assigned for installation and maintenance, as well as staff training and warranties related to a student's special education related equipment. The Ministry provides SEA funding for up to one technician per 30,000 students, with low-enrolment boards eligible for a minimum of 0.2 FTEs.

Equipment purchased with the SEA travels with the student as described in the *Special Education Funding Guidelines: Special Equipment Amount (SEA), 2009–10, Spring 2009\*\**.

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\* Software available through the Ontario Educational Software Service (OESS) is not eligible for SEA funding.

\*\* These documents are available on the Ministry of Education website.

## **Special Incidence Portion (SIP)**

The Special Incidence Portion (SIP) supports pupils who require more than two full-time staff to address the health and safety needs of both the students who have extraordinarily high needs related to their disabilities and/or exceptionalities and of others at school. Eligibility criteria for SIP are outlined in the *Special Education Funding Guidelines: Special Incidence Portion (SIP), 2009–10, Spring 2009\*\**. SIP claims are submitted to the Ministry of Education Regional Offices for approval.

## **Facilities Amount (FA)**

The Facilities Amount (FA) supports education programs for school-aged children and youth in government-approved care and/or treatment, custody and correctional facilities operated by the Ministry of Children and Youth Services, the Ministry of Community and Social Services, the Ministry of Health and Long-Term Care, and/or the Ministry of Community Safety and Correctional Services. These facilities include hospitals, children's mental health centres, psychiatric institutions, detention and correctional facilities, community group homes, and other social services agencies. The provision of education in these facilities is subject to an agreement between a district school board and the facility.

Funding for the FA is based on an approval process specified in a guideline issued for these programs. The recognized costs include teachers, education assistants, and classroom supplies.

Revenue is reduced for boards when a program is operating on a smaller scale than was projected or ceases to operate during the school year.

The Ministry provides funding to school boards to help offset the accommodation and transportation costs of classrooms in care and treatment and custody settings that operate in school board space. This funding is included in the Pupil Accommodation Grant and the Student Transportation Grant calculations.





## Language Grant\*

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The Language Grant provides funding to meet school boards' costs for language instruction.

The Language Grant has five components:

- French as a First Language (FFL) – \$66.1 million
- French as a Second Language (FSL) – \$231.9 million
- English as a Second Language/English Literacy Development (ESL/ELD) – \$211.2 million
- Actualisation linguistique en français (ALF) – \$87.5 million
- Perfectionnement du français (PDF) – \$3.7 million

The total Language Grant is projected to be \$600.4 million in 2009–10.

### French as a First Language (FFL)

This funding, available only to French-language boards, recognizes the higher costs of instructional materials and program support incurred in providing French-language programs.

The FFL allocation in 2009–10 is projected to be \$66.1 million.

Funding benchmarks on an ADE basis are increasing to \$699.29 per elementary day school pupil. Benchmarks per secondary day school pupil are increasing to \$796.60.

Start-up funding for new elementary classes in French is provided at the rate of \$17,362.88 for each new elementary school established by a board in 2009–10.

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

## French as a Second Language (FSL)

This funding, which is only available to English-language boards, supports the additional costs of providing core French, extended French, and French immersion programs. The FSL allocation in 2009–10 is projected to be \$231.9 million.

### French as a Second Language (FSL) – Elementary

At the elementary level, funding is provided for core and extended French based on enrolment in French programs for Grades 4 to 8. French immersion programs, if offered by the board, are funded based on enrolment in French programs for Junior Kindergarten to Grade 8.

Current Ministry policy requires that each elementary student accumulate at least 600 hours of French-language instruction by the end of Grade 8. School boards are required to plan their French-language programs so that students meet this requirement.

Average daily length of program		Allocation per pupil enrolled in the program
20 – 59 minutes	(Core, Grades 4 to 8)	\$279.31
60 – 149 minutes	(Extended, Grades 4 to 8)	\$318.23
150 minutes or more	(Immersion, Grades 1 to 8)	\$356.00
75 minutes or more	(Immersion, JK and K)	

### French as a Second Language (FSL) – Secondary

The funding is established according to credits as follows:

Grades	Allocation per-pupil credit – French as a subject	Allocation per-pupil credit – subjects other than French taught in French
9 and 10	\$71.47	\$117.58
11 and 12	\$94.52	\$183.30

## **Second-Language and Second-Dialect Instruction**

Ontario's curriculum requires that students develop strong English- or French-language skills. The cultural and linguistic diversity of Ontario's population means that many students require extra help to develop proficiency in their language of instruction. These students include those who are recent immigrants to Canada and students who live in homes where the first language spoken is neither English nor French.

Two components of the Language Grant provide school boards with resources to meet the needs of these students. English-language school boards receive the English as a Second Language/English Literacy Development (ESL/ELD) component. French-language boards receive the Perfectionnement du français (PDF) and the Actualisation linguistique en français (ALF) components.

The number of students eligible to be counted as recent immigrants is based on the country of birth, rather than the country from which the student entered Canada. This simplifies reporting and recognizes students who have "stopped over" in an English-speaking country, such as the USA, before entering Canada.

In this context, *eligibility* means that a pupil meets the funding criteria, that is, the date of entry into Canada and country of birth. As in previous years, the language of instruction components of the Language Grant use proxy measures to determine each school board's relative share of need. The calculations are not intended to count every student who requires support or to determine individual needs for these programs. Boards determine need and use resources provided by the Language Grant to provide language services and supports accordingly.

## **English-Language Instruction**

### **English as a Second Language/English Literacy Development (ESL/ELD)**

For 2009–10, the ESL/ELD allocation is projected to be \$211.2 million. The funding is available to English-language boards and is based on the sum of the Recent Immigrant and Pupils in Canada components.

## Recent Immigrant Component

The Recent Immigrant component provides a total of \$9,573.20 per eligible pupil over four years and is based on the number of recent immigrant pupils born in countries other than Canada, Great Britain, Ireland, the United States, Australia, and New Zealand, where English is not a first or standard language.

The variables used in calculating this funding are:

- a weighting factor for each of the four years, and
- the number of eligible pupils who entered Canada in each year.

### *Weighting Factors*

<b>Year</b>	<b>Start date</b>	<b>End date</b>	<b>Weighting Factor</b>
<b>1</b>	September 1, 2008	October 31, 2009	1
<b>2</b>	September 1, 2007	August 31, 2008	0.85
<b>3</b>	September 1, 2006	August 31, 2007	0.5
<b>4</b>	September 1, 2005	August 31, 2006	0.25

### *Number of Eligible Pupils*

Principals are required to report through the Ontario Student Information System (OnSIS) the number of pupils enrolled in the schools who entered Canada during the last four years and were born in a country where English is not a first or standard language. Schools are required to keep appropriate immigration information in a pupil's Ontario Student Record (OSR) to support the number of pupils reported as having entered Canada during the last four years.

### *Total Recent Immigrant Component*

The allocation is the sum of the weighted numbers of eligible pupils for each year multiplied by \$3,682.

$$\text{Recent Immigrant Component} = \frac{\text{Total number of weighted recent immigrant pupils}}{\text{Total number of weighted recent immigrant pupils}} \times \$3,682$$

## Pupils in Canada Component

The Pupils in Canada component is calculated by the Ministry based on Statistics Canada data on the number of children 5 to 19 years old whose language spoken most often at home is neither English nor French. This data is a proxy measure for the relative ESL/ELD need among boards for pupils not covered by the Recent Immigrant component. The distribution of children aged 5 to 19 between public and separate boards is based on the number of pupils residing within each enumeration area and on assessment data\*.

Each board's allocation is set out in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation. The distribution among boards is calculated as follows:

$$\frac{\text{Number of children described above within board's area}}{\text{Provincial total of children described above}} \times \$29.5 \text{ million}$$

## Total ESL/ELD Allocation

$$\text{ESL / ELD Allocation} = \text{Total Recent Immigrant component} + \text{Total Pupils in Canada component from 2009 – 10 grant regulation}$$

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\* Data source: Statistics Canada, 1996 Census – information on the 5 to 19 year old population group where the language spoken most often at home is neither English or French.

## French-Language Instruction

Funding for French-language boards for language programs in addition to FFL is based on two allocations – Perfectionnement du français (PDF) and Actualisation linguistique en français (ALF).

### Perfectionnement du français (PDF)

In 2009–10, the Perfectionnement du français (PDF) allocation is projected to be \$3.7 million.

PDF provides a total of \$9,573.20 per eligible student over four years. It is based on the number of recent immigrant pupils who do not have rights under Section 23\* of the *Canadian Charter of Rights and Freedoms*, and who were born in countries where French is a language of administration or schooling.

PDF programs are intended for pupils who have been admitted to the schools through the board's admissions committee. These pupils are generally born outside Canada and have one of the following characteristics:

- they speak a variety of language that is different from standard French,
- their schooling has been interrupted, or
- they have little knowledge of Canada's two official languages, or need to familiarize themselves with the new environment.

The variables used in calculating the PDF allocation are:

- a weighting factor for each of the four years, and
- the number of eligible pupils who entered Canada in each year.

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\* Section 23 refers to the linguistic and education rights conferred by Part 1 of the *Constitution Act, 1982*.

### *Weighting Factors*

<b>Year</b>	<b>Start date</b>	<b>End date</b>	<b>Weighting Factor</b>
1	September 1, 2008	October 31, 2009	1
2	September 1, 2007	August 31, 2008	0.85
3	September 1, 2006	August 31, 2007	0.5
4	September 1, 2005	August 31, 2006	0.25

### *Number of Eligible Pupils*

Principals are required to report in OnSIS the number of enrolled pupils who entered Canada during the last four years and were born in a country where French is not a first or standard language. Schools are required to keep appropriate immigration information in a pupil's Ontario Student Record (OSR) to support the number of pupils reported as having entered Canada during the last four years.

### *Total PDF Allocation*

The allocation is the sum of the weighted numbers of eligible pupils for each year multiplied by \$3,682.

$$\text{PDF Allocation} = \frac{\text{Total number of weighted recent immigrant pupils}}{\text{recent immigrant pupils}} \times \$3,682$$

## **Actualisation linguistique en français (ALF)**

Total ALF funding in 2009–10 is projected to be \$87.5 million.

ALF supports French-language school boards in providing language instruction to pupils who are entitled to French-language education by virtue of the Charter and who have limited or no competencies in French, or use a variety of language that is different from standard French.

The ALF allocation is the sum of the per-pupil, school, and board components.

## **Per-Pupil Component**

Using 2001 Statistics Canada data on individuals aged 0 to 19 whose language spoken most often at home does not include French, a proxy measure of assimilation has been developed to reflect the cultural environment of the boards' students.

### ***Calculation of the Assimilation Factor***

The percentage of students who use a language other than French at home is calculated at the census sub-division (CSD) level. The CSD percentages are weighted using the CSD's share of board enrolment of the CSDs to calculate the board's assimilation factor.

- 1 Only CSDs where the board operates a facility are included.
- 2 The enrolment of a CSD is the sum of enrolments of all facilities of the board in the CSD. A 75 percent floor on the assimilation factor is applied to the enrolment.
- 3 The Assimilation Factors are listed in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

### ***Elementary Per-Pupil Allocation***

$$[\text{Elementary ADE} \times \text{Assimilation Factor}] \times \$845.91$$

### ***Secondary Per-Pupil Allocation***

$$[\text{Secondary ADE} \times \text{Assimilation Factor}] \times \$371.90$$

## **School Component**

The school component is calculated using the definition of *school* used for the School Foundation Grant.

### ***Elementary School Allocation***

$$\text{Total number of elementary schools} \times \$44,362.51$$



### ***Secondary School Allocation***

The secondary school allocation comprises a school amount and an enrolment amount:

<b>Number of Students</b>	<b>2009–10 Total Per Secondary School</b>
$1 \leq \text{ADE} \leq 100$	\$159,090.02
$100 \leq \text{ADE} \leq 200$	\$197,332.53
$200 \leq \text{ADE} \leq 300$	\$235,575.03
$300 \leq \text{ADE} \leq 400$	\$273,817.54
$400 \leq$	\$312,060.04

### **Board Component**

The board amount for 2009–10 is \$277,195.77.

### **Total ALF Allocation**

The total ALF allocation for a French-language board is the sum of the per-pupil, school, and board components.

$$\textit{Total ALF Allocation} = \textit{Per - Pupil Component} + \textit{School Component} + \textit{Board Component}$$



## **First Nations, Métis, and Inuit Education Supplement\***

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The First Nations, Métis, and Inuit Education Supplement supports programs designed for Aboriginal students as outlined in the Ontario First Nation, Métis, and Inuit Education Policy Framework released in January 2007.

The First Nations, Métis, and Inuit Education Supplement has three components\*\* :

- Native Languages – \$5.9 million
- Native Studies – \$2.4 million
- Per-Pupil Amount – \$10.9 million

The total First Nations, Métis, and Inuit Education Supplement is projected to be \$19.1 million in 2009–10. This is an increase of \$0.3 million over 2008–09 Revised Estimates due in part to increased program takeup.

### **Native Languages**

The \$5.9 million supports the elementary and secondary Native Language programs. Funding is based on the number of pupils\*\*\* enrolled and the average daily length of the program as set out below.

#### **Native Language (NL) – Elementary**

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<b>Average daily length of program</b>	<b>Staff per 8 elementary students</b>	<b>Allocation per pupil enrolled in the program</b>
20 – 39 minutes	0.2	\$1,912.13
40 minutes or more	0.3	\$2,868.19

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

\*\* May not add up due to the effects of rounding.

\*\*\* The term “pupils” refers to “pupils of the board.” However, even if enrolled in a board’s school, First Nations pupils resident on reserves are not considered to be pupils of the board for the purposes of calculating grants to school boards.

## Native Language (NL) – Secondary

The funding is established according to credits as follows:

Grades	Staff per 8 secondary students	Allocation per-pupil credit
9 to 12	0.167	\$1,593.44

## Native Studies

In 2009–10, \$2.3 million is being provided to fund secondary Native Studies\* courses. Funding is based on the same benchmarks used to allocate funding for students enrolled in secondary school Native Languages programs.

### Native Studies

The funding is established according to credits as follows:

Grades	Staff per 8 secondary students	Allocation per-pupil credit
9 to 12	0.167	\$1,593.44

## Per-Pupil Amount

In 2009–10, the Per-Pupil Amount is \$10.9 million with a benchmark of approximately \$93.78 per estimated Aboriginal student, with a weighting factor that directs more funding to boards with a higher estimated proportion of First Nation, Métis, and Inuit students.

The estimated proportion of First Nations, Métis, and Inuit students is based on 2006 Census data.

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\* Refer to the Common Course Codes document on the Ministry of Education website, <http://www.edu.gov.on.ca/eng/general/list/commoncc/cc.html> for course listings.

<b>Estimated percentage of First Nation, Métis, and Inuit Student population</b>	<b>Weighting factor</b>
between 0 and 7.49%	1
between 7.5% and 14.99%	2
15% or more	3

***Estimating the Percentage of First Nation, Métis, and Inuit Population in a Board***

The percentage of First Nation, Métis, and Inuit population is calculated at the census sub-division (CSD) level. The CSD percentages are weighted using the CSD’s share of board enrolment of the CSDs to estimate the board’s population.

$$\text{Per - Pupil Funding} = ADE \times \begin{matrix} \text{Estimated Percentage} \\ \text{of First Nation, Métis,} \\ \text{and Inuit Population} \end{matrix} \times \begin{matrix} \text{Weighting} \\ \text{Factor} \end{matrix}$$

- 1 Only CSDs where the board operates a facility are included.
- 2 The enrolment of a CSD is the sum of enrolments of all facilities of the board in the CSD.
- 3 The estimated percentage of First Nation, Métis, and Inuit population for each board is listed in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.



## **Geographic Circumstances Grant\***

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The Geographic Circumstances Grant recognizes the additional costs of operating small schools in isolated areas and costs that are associated with the geography of boards, including board size and school dispersion.

The Geographic Circumstances Grant consists of the following:

- Remote and Rural Allocation – \$122.6 million
- Supported Schools Allocation – \$63 million
- Rural and Small Community Allocation – \$4.4 million

The total Geographic Circumstances Grant is projected to be \$190 million in 2009–10.

### **Remote and Rural Allocation**

The Remote and Rural Allocation supports the higher cost of purchasing goods and services for small school boards, as well as for boards that are distant from major urban centres, and boards with schools that are distant from one another. In 2009–10, this component is projected to be \$122.6 million.

Board enrolment, distance from an urban centre, and school dispersion are used to determine funding.

#### **Board Enrolment**

This component supports the higher per-pupil costs for goods and services faced by smaller school boards.

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

<b>Enrolment</b>	<b>Per-Pupil Amount – Elementary</b>
0 to < 4,000	\$312.90 – (Day School ADE x 0.01699)
4,000 to < 8,000	\$244.93 – ([Day School ADE – 4,000] x 0.01952)
8,000 or more	\$166.87 – ([Day School ADE – 8,000] x 0.02086)

<b>Enrolment</b>	<b>Per-Pupil Amount – Secondary</b>
0 to < 4,000	\$312.90 – (Day School ADE x 0.01699)
4,000 to < 8,000	\$244.93 – ([Day School ADE – 4,000] x 0.01952)
8,000 or more	\$166.87 – ([Day School ADE – 8,000] x 0.02086)

### **Distance/Urban Factor/French-Language Equivalence**

This allocation takes into account the additional costs of goods and services related to remoteness and the absence of nearby urban centres. This allocation also recognizes that, much like remote school boards, French-language school boards in southern Ontario operating in a minority language context face higher costs in obtaining goods and services.

Distance (referred to as  $D$  in the formula below) is measured from the nearest defined cities of Toronto, Ottawa, Hamilton, London, or Windsor to the town or city located nearest to the geographic centre of the board.

$$\text{Distance / Urban Allocation} = \left( \begin{array}{l} \text{per pupil amount} \\ \text{based on distance (D)} \end{array} \times \text{ADE} \times \text{urban factor} \right)$$

<b>Distance</b>	<b>Per-Pupil Amount</b>
0 to < 151 kilometres	\$0
151 to < 650 kilometres	\$1.06746 x (D–150)
650 to < 1,150 kilometres	\$533.73 + [\$0.14366 x (D–650)]
1,150 kilometres +	\$605.56



City or town within a board's jurisdiction with a population of	Urban factor
0 – 25,000	1
25,000 – 200,000	$1 - \left( \frac{\text{population} - 25,000}{175,000} \right)$
200,000 +	0

### ***Distance Equivalence***

French-language school boards receive the higher of their distance/urban allocation or a distance allocation of \$174.35 per pupil.

### **School Dispersion**

This component recognizes the higher costs of providing goods and services to students in widely dispersed schools.

The school dispersion measure consists of:

- the average distance between a board's schools, calculated on the basis of the shortest unique road route linking all the schools in a board, and
- the average road distance between the central board office and each school of the board, based on the shortest unique road route linking the board office with each school.

The average dispersion is expressed as the weighted average of the two distances: the school-to-school average weighted at 0.8 and the board-office-to-school average weighted at 0.2.

Only boards with an average dispersion distance greater than 14 kilometres qualify for funding under the dispersion component. Each qualifying board's allocation for this component is determined by the following formula.

$$\text{Dispersion Allocation} = (2009-10 \text{ ADE}) \times (\$5.61662 / \text{pupil}) \times \left( \frac{\text{Dispersion Factor} - 14 \text{ km}}{\text{Factor}} \right)$$

Each board's average school dispersion distance is set out in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

## Supported Schools Allocation

The Supported Schools Allocation provides additional funding for teaching staff to keep low-enrolment schools that are far from other schools of the board viable.

The definition of a *school* is the same that is used for the School Foundation Grant.

- An elementary school is deemed to be “supported” if the next closest elementary school of the board is at least 20 kilometres away.
- A secondary school is deemed to be “supported” if the next closest secondary school of the board is at least 45 kilometres away.

Funding is provided so that:

- Supported elementary schools with 50 or more students generate funding for a minimum of 7.5 teachers.
- Supported secondary schools with 50 or more students generate funding for a minimum of 14 teachers.
- As enrolment increases beyond 150 students for a supported elementary school, or beyond 200 for a supported secondary school, these schools generate additional funding for teachers, above funding formula standards, to reflect the fact that providing specialist teachers and programs may require travel by teachers.
- Funding for teachers is scaled for supported schools with enrolments between 1 and 49 students.

Supported schools\* also generate top-up funding through the School Operations and School Renewal Allocations of the Pupil Accommodation Grant when enrolment is less than the capacity of a school (see page 104.)

### Elementary Supported Schools

<b>Supported School Size (2009–10 ADE)</b>	<b>Funding (using 2009–10 ADE)</b>
ADE $\geq$ 1 and ADE < 50	\$66,339.04+ (ADE x \$6,515.99)
ADE $\geq$ 50 and ADE < 150	\$573,637.58 - (ADE x \$3,629.98)
ADE $\geq$ 150	\$29,140.79

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\* Supported schools are referred to as “outlying schools” in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

## Secondary Supported\* Schools

<b>Supported School Size (2009–10 ADE)</b>	<b>Funding (using 2009–10 ADE)</b>
ADE ≥ 1 and ADE < 50	$\$56,193.07 + (\text{ADE} \times \$15,845.10)$
ADE ≥ 50 and ADE < 200	$\$1,070,790.14 - (\text{ADE} \times \$4,446.84)$
ADE ≥ 200 and ADE < 500	$\$261,068.83 - (\text{ADE} \times \$398.23)$
ADE ≥ 500	$\$61,952.86$

Funding for French-language secondary supported schools is net of funding received through the secondary school component of the ALF allocation of the Language Grant; this is not reflected in the table above.

### Distant Schools Allocation - Learning Resources Component

The Distant Schools Allocation (DSA) was introduced in 2003–04 as part of the Rural Education Strategy. The components of the Rural Education Strategy in 2007–08 are the DSA – Learning Resources component and the Distant Top-up Funding (see page 87, 105), flowed through the School Operations and School Renewal Allocations.

In 2009–10, the combined funding offered through the new Supported Schools Allocation and the residual DSA – Learning Resources component of the Geographic Circumstances Grant will be equivalent to or higher than the 2006–07 DSA funding for each board, subject only to adjustments to recognize where previously eligible schools have been closed by a board. The residual DSA is continued in 2009–10.

## Rural and Small Community Allocation

The Rural and Small Community Allocation (RSCA) supports boards with schools in rural or small communities. In 2009–10, this allocation is projected to be \$4.4 million.

This allocation is based on the Rural and Small Community Measure, which represents the proportion of a municipality's population residing in rural areas or small communities. The Rural and Small Community Measure is currently used to support provincial grants to municipalities through the Ontario Municipal Partnership Fund

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\* Includes schools designated as “combined schools” in the School Foundation Grant.

(OMPF). As with OMPF, the Ministry of Education's RSCA is provided to boards with a minimum rural measure of 25 per cent, and on a sliding scale up to a rural measure of 75 per cent. Boards\* receive the full amount of support if they have a rural measure of 75 percent or greater.

$$RSCA = ADE \times \text{per-pupil amount} \times RSCI \text{ factor}$$

Boards with a minimum measure of 25 percent are eligible for this funding and it is calculated as follows:

$$\text{If } RSCI \geq 75\%, \text{ then } RSCA = ADE \times \$21.05$$

$$\text{If } RSCI \geq 25\% \text{ and } \leq 75\%, \text{ then } RSCA = ADE \times \$21.05 \times (RSCI - 25\%) \times 2$$

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\* The Rural and Small Community Index (RSCI) factors are listed in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

## Learning Opportunities Grant

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The original Learning Opportunities Grant (LOG) supported boards in offering a wide range of locally determined programs for students with a higher risk of academic difficulty. The grant then consisted of a single allocation, which was later called the Demographic Component. Two other components to further address student achievement were added in 2000–01 and 2003–04.

The Learning Opportunities Grant comprises:\*

- Demographic Component – \$338.6 million
- Literacy and Math Outside the School Day Component – \$16.9 million
- Student Success, Grades 7 to 12 Component – \$58.9 million

The total Learning Opportunities Grant is projected to be \$414.5 million in 2009–10.

### Demographic Component

The largest portion of LOG funding – \$338.6 million – is flowed through the Demographic Component, which provides funding based on social and economic indicators that have been associated with a higher risk of academic difficulties. The Demographic Component supports boards in offering a wide range of programs to improve the educational achievement of these students. Boards have considerable latitude in determining the kinds of programs and supports that they provide with this funding.

The Demographic Component uses three allocation methods, each for a designated portion of funding, to determine allocations for school boards. While the first method determines the base amount, the second and third methods are specific to the enhancements introduced in 2002–03, 2003–04, and 2004–05.

$$\begin{array}{l} \textit{Demographic} \\ \textit{Component} \end{array} = \begin{array}{l} \textit{1998 - 99} \\ \textit{Model} \end{array} + \begin{array}{l} \textit{2002 - 03} \\ \textit{Model} \end{array} + \begin{array}{l} \textit{2003 - 04 and} \\ \textit{2004 - 05 Model} \end{array}$$

Each board's allocation for the Demographic Component is set out in the *Grants for Student Needs—Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

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\* May not add up due to the effects of rounding.

## 1998–99 Allocation Method

The initial method, created for the 1998–99 school year, was determined by the following socio-economic indicators derived from 1991 census information provided by Statistics Canada:

Indicator	Description	Provincial Rate
Low Income Cut-Off (LICO)	The percent of all persons who are living below the low income cut-off (LICO) point. LICOs are determined by Statistics Canada and vary from community to community.	13.1%
Low Education	The percent of all persons 15 years old or older who have less than a Grade 9 level education.	11.5%
Recent Immigration	The percent of all persons who immigrated to Canada between 1988 and 1991.	3.25%
Aboriginal Status	The percent of all persons indicating Aboriginal as their sole ethnic origin.	0.7%

The funding is based on:

- the eligible enumeration areas within the board,
- the funding units within eligible enumeration areas, and
- the allocation of funding units among each board within the eligible areas.

### *Eligible Area*

The area used for the purpose of the calculation is an enumeration area. An area is eligible where the percentage of the area population in any one of the four socio-economic indicators is at least twice the provincial rate. Once an enumeration area is eligible on any one of the four indicators, funding is calculated based on the LICO rate for that enumeration area.

### *Funding Units*

$$\text{Funding Units} = \frac{\text{Child population (less than 18 years of age)}}{\text{Provincial LICO rate}} \times \left( \frac{\% \text{ area population [LICO]}}{\text{Provincial LICO rate}} \right)$$

In some instances, LICO information was not available for an eligible enumeration area due to the suppression of low response rates by Statistics Canada. Where no LICO information is available for the eligible enumeration area, the Low Education variable is used in place of LICO for the calculation of funding units.

Example:

Data for enumeration area A:

Child population (under 18 years old)	1300
% of population below the LICO point	11.1%
% of population with Aboriginal status	0.1%
% of population 15 years old and older with lower than Grade 9 education	24.0%
% of population who recently immigrated	5.0%

In this example, the enumeration area qualifies since it is more than twice the provincial rate on the Low Education variable.

Funding units for eligible area A:

$$1,300 \times \left( \frac{11.1 \text{ [LICO rate of area A]}}{13.1 \text{ [provincial LICO rate]}} \right)$$

### ***Allocation of Funding Units Among Boards***

All funding units in eligible enumeration areas are summed according to census subdivisions (CSD). Funding units in a CSD are apportioned to each board by using municipal enumeration data showing school-aged population of public and separate and English- and French-language electors.

The funding units that a board has accumulated are then translated into funding as follows:

$$\left( \frac{\text{Total number of funding units for a board}}{\text{Total number of funding units for all boards}} \right) \times \text{Total Allocation}$$

### **2002–03 Allocation Method**

In 2002–03 funding for the Demographic Component was increased by \$15 million. A second model was created to calculate boards' shares of the \$15 million enhancement. In addition to the four indicators identified in 1998–99, a new factor was introduced to recognize lone-parent status.

The method of the Demographic Component added in 2002–03 is determined by the following socio-economic indicators from the 1996 Census.

<b>Indicator</b>	<b>Description (1996 Census)</b>	<b>Weight</b>
Low Income Cut-Off (LICO)	The percent of all persons who are living below the low income cut-off (LICO) point.	50%
Low Education	The percent of all persons 15 years or over who have less than a Grade 9 level education.	12.5%
Recent Immigration	The percent of all persons who immigrated to Canada between 1991 and 1996.	12.5%
Lone-Parent Status	The percent of families that are lone-parent families.	12.5%
Aboriginal Origin	The percent of all persons indicating Aboriginal as their ethnic origin.	12.5%

1. Schools are ranked for each indicator.
2. Based on their variable ranks, schools generate per-pupil funding units according to the funding unit scale. The 40 percent of schools with the most at-risk students for a given variable receive funding units. The funding unit scale provides a gradual increase in the per-pupil amount generated based on the level of risk in the school.
3. The per-pupil funding units for each indicator are multiplied by the enrolment of the school to create a school-level funding unit total for the indicator. Funding units for all indicators are summed to produce total school funding units.
4. The total funding amount is distributed on a school basis proportional to the funding units.

$$\text{Funding Unit Value} = \frac{\text{Total Funding Available}}{\text{Total Funding Units}}$$

$$\text{School LOG Funding} = \text{School Funding Units} \times \text{Funding Unit Value}$$

5. School funding is summed to determine total funding for each school board.



## 2003–04 and 2004–05 Allocation Method

Funding for the Demographic Component was enhanced by \$95 million in December 2003 and \$65 million in August 2004. This funding provides a greater share of the increases to boards with the largest number of students at risk because of social and economic factors or because the students have arrived in Canada recently.

A third method was created to determine boards' shares of the \$95 million and \$65 million enhancements based on the following socio-economic indicators from the 1996 Census:

Indicator	Description (1996 Census)	Weight
Recent Immigration	The percent of all persons who immigrated to Canada between 1991 and 1996.	50%
Low Income Cut-Off (LICO)	The percent of all persons who are living below the low income cut-off (LICO) point.	40%
Low Education	The percent of all persons 15 years or over who have less than a Grade 9 level education.	5%
Lone Parent Status	The percent of families that are lone-parent families.	5%

1. Schools are ranked for each indicator.
2. Based on their variable ranks, schools generate per-pupil funding units according to the funding unit scale. The 40 percent of schools with the most at-risk students for a given variable receive funding units. The funding unit scale provides a gradual increase in the per-pupil amount generated based on the level of risk in the school.
3. The per-pupil funding units for each indicator are multiplied by the enrolment of the school to create a school-level funding units total for the indicator. Funding units for all indicators are summed to produce total school funding units.
4. The total funding amount is distributed on a school basis proportional to the funding units.

$$\text{Funding Unit Value} = \frac{\text{Total Funding Available}}{\text{Total Funding Units}}$$

$$\text{School LOG Funding} = \text{School Funding Units} \times \text{Funding Unit Value}$$

5. School funding is summed to determine total funding for each school board.

## Literacy and Math Outside the School Day Component

The Literacy and Math Outside the School Day Component provides funding for additional supports to enhance the literacy and math skills of students at risk of not meeting the curriculum standards and the requirements of the Grade 10 literacy test. In 2009–10, this component is projected to be \$16.9 million.

These programs may be provided during the summer and during the school year outside the regular school day for:

- a class or course in literacy and math for Grade 7 or 8 students for whom a remedial program in literacy and math has been recommended by the principal of the day school,
- a non-credit class in literacy and math for Grade 9 to 12 students for whom a Grade 9 or 10 remedial program in literacy and math has been recommended by the principal of the day school,
- a literacy or math class or course for adults who are parents or guardians of students in any grade for whom the principal of the day school has recommended a remedial course in literacy or math.

In 2009–10, per-pupil funding is increasing to \$6,175 per ADE.

### Summer Literacy and Math Programs

Per-pupil funding for literacy and math programs at \$6,175 per ADE is available in the summer of 2009, for at-risk students in Grades 7 to 12 and for parents of at-risk students. Transportation for students to summer programs in 2009–10 is provided at the increased level of funding (see page 87).

Transportation for pupils enrolled in summer school literacy and math programs is provided as follows\*:

$$\frac{\text{2009 - 10 transportation allocation for the board}}{\text{2009 - 10 ADE of pupils of the board}} \times \frac{\text{ADE of Grades 7 to 12}}{\text{literacy and math summer school programs}} \times 3$$

The School Operations (p. 106) and School Renewal Allocations (p. 108) of the Pupil Accommodation Grant are also provided for students in Grades 7 to 12 literacy and math summer school programs.

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\* Grade 4 to 8 ADE is used as a proxy for Grade 7 and 8 ADE.

## Student Success, Grades 7 to 12 Component

In 2009–10, \$58.9 million is being provided for the Student Success, Grades 7 to 12 Component to assist students who may not achieve their educational goals. This funding is to be used to enhance preparation of students for passing the Grade 10 literacy test, and to increase opportunities for students to participate in successful school-to-work, school-to-apprenticeship, or school-to-college program pathways.

Funding for the Student Success, Grades 7 to 12 component is allocated\* as follows:

- Co-ordinator: 20 percent (\$11.7 million) – provides each school board with a dedicated leader to assist schools in developing programs to improve student success,
- Enrolment: 47 percent (\$27.9 million) – based on enrolment in Grades 7 to 12\*\* ,
- Demographic: 20 percent (\$11.7 million) – based on socio-economic factors associated with academic success (using the same factors used to allocate the \$15 million added to the Demographic Component of LOG in 2002–03) – ensures that school boards with a higher proportion of risk factors receive a higher proportion of funds. Each board’s Student Success Demographic Factor is set out in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation,
- Dispersion: 10 percent (\$5.8 million) – recognizes increased program costs for widely dispersed schools (using the same factor that is used in the Remote and Rural Allocation) and ensures that small, non-urban, and French-language school boards receive a higher proportion of funds, and
- Transportation: 3 percent (\$1.9 million).

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\* May not add up due to rounding.

\*\* Grade 4 to 8 ADE is used as a proxy for Grade 7 and 8 ADE.



## Safe Schools Supplement

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Formerly allocated outside the GSN, the Safe Schools Supplement supports amendments to the safe schools provisions of the *Education Act*, which came into effect February 1, 2008. The purpose of these amendments was to more effectively combine prevention support, early intervention, and discipline with opportunities for students to continue their education. Safe Schools Supplement funding supports the Government's comprehensive Safe Schools Strategy as well as selected secondary schools in priority urban neighbourhoods.

The Safe Schools Supplement comprises:

- Safe School Strategy Allocation – \$34.1 million
- Urban and Priority High Schools Allocation – \$10 million

The total Safe Schools Supplement is projected to be \$44.1 million in 2009–10.

### Safe Schools Strategy Allocation

This section of the Safe Schools Supplement is made up of the Professional Support Staff component and the Program and Support component. The allocation is based on enrolment, geographic factors, and on social and economic indicators, with all boards receiving a minimum allocation of \$25,750 for professional supports and \$51,500 for programs and supports for suspended and expelled students.

#### Professional Support Staff Component

The \$10.7 million Professional Support Staff Component supports "non-teaching" staff such as social workers, child and youth workers, psychologists, and attendance counsellors. The activity of such para-professional staff is critical to preventing and mitigating at-risk factors for a significant number of students.

The professional support amount is calculated by taking the larger of \$25,750 or the sum of the following three amounts:

$$\begin{aligned}
 & \text{ADE} \times \$3.38 \\
 & \quad + \\
 & \text{ADE} \times \text{Board's Weighted Per - Pupil} \\
 & \quad \text{Amount for Professional Supports} \\
 & \quad + \\
 & (\text{ADE Grades 9-12} \times \$0.215954 + \text{ADE Grades 4-8} \times \$0.177279) \times \text{Board's Remote and} \\
 & \quad \text{Rural Dispersion Factor}
 \end{aligned}$$

Each board's allocation for the weighted per-pupil amount for professional support is set out in the *Grants for Student Needs—Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

### Program and Support Component

Annual funding of \$23.4 million is being provided for programs and support for expelled students and students serving long term suspensions.

The amount for programs and support for these students is calculated by taking the larger of \$51,500 or the sum of the following three amounts:

$$\begin{aligned}
 & \text{ADE} \times \$7.39 \\
 & \quad + \\
 & \text{ADE} \times \text{Board's Weighted Per - Pupil} \\
 & \quad \text{Amount for the Program and} \\
 & \quad \text{Support Component} \\
 & \quad + \\
 & (\text{ADE Grades 9-12} \times \$0.472745 + \text{ADE Grades 4-8} \times \$0.177279) \times \text{Board's Remote and} \\
 & \quad \text{Rural Dispersion Factor}
 \end{aligned}$$

Each board's allocation for the weighted per-pupil amount for program and support is set out in the *Grants for Student Needs—Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

The following demographic factors based on 2001 census data were used to construct the Weighted Per-Pupil Amounts:

- Estimated percentage of student-aged population in households whose income is below the Low Income Cut-Off,
- Estimated percentage of student-aged population having at least one parent without at least some post-secondary education,
- Estimated percentage of student-aged population in a lone parent family,
- Estimated percentage of First Nation, Métis and Inuit student population, and
- Estimated percentage of student-aged population who immigrated to Canada between 1996 and 2001.

## Urban and Priority High Schools Allocation

Urban secondary schools struggling with safety issues may face challenges that arise from their size and their neighbourhood and community settings, including poverty and lack of community resources. In response to these challenges, the Ministry provided \$10 million beginning in 2008–09. This funding will continue in the 2009–10 school year.

This funding will provide needed supports in the school and resources in the community that are targeted to students and their families such as after-school recreational and arts programs, literacy and numeracy support and peer mentoring opportunities. District school boards worked with community partners to identify the resources required based on the needs of students and existing services. The boards developed school action plans that relate to increased student achievement and improved school safety. The initiative recognizes that ensuring all students have the opportunity and supports they need to develop to their full potential is a shared responsibility between the school and the community.

Each board's allocation for the Urban and Priority High Schools Allocation is set out in the *Grants for Student Needs—Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.





## **Program Enhancement Grant**

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The Program Enhancement Grant supports the Government's commitment to providing students with a well-rounded education through programs such as arts, music, physical education, and outdoor education.

The total Program Enhancement Grant is projected to be \$45.5 million in 2009–10.

This grant may be used to:

- fund or enrich existing programs, or
- offer new programs.

Funding is provided as follows:

$$\text{Program Enhancement Grant Funding} = \frac{\text{No. of schools}}{\text{schools}} \times \$9,650$$

It should be noted that, while each board's level of funding is based on its number of schools, boards have flexibility to decide how to use this funding.



## **Continuing Education and Other Programs Grant**

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The Continuing Education and Other Programs Grant supports adult day school programs and continuing education programs, adult Native language, adult credit for diploma, correspondence/self-study programs, secondary crossover or transfer courses, summer school courses, elementary and secondary reach-ahead courses, elementary international language courses, and Prior Learning Assessment and Recognition (PLAR) for mature students.

The Continuing Education and Other Programs Grant consists of:

- Adult Day School – \$14.6 million
- Summer School – \$22.7 million
- Continuing Education – \$57.7 million
- Prior Learning Assessment and Recognition (PLAR) – \$1.2 million
- International Languages, Elementary – \$23.0 million

In 2009–10, the Continuing Education and Other Programs Grant is projected to be \$119.2 million, which includes a \$2.8 million increase to improve the working conditions of Continuing Education and International Languages instructors. The \$2.8 million is in addition to the 3 percent salary benchmark increase provided for all staff.

Funding is increasing to \$3,046 per ADE for Adult Day School and Summer School pupils, to \$3,153 per ADE for Continuing Education pupils (excluding pupils for whom fees are chargeable under the tuition fees regulation), and to \$50.12 per classroom hour for International Language Programs.

Funding through the School Operations and School Renewal Allocations of the Pupil Accommodation Grant is provided for day school students aged 21 and over, and for students enrolled in summer school programs and in continuing education credit courses offered during the day.

### **Secondary School Crossover or Transfer Courses**

Funding is provided for crossover or transfer courses to allow secondary students to move between the applied and academic streams, and to allow partial credits as permitted by Ontario secondary school curriculum policy documents.

### **Summer School and After-School Credit Courses**

This grant supports credit courses for elementary reach-ahead students and credit courses for secondary school students in the summer or outside the school day, for example, in the evenings.

## **Prior Learning Assessment and Recognition**

Prior Learning Assessment and Recognition (PLAR) for mature students is a formal evaluation and accreditation process carried out under the direction of a school principal and through which the principal may grant secondary school credits to mature students. PLAR assessment services that are funded include:

- \$114 for an individual student assessment for Grade 9 and 10 credits (maximum of one such assessment per mature student in any one school year),
- \$114 for an individual student equivalency assessment for Grade 11 and 12 credits (maximum of one such assessment per mature student in any one school year), and
- \$342 for each completed challenge assessment for a Grade 11 or 12 full credit course, whether successful or unsuccessful.

School boards are funded based on their reporting of these assessment activities.

## **International Language Programs, Elementary**

Funding is also provided for international language programs for elementary students. The allocation for international languages for school boards offering approved classes for international language instruction in a language other than English or French is based on a rate of \$50.12 per classroom hour where the board's average class size for the program is 23 or more. Where the average class size for a board with this program is less than 23, the rate of \$50.12 per classroom hour is reduced by \$1 for every pupil less than 23.

## Cost Adjustment and Teacher Qualifications and Experience Grant\*

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The Cost Adjustment and Teacher Qualifications and Experience Grant provides funding to boards with teachers who, because of their qualifications and experience, have salaries above the benchmark level used in the Pupil Foundation Grant.

Funding through the Cost Adjustment and Teacher Qualifications and Experience Grant is provided through three components:

- Cost Adjustment Component – \$21.9 million
- Teacher Qualifications and Experience Component – \$1,016.4 million
- New Teacher Induction Program Component (NTIP) – \$13.8 million

The total Cost Adjustment and Teacher Qualifications and Experience Grant is projected to be \$1.05 billion in 2009–10.

### Cost Adjustment Component

A cost adjustment for non-teaching staff is being provided in 2009–10 on the same basis as in 2008–09. The Ministry has estimated the amount of funding needed by calculating average salaries for various staffing categories – using salary and staffing information reported by boards in the 2008–09 Revised Estimates – and comparing these average salaries to the benchmarks.

Each board's funding under the Cost Adjustment Component is set out in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

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\* For details of the ETFO/OPSBA PFA, (which affects English-language elementary teachers), please refer to the Addendum, beginning on p. 137.

## Teacher Qualifications and Experience Component

The elementary\* allocation for teacher qualifications and experience is calculated as follows:

$$\left( \text{Sum of } \left[ \frac{\text{Elementary teachers on board's regular grid} \times \text{Instructional salary matrix}}{\text{Number of elementary teachers on board's regular grid distribution}} \right] - 1 \right) \times \text{Elementary Q\&E benchmark } (\$3,745.32) \times \text{Elementary ADE}$$

+

$$\left( \text{Sum of } \left[ \frac{\text{Elementary teachers on board's regular grid} \times \text{Instructional salary matrix}}{\text{Number of elementary teachers on board's regular grid distribution}} \right] - 1 \right) \times \text{Grade 4-8 per-pupil amount } (\$13.77) \times \text{Grade 4-8 ADE}$$

The secondary per-pupil allocation for teacher qualifications and experience is calculated as follows:

$$\left( \text{Sum of } \left[ \frac{\text{Secondary teachers on board's regular grid} \times \text{Instructional salary matrix}}{\text{Number of secondary teachers on board's regular grid distribution}} \right] - 1 \right) \times \$4,729.83$$

### *Instructional Salary Matrix*

Qualifications & Experience	D	C	B	A1	A2	A3	A4
0	0.5825	0.5825	0.5825	0.6178	0.6478	0.7034	0.7427
1	0.6185	0.6185	0.6185	0.6557	0.6882	0.7487	0.7898
2	0.6562	0.6562	0.6562	0.6958	0.7308	0.7960	0.8397
3	0.6941	0.6941	0.6941	0.7359	0.7729	0.8433	0.8897
4	0.7335	0.7335	0.7335	0.7772	0.8165	0.8916	0.9418
5	0.7725	0.7725	0.7725	0.8185	0.8600	0.9398	0.9932
6	0.8104	0.8104	0.8104	0.8599	0.9035	0.9881	1.0453
7	0.8502	0.8502	0.8502	0.9013	0.9475	1.0367	1.0973
8	0.8908	0.8908	0.8908	0.9435	0.9919	1.0856	1.1500
9	0.9315	0.9315	0.9315	0.9856	1.0356	1.1344	1.2025
10	1.0187	1.0187	1.0187	1.0438	1.0999	1.2166	1.2982

\* See the Addendum, p.137, for amounts related to the ETFO/OPSBA Provincial Framework Agreement.

In 2009–10, the salary benchmark for teachers is being increased as part of the four-year PFA agreements.

The salary matrix reflects a benchmark of \$68,695 for a teacher's salary and excludes teacher-consultants, continuing education teachers, and the administrative component of principals and vice-principals. They are, therefore, to be excluded from the board's regular grid distribution for the purpose of calculating grant entitlements. Teachers providing instruction in care and treatment facilities are also excluded from the board's grid distribution. This is because the instructional cost of such programs is funded under special education, and pupils in these programs are not counted as pupils of the board.

The teacher distribution as of October 31, 2009, is used for the calculation of this grant component. Where the qualification of a teacher changes after October 31, 2009, and the change for salary purposes is retroactive to October 2008, or earlier, the changed qualification category is used for the purpose of this calculation.

Funding recognizes teachers' actual experience and ensures consistent claims for the Teacher Qualifications and Experience component by recognizing part years of teaching. Boards are to place teachers on the experience grid by rounding part-year experience to the nearest whole number of years of experience.

## **New Teacher Induction Program Component**

The New Teacher Induction Program (NTIP) was established in 2005–06 and was designed to support the growth and professional development of new teachers in the system. The program provides a full year of professional support to help new teachers develop the requisite skills and knowledge to be effective as teachers in Ontario.

NTIP consists of:

- orientation for all new teachers to the school and school board,
- mentoring for new teachers by experienced teachers, and
- professional development and training in such areas as Literacy and Numeracy strategies, Student Success, and Safe Schools, classroom management, effective parent communication skills, and instructional strategies that address the learning and culture of students with special needs and other diverse learners.

New teachers are appraised by their principals twice within the first twelve months of employment. New teachers who successfully complete two appraisals within the required time period receive a notation of successful completion of NTIP on their Certificate of Qualification and on the Ontario College of Teachers public register.

In 2009–10, school boards will receive funding for the New Teacher Induction Program Component that is the lesser of:

1. \$50,000 per board plus \$720 x number of teachers on Rows 0, 1, and 2 of board's Teacher Qualifications and Experience Grid in 2008–09,

OR

2. A board's expenditure for NTIP in 2009–10.

Boards are expected to use NTIP funding for eligible NTIP expenditures and are required to meet NTIP requirements according to legislation and the *New Teachers Induction Programs: Induction Elements Manual*, and to participate in any NTIP-related support and evaluation activities. Boards are expected to continue to submit an NTIP plan and a final report (including a detailed accounting statement) to the Teaching Policy and Standards Branch via the Ministry's regional offices.

#### **NTIP Policy Changes in 2009–10:**

- Boards may now use their NTIP funding to offer supports to second-year teachers. This expansion will assist those teachers who need more than one year of support to gain proficiency in their role. Please note that not all second-year teachers may wish, or need to take part in another year of supports.
- Boards are to include their beginning long-term occasional (LTO) teachers in the induction elements of the NTIP. For the purposes of the NTIP, a beginning LTO teacher is defined as a certified occasional teacher who is in his or her first long-term assignment, with that assignment being 97 or more consecutive school days as a substitute for the same teacher.
- Boards are encouraged to include their beginning full-time continuing education teachers in the support elements of NTIP. A beginning full-time continuing education teacher is defined as a certified teacher who is teaching 2 secondary credit courses per quad X 4 quads per year in a given school year in an adult learning day school.



## Student Transportation Grant

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This grant provides school boards with funding in order to transport students to and from home and school, including transporting students with special needs. The Student Transportation Grant is made up of five components:

- Enrolment Adjustment Component,
- Cost Update Component,
- Routing Efficiency Component,
- Fuel Escalator and De-escalator Component (new in 2009-10), and
- Transportation to Provincial Schools Component.

The total Student Transportation Grant is projected to be \$829.1 million in 2009–10.

### Enrolment Adjustment Component

For school boards with declining enrolment, no adjustment will be provided.

For school boards with increasing enrolment, the adjustment is calculated as follows:

$$\text{Enrolment Adjustment} = \left[ \begin{array}{c} 2008 - 09 \text{ Allocation for Transportation} \\ \text{less} \\ \text{Expenditures in 2008 - 09 for} \\ \text{Transportation to Provincial Schools} \end{array} \right] \times \left[ \begin{array}{c} 2009 - 10 \\ \text{Day School ADE} \\ \hline 2008 - 2009 \\ \text{Day School ADE} \end{array} \right]$$

### Cost Update Component

This component recognizes a cost increase of 2 percent for providing transportation services.

$$\text{Cost Update Adjustment} = \left[ \begin{array}{c} 2008 - 09 \text{ Allocation} \\ \text{for Transportation} \\ \text{less} \\ \text{Expenditures in 2008 - 09 for} \\ \text{Transportation to Provincial Schools} \end{array} \right] \times [0.02]$$

Boards with a transportation deficit in the 2008–09 school year will receive the cost update adjustment.

Boards with a transportation surplus in the 2008–09 school year, and a cost update adjustment that is more than their surplus will receive the difference between their surplus and the cost update adjustment.

Boards with a transportation surplus in the 2008–09 school year, and a cost update adjustment that is less than their surplus will not receive a cost update adjustment.

For the purposes of calculating the transportation surplus or deficit for this component:

- the transportation allocation for a board is the sum of the Student Transportation Grant and the transportation portion from the Learning Opportunities Grant,
- all expenditures categorized as a transportation expenditure in the Ministry’s Uniform Code of Accounts\*, and
- 2008–09 Financial Statements will be used.

## Routing Efficiency Component

This component recognizes that school boards can achieve additional efficiencies through technology use and effective route planning through the consortia delivery model and by adopting best practices identified in the transportation reforms. Beginning in the 2009–10 school year, boards that have not received a rating of "high" in the Routing and Technology section of the Effectiveness and Efficiency (E&E) reviews in transportation will be subject to this adjustment. The rating for a board participating in multiple consortia is based on the rating that forms the majority of its expenditures.

$$\text{Routing Efficiency Component} = \left[ \begin{array}{c} 2008 - 09 \text{ allocation} \\ \text{for Transportation} \\ \text{less} \\ \text{Expenditures in 2008 - 09 for} \\ \text{Transportation to Provincial Schools} \end{array} \right] \times -0.01$$

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\* The *Uniform Code of Accounts* is available from the Ministry of Education website at: <http://www.edu.gov.on.ca/eng/policyfunding/funding.html>

## Fuel Escalator and De-escalator Component

For 2009–10, the Ministry will update the cost benchmark to recognize the fuel price at \$0.90 per litre for southern school boards and \$0.92 per litre for northern school boards. This will be referred to as the "pegged price", which is net of the Goods and Services Tax (GST). For the purposes of the new Fuel Escalator and De-escalator clause, a 2 percent efficiency assumption is applied to the pegged price to take into account the ability of operators to purchase fuel in bulk or at discounted prices. Therefore, the pegged price will relate to a retail price of \$0.918 cents per litre for southern school boards and \$0.938 for northern school boards.

The GSN will establish a corridor of 3 percent above and below the adjusted pegged price. If fuel prices, as posted by the Ministry of Energy and Infrastructure website and net of GST, are above or below this corridor in any month within the fiscal year from September to June, a funding adjustment will apply. Monthly fluctuations in fuel prices within the corridor will not trigger any adjustments. The net total of the monthly funding adjustments will be applied to a board's transportation allocation twice a year. Boards should note that this adjustment could be positive or negative.

For each month from September to June in the fiscal year, the fuel price difference is calculated using the following formula:

$$\frac{A \div (1 + B) - C}{C}$$

Where:

*A* = the monthly average southern Ontario diesel benchmark rate for the month as set in the Ministry of Energy and Infrastructure website or, in the case of a northern board, the monthly average northern Ontario diesel benchmark rate for the month as set in the Ministry of Energy and Infrastructure website,

*B* = the current GST rate, and

*C* = \$0.918 or, in the case of a northern board, \$0.938.

If for any month from September to June, the fuel price difference is above three percent of the adjusted, pegged stated fuel price, the calculation for the monthly adjustment will be calculated as follows:

$$(D - 0.03) \times E \times 0.01$$

Where:

*D* is the fuel price difference,

*E* is the 2008–09 allocation for transportation less expenditures in 2008–09 for Provincial School transportation.

If for any month from September to June, the fuel price difference is 3 percent below that of the adjusted, pegged fuel price, the calculation for the monthly adjustment will be calculated as follows:

$$(D + 0.03) \times E \times 0.01$$

Where:

*D* is the fuel price difference,

*E* is the 2008–09 allocation for transportation less expenditures in 2008–09 for Provincial School transportation.

## **Funding for Transportation to Provincial or Demonstration Schools**

Funding for Provincial and Demonstration Schools transportation is allocated based on expenditures reported by the board in 2009–10, as approved by the Ministry.

Continuing with the changes that were introduced in 2006–07, the Consortium de transport scolaire d'Ottawa, served by Conseil des écoles catholiques de langue française du Centre-Est, is coordinating transportation for all students attending Centre Jules-Léger. The Ottawa-Carleton District School Board is coordinating transportation for all students attending a residential program at an English-language Provincial or Demonstration school. Transportation funding to cover these expenditures flows directly to the two boards.

School boards that provide daily transportation to an English-language Provincial or Demonstration school continue to be reimbursed, based on approved expenditures reported by the board.

## Total Student Transportation Allocation

$$\begin{aligned} & 2008 - 09 \text{ Allocation for Transportation} \\ & \quad + \\ & \quad \text{Enrolment Adjustment Component} \\ & \quad + \\ & \quad \text{Cost Update Component} \\ & \quad + \\ & \quad \text{Routing Efficiency Component} \\ & \quad + \\ & \quad \text{Sum of Monthly Adjustments for fuel} \\ & \quad + \\ & \text{Approved expenditures reported for Provincial Schools transportation} \end{aligned}$$

## Funding for Summer School Transportation

Additional allowances for transportation are included under the Learning Opportunities Grant for Literacy and Math Outside the School Day Component and Student Success, Grades 7 to 12 Component, programs. Please refer to the Learning Opportunities Grant for details (see page 68).

## Student Transportation Reform

In 2009–10, the Ministry will continue to focus on Student Transportation reforms that strengthen management capacity through:

- consultant visits to consortia workshops on best business practices;
- pilots and sector-wide training on competitive procurement processes;
- Effectiveness and Efficiency (E&E) reviews of consortia operations, service delivery, and resets of funding levels.

Once a consortium has achieved full consortium status, an Effectiveness and Efficiency (E&E) review is scheduled. The E&E reviews are conducted by third party consultants under contract to the Ministry. From December 2006 to February 2009, a total of 17 consortia sites, or 50 percent of all sites have been reviewed. As a result, \$12.6M in additional funding was provided to the boards reviewed in Phase 1 and 2A.

For the boards involved in Phase 2B and 3A, a projected \$2.5 million in-year funding adjustment to nine boards will be made through the 2008–09 GSN, subject to approval by the Lieutenant Governor in Council.

Over the next two years, E&E reviews of established consortia will continue and, based on findings and recommendations, funding adjustments will be made. Consortia that have been reviewed will have the opportunity for a follow-up review for further funding adjustments, if sites can demonstrate significant progress through the adoption of best practices and recommendation from the first E&E review.

## Declining Enrolment Adjustment

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Much of a school board's revenue is determined by enrolment. As enrolment goes down, so does revenue. This is appropriate because when there are fewer students boards no longer need the same number of teachers and other supports.

Board costs, however, do not decline in a way that is strictly proportional to declining enrolment. Some costs can be adjusted easily. For example, the cost of classroom teachers can be reduced by changing the arrangement of classes. But other costs cannot be adjusted as easily or as quickly. The Declining Enrolment Adjustment (DEA) recognizes that it takes time for boards to adjust their cost structures to declines in enrolment.

Starting in 2009–10, there are new changes to the Declining Enrolment Adjustment:

- Reducing the third component from 25 percent to 5 percent of the school board's 2007–08 DEA allocation, and,
- Eliminating the scaling factor and basing the calculation on revenue change from the same set of operating grants.

The 2009–10 DEA is made up of three components:

- first year component – \$45.5 million,
- second year component – \$24.0 million, and
- third year component – \$1.9 million.

The DEA is projected to be \$71.4 million in 2009–10.

### **Determining the 2009–10 First Year Component**

For a school board where the 2009–10 ADE is lower than the 2008–09 ADE, the “first year component” of the DEA is based on the difference between the revenue calculated under the current year's enrolment and the projected revenue if there had been no change in enrolment from the previous year.

The “first year component” is equal to the greater of zero and the difference between A and B

where,

A is the sum of the following weighting factors and grants based on 2008–09 ADE

<b>Weighting Factor</b>	<b>Grants (2009–10 Benchmarks &amp; 2008–09 ADE)</b>	
13 %	x	Pupil Foundation Grant
100%	x	Special Education per Pupil Amount (SEPPA) of the Special Education Grant
100%	x	French as a First Language (FFL) Component of the Language Grant
100%	x	Remote and Rural Allocation of the Geographic Circumstances Grant
100%	x	Per-pupil components of the Directors and Supervisory Officers and the Board Administration Components of the School Board Administration and Governance Grant
100%	x	School Operations Allocation of the Pupil Accommodation Grant

NOTES: For FFL, start-up funding for new elementary classes is excluded.

For School Operations, software licensing and funding of Section 23 facilities is excluded.

*B* is the sum of the following weighting factors based on 2009–10 ADE

<b>Weighting Factor</b>	<b>Grants (2009–10 Benchmarks &amp; 2009–10 ADE)</b>	
13 %	x	Pupil Foundation Grant
100%	x	Special Education per Pupil Amount (SEPPA) of the Special Education Grant
100%	x	French as a First Language (FFL) Component of the Language Grant
100%	x	Remote and Rural Allocation of the Geographic Circumstances Grant
100%	x	Per-pupil components of the Directors and Supervisory Officers and the Board Administration Components of the School Board Administration and Governance Grant
100%	x	School Operations Allocation of the Pupil Accommodation Grant

NOTES: For FFL, start-up funding for new elementary classes is excluded.

For School Operations, software licensing and funding of Section 23 facilities is excluded.



$$\begin{aligned} \text{DEA} & \text{ first year component based on school board's 2009–10 DEA Allocation} \\ \text{Allocation} & = \begin{aligned} & + \\ & 50\% \text{ of the school board's 2008–09} \\ & \text{First Component of the DEA Allocation} \\ & + \\ & 5\% \text{ of the school board's 2007–08} \\ & \text{First Component of the DEA Allocation} \end{aligned} \end{aligned}$$



## **School Board Administration and Governance Grant**

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The School Board Administration and Governance Grant provides funding for administration and governance costs such as operating board offices and central facilities, board-based staff and expenditures, including supervisory officers and their secretarial support.

Funding is provided through seven components\*:

- Trustees Component – \$11.1 million,
- Directors and Supervisory Officers Component – \$88 million,
- Board Administration Component – \$427.9 million,
- Reporting Entity Project Component – \$5.7 million
- Parent Engagement Funding Component – new in 2009–10 – \$3.1 million,
- Multiple Municipalities Component – \$0.3 million, and
- Internal Audit Component – new in 2009–10 – \$2.0 million.

The total School Board Administration and Governance Grant is projected to be \$538.1 million in 2009–10.

### **Trustees Component**

#### **Trustee Honoraria**

Bill 78, the *Education Statute Law Amendment Act (Student Performance), 2006*, provides a formula which establishes the maximum honorarium a board member may receive. The honorarium at each board is established in an election year by the outgoing trustees prior to October 31 and after consultation with a local citizens' advisory committee.

This funding component, which is based on the number of trustees, supports trustee honoraria, expenses, meeting costs, and professional development (for example, conferences).

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\* May not add up due to the effects of rounding.

Under the old funding approach, the funding was calculated as follows:

\$5,000	per trustee (including chair) for trustee honorarium
\$5,000	per trustee (including chair) for travel and expense allowance, professional development, and other costs
\$10,000	per board as additional honoraria for the chair and vice-chair

In 2006, the Ministry amended the formula. Under the new formula for calculating trustee remuneration, the honoraria and expense costs are calculated as follows:

base amount (\$5,900) + attendance amount (\$1,200) that assumes attendance at two committees of the board per month, which are required under the <i>Education Act</i>	per trustee (including chair and vice-chair) for trustee honoraria and attendance amount
amount (\$5,000) for chair + amount of (\$2,500) for vice-chair	per board as additional honoraria for the chair and vice-chair
distance amount (\$1,800) for boards with a jurisdiction greater than 9,000 square kilometres (as listed in Ontario Regulation 412/00, <i>Elections To and Representation On District School Boards</i> ) – funding assumes travel to two committees of the board per month, which are required under the <i>Education Act</i> , as well as travel to one board meeting per month	per trustee (including chair and vice-chair) for distance amount
enrolment amount ( $\$1.75 \times \text{ADE} \div \text{the number of trustees excluding First Nations and student trustees; native trustees receive amount equivalent to the enrolment amount received by the non-native trustees}^*$ )	per trustee (including chair) for trustee honoraria
enrolment amount ( $\$0.05 \times \text{ADE}$ , with a minimum amount of \$500 and a maximum amount of \$5,000*)	per board as additional honorarium for the chair
enrolment amount ( $\$0.025 \times \text{ADE}$ , with a minimum amount of \$250 and a maximum amount of \$2,500*)	per board as additional honorarium for the vice-chair
\$5,000	per trustee (including chair and vice-chair) for travel and expense allowance, professional development, and other costs

\* ADE = Average Daily Enrolment. The ADE figures used are those submitted by school boards through their Estimates submission from the previous school year.

Currently, the Ministry funds the full trustee honorarium calculated under the old method, plus 50 percent of the incremental cost between the new and old methods of calculating trustee honoraria. Boards provide for any additional costs.

### **Student Trustee Honoraria**

Ontario Regulation 7/07, *Student Trustees*, supplements the rights and responsibilities given to student trustees by the *Education Act*. The regulation requires district school boards to have at least one, and not more than three, student trustees. Boards pay an honorarium of \$2,500 to each student trustee and provide student trustees with the same access to compensation as the other trustees.

To assist boards, the Ministry provides the following through the School Board Administration and Governance Grant:

\$1,250	per student trustee for trustee honorarium, based on the actual number of student trustees per board
\$5,000	per student trustee for travel and expense allowance, professional development, and other costs

This approach is consistent with current provisions for other trustees where the Ministry funds 50 percent of the incremental cost of trustee honoraria.

## **Directors and Supervisory Officers Component**

Funding is based on costs for one director per board and a number of supervisory officers reflecting board enrolment. This component is intended to cover salaries and benefits of these staff. This component also recognizes the higher administrative costs incurred by some boards by using their Remote and Rural Allocation of the Geographic Circumstances Grant, the Demographic Component of the Learning Opportunities Grant, and the capital components of the Pupil Accommodation Grant\* as factors in the calculation that follows:

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\* Pupil Accommodation Grant, excluding School Operations, School Renewal, and Capital Debt Commitments.

<b>Directors and Supervisory Officers Component</b>	<b>2009–10</b>
Base amount	\$520,375.00
Per-pupil amount for first 10,000 pupils	\$13.26
Per-pupil amount for next 10,000 pupils	\$19.36
Per-pupil amount for remaining pupils	\$26.64
% Geographic Circumstances Grant (Remote and Rural Allocation)	2.17%
% Learning Opportunities Grant (Demographic Component)	0.62%
% Pupil Accommodation Grant (Capital components)	1%

## Board Administration Component

This component provides funding for the business and other administrative functions of a board and the costs of operating and maintaining board offices and facilities. As with the Director and Supervisory Officers Component, the Board Administration Component recognizes the higher costs of administration in some boards. This component covers expenses and support staff for the director and supervisory officers.

Dues to stakeholder organizations, including trustee associations, as well as support staff costs for trustees, are also funded from the Board Administration Component.

This funding supports low-enrolment boards to ensure that board administration resources and capacity are not compromised as a result of declining enrolment.

<b>Board Administration Component</b>	<b>2009–10</b>
Base amount	\$94,782.00
Base amount (per board with less than 26,000 ADE)	\$203,892.00
Per-pupil amount	\$205.31
% Geographic Circumstances Grant (Remote and Rural Allocation)	11.94%
% Learning Opportunities Grant (Demographic Component)	0.62%

<b>Board Administration Component</b>	<b>2009–10</b>
% Pupil Accommodation Grant (Capital components)	1%

Enrolment used for determining the funding is the day-school ADE of pupils of the board (JK to Grade 12, excluding pupils 21 and over).

## Reporting Entity Project Component

Funding for the Reporting Entity Project (REP) supports school boards with the costs of preparing and reporting financial information to the Province for the implementation of the generally accepted accounting standards prescribed by the Public Sector Accounting Board (PSAB).

Since 2005–06, the Ministry of Education has been working with school boards to ensure all financial information required for consolidation purposes is accurately collected, prepared, and reported. This has resulted in new reporting requirements for boards including:

- a new March reporting cycle corresponding with the Government fiscal year end,
- the requirement for boards to track and report investments in major tangible capital assets (land and buildings) to the Province, and
- the future implementation of full capital asset accounting in school board financial statements.

For 2009–10, funding for REP is projected to be \$5.7 million. The allocation method is the same as that used in 2007–08:

<b>Reporting Entity Project</b>	<b>2009–10</b>
Base amount per board	\$50,973.00
Per-pupil amount	\$1.07

## Parent Engagement Funding Component

Since 2005–06, the Province has provided Parent Engagement funding to support school boards in the implementation of a wide range of policies, programs, strategies and initiatives to involve parents. The Ministry has allocated \$3.1 million annually based on the following:

$$\$5,000 + \$0.17 \text{ per student for board parent involvement committee} + \$500 \text{ per school council}$$

In addition, any combined school with more than 300 elementary students and more than 500 secondary students receives an additional \$500.

## Multiple Municipalities Component

The Multiple Municipalities Component recognizes the additional costs for boards that are required to interact with a large number of municipalities and other local governing agencies. Boards incur administrative costs from dealing with municipalities on property tax matters. Boards are also required to reach protocols and agreements with local agencies, such as police services and children’s aid societies.

Additional funding is provided to a board with 30 or more municipalities within its jurisdiction.

Allocation Per Municipality	
# of municipalities in a board	
Fewer than 30	\$0
Between 30 and ≤ 49	$(n - 29) \times \$500$
Between 50 and ≤ 99	$[(n - 49) \times \$750] + \$10,000$
100 or more	$[(n - 99) \times \$1,000] + \$47,500$

NOTE: “n” is the number of municipalities



## Internal Audit Component

As school boards collectively manage budgets that total more than \$19 billion annually, the Government will support an increased focus on financial transparency and accountability.

Many boards do not have an internal Audit function to review and provide advice and recommendations on financial matters and risk management activities. In addition, most boards do not have an audit committee to provide a clear oversight of the policies and administrative/financial controls of the board.

The Government will provide \$2 million in 2009–10 to help boards establish audit committees and internal audit functions. This funding will grow to \$5 million annually in subsequent years. Boards will also be encouraged to establish audit committees with external representation to oversee the overall controls and effectiveness of the board process and procedures. This is an area of improvement identified during the operational reviews undertaken so far. The ministry will provide more information and direction about audit committees and their composition, and will also consult with the sector on the best approach in implementing internal audit functions.



## **Pupil Accommodation Grant**

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The Pupil Accommodation Grant has five major allocations:

- School Operations, including Community Use of Schools – \$1.88 billion
- School Renewal, including Good Places to Learn Renewal – \$435.4 million
- New Pupil Places – \$498.3 million
- Other Capital Programs – \$101.2 million

Other Capital Programs generate funding for the following estimated project values:

- Capital Priorities – \$380 million
- Prohibitive to Repair – \$835 million
- Growth Schools – \$306 million
- Primary Class Size initiative – \$716 million
- French-Language Boards – \$249 million
- Prior Capital Commitments – \$120.2 million

The total Pupil Accommodation Grant is projected to be \$3.03 billion in 2009–10. This funding addresses current accommodation pressures facing the education sector and sets the stage for longer term reform of capital funding.

## **Factors Used to Determine the Pupil Accommodation Grant**

### **Enrolment**

#### ***Elementary Enrolment***

Day School Average Daily Enrolment (ADE) of pupils enrolled in Junior Kindergarten, Kindergarten, and Grades 1 to 8.

#### ***Secondary Enrolment***

Day School ADE of pupils enrolled in Grades 9 through 12, excluding students 21 years of age and older.

### ***Adult Enrolment***

Day School ADE of students 21 years of age or older plus the ADE of students enrolled in Continuing Education credit courses during the day, excluding pupils enrolled in correspondence self-study programs, but including students in summer school programs.

### **Benchmarks**

#### ***Area Requirements Per Pupil***

##### ***Elementary (2005): 104.4 square feet (9.70 m<sup>2</sup>)***

Provides teaching and ancillary space to permit the effective delivery of elementary school programming and includes changes to recognize the increase in the number of classrooms needed for reducing primary class size and provides additional space required to accommodate the typical distribution of special education, learning opportunities, and language (e.g., ESL) programming.

##### ***Elementary (1998): 100 square feet (9.29 m<sup>2</sup>)***

Provides teaching and ancillary space to permit the effective delivery of elementary school programming consistent with the average class size limits under the *Education Act* and provides additional space required to accommodate the typical distribution of special education, learning opportunities, and language (e.g., ESL) programming.

##### ***Secondary: 130 square feet (12.07 m<sup>2</sup>)***

Provides teaching and ancillary space to permit the effective delivery of secondary school programming consistent with the average class size limits under the *Education Act* and provides additional space required to accommodate the typical distribution of special education, learning opportunities, and language (e.g., ESL) programming.

##### ***Adult: 100 square feet (9.29 m<sup>2</sup>)***

Lower than the traditional secondary school panel because less additional space is required for specialized programs.

#### ***Operating Cost***

The funding benchmark for elementary, secondary, and adult education for the School Operations Allocation is:

\$6.67 per square foot (\$71.81/m<sup>2</sup>).

#### ***Renewal Cost***

The weighted average of \$0.65 and \$0.98 per square foot (\$7.03 and \$10.54 per m<sup>2</sup>) is for schools under and over 20 years of age, respectively.

#### ***Construction Cost***

##### ***Elementary (2005): \$11.22 per square foot (\$120.77/m<sup>2</sup>)***

Represents the estimated cost of \$154 per square foot (\$1,660/m<sup>2</sup>) to design, construct, furnish, and equip new elementary schools, amortized over a 25-year period.

***Elementary (1998): \$11.00 per square foot (\$118.40/m<sup>2</sup>)***

Represents an estimated cost of \$117 per square foot (\$1,259/m<sup>2</sup>) to design, construct, furnish, and equip new elementary schools, amortized over a 25-year period.

***Secondary (2005): \$12.24 per square foot (\$131.75/m<sup>2</sup>)***

Represents the estimated cost of \$168 per square foot (\$1,811/m<sup>2</sup>) to design, construct, furnish, and equip new secondary schools, amortized over a 25-year period.

***Secondary (1998): \$12.00 per square foot (\$129.17/m<sup>2</sup>)***

Represents the estimated cost of \$126 per square foot (\$1,356/m<sup>2</sup>) to design, construct, furnish, and equip new secondary schools, amortized over a 25-year period.

The Ministry increased the capital funding benchmarks by 7 percent in 2008–09 to reflect higher construction costs and to recognize the costs of providing energy efficiency or other green school features in new schools and additions.

***Elementary (2008): \$164.78 per square foot (\$1,776.47/m<sup>2</sup>)***

Represents the estimated cost of \$164.78 per square foot (\$1,776.47/m<sup>2</sup>) to design, construct, furnish, and equip new elementary schools.

***Secondary (2008): \$179.76 per square foot (\$1,937.98/m<sup>2</sup>)***

Represents the estimated cost of \$179.76 per square foot (\$1,937.98/m<sup>2</sup>) to design, construct, furnish and equip new elementary schools.

The 7 percent increase includes:

- 4 percent basic benchmark increase; and
- 3 percent benchmark increase to support the inclusion of energy efficiency and/or green building elements.

The 7 percent increase applies to projects approved as part of the 2008–09 Capital Program as well as prior capital approvals, specifically projects not tendered by September 1, 2007, and funded through the Prohibitive to Repair, Growth Schools, and French Capital Transitional programs.

The increase does not apply to projects funded by boards from available New Pupil Places (NPP). Ministry approvals for boards to use NPP reflect estimated project costs and are not limited to Ministry benchmark costs.

***Geographic Adjustment Factor***

A Geographic Adjustment Factor (GAF) is applied to most capital allocations and the School Renewal Allocation in recognition of differences in construction costs across the province. These factors were updated in 2005.

### ***Supplementary Area Factor***

An adjustment factor is applied in the calculation of the School Operations Allocation and the School Renewal Allocation. The Supplementary Area Factor recognizes unique design features of a board's schools, such as wide hallways, large shop spaces, auditorium space, and the additional space needs of special education programs.

Separate per-pupil factors are calculated for elementary and secondary schools.

### ***Top-Up Funding***

#### ***Regular Top-Up Funding***

Additional funding is provided for school operations and renewal for schools that are operating at less than full capacity. Top-up funding is calculated on a school-by-school basis for schools offering a regular day school program (exclusive of adult day school). This additional funding, which is not to exceed the revenue generated by enrolment equal to 20 percent of school capacity, increases total revenue for school operations and renewal for a school up to the amount that would be generated if the school were operating at full capacity.

Starting in 2010–11, this top-up funding will be reduced to 18 percent, and will be further reduced to 15 percent in 2011–12. This will not impact top-up funding for schools identified or defined as “supported,” “rural,” or “distant.”

Beginning in 2010–11, top-up funding will not be provided to new schools, including schools opened in the 2009–10 school year, for the first five years of operation. This recognizes that new schools can operate more efficiently and have lower renewal needs.

#### ***Supported Schools Top-Up Funding***

Schools identified as “supported” under the Supported Schools Allocation of the Geographic Circumstances Grant, are provided with enhanced top-up funding for school operations and renewal at 100 percent of school capacity to recognize the higher per-pupil costs of cleaning and maintaining these facilities where enrolment is less than the capacity of the school (see page 60). Supported schools are not eligible for rural schools or distant schools top-up funding.

#### ***Rural Schools Top-Up Funding***

A “rural” school is a school that has an enrolment greater than zero (0), that meets at least one of the following two criteria:

- on October 31, 2009, the second character of the school's postal code is zero (0), or
- the school is listed as a rural school in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

Schools identified as “rural” are eligible for enhanced top-up funding for school operations and renewal up to 100 percent of school capacity to recognize the higher per-pupil costs of cleaning and maintaining these facilities where enrolment is less than the capacity of the school.

Rural schools are not eligible for supported schools or distant schools top-up funding.

*Distant Schools Top-Up Funding*

Schools identified as “distant” under the 2003–04 Rural Education Strategy receive an amount equivalent to that received under the 2003–04 Distant Schools top-up funding, in addition to the regular top-up entitlement. The Distant Schools top-up funding has been adjusted to take into account schools that have been opened or closed since 2003–04. Distant schools are not eligible for supported schools or rural schools top-up funding.

## School Operations Allocation

All boards receive the School Operations Allocation, which addresses the costs of operating schools, that is, heating, lighting, maintaining, and cleaning. For 2009–10, this allocation is projected to be \$1.88 billion.

The allocation is calculated separately for the elementary and secondary panels and for adult education using the following formula:

$$\begin{aligned}
 \text{Grant for School Operations} &= \text{Enrolment plus approved spaces in care, treatment \& custody programs in schools} \times \text{Benchmark Area Requirement per pupil} \\
 &+ \text{Supplementary School Area Factor} \times \text{Benchmark Operating Cost per square foot} \\
 &+ \text{Top – up funding for School Operations}^* \\
 &+ \text{Top – up funding for schools identified as supported or rural in 2009 – 10} \\
 &+ \text{Top – up funding for schools identified as distant in the Rural Education Strategy (fixed at 2003 – 04 levels)}^{**} \\
 &+ \text{Community Use of Schools} \\
 &+ \text{Allocation for Licensing \& Related Fees for Approved Asset Management Software}
 \end{aligned}$$

\* Top-up funding is available for schools that are offering a regular day school program (exclusive of adult day school) and are operating at less than full capacity.

\*\* Distant schools do not include supported schools or rural schools identified under the Geographic Circumstances Grant.

## Changes to School Operations Funding

### *Utilities and Other Costs*

To assist boards in managing the increases in energy (natural gas, electricity) and insurance costs, the Government will provide \$14.1 million in 2009–10 for a 2 percent cost benchmark update to the school operations benchmark.

### *Provincial Framework Agreements*

The School Operations Allocation reflects the 3 percent increase to salaries and benefits of the Provincial Framework Agreements. In addition, \$36 million has been provided to fund 593 additional custodian positions.



### ***Community Use of Schools Component***

In 2009–10, the Outreach Coordinators Component of the former Community Use of Schools Grant has been transferred out the GSN to link it more directly to the recruitment and hiring of Outreach Coordinators.

Now part of the School Operations Allocation, the Community Use of Schools Component supports boards in making schools more accessible for community use after regular school hours. This funding allows boards to reduce the rates for school space used by the community by helping boards with the costs involved with keeping schools open after hours such as heating, lighting, and cleaning.

In 2009–10, funding for community use of schools includes \$0.5 million to cover the cost pressures of inflation (labour and energy). Total Community Use of Schools funding in 2009–10 is projected to be \$27 million.

Board-by-board allocation under Community Use of Schools can be found in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

## School Renewal Allocation

All boards receive the School Renewal Allocation, which addresses the costs of repairing and renovating schools. For 2009–10, this allocation is projected to be \$435.4 million.

The allocation is calculated separately for the elementary and secondary school panels and for adult education using the following formula:

$$\begin{aligned}
 \text{Grant for} & & & \text{Benchmark Area} & & \text{Supplementary} & & \text{Benchmark} \\
 \text{School} & = & \text{Enrolment} & \times & \text{Requirement} & \times & \text{School Area} & \times & \text{Renewal} \\
 \text{Renewal} & & & & \text{per pupil} & & \text{Factor} & & \text{Cost per} \\
 & & & & & & & & \text{square foot} \\
 & & & & + & & & & \\
 & & & & \text{Top - up funding for School Renewal}^* & & & & \\
 & & & & + & & & & \\
 & & & & \text{Top - up funding for schools identified as supported or rural in 2009 - 10} & & & & \\
 & & & & + & & & & \\
 & & & & \text{Enhancement to address deferred maintenance needs} & & & & \\
 & & & & & & & & \\
 & & & & \text{The sum total of these 4 components} & & & & \\
 & & & & \times & & & & \\
 & & & & \text{Geographic Adjustment Factor (2005)} & & & & \\
 & & & & + & & & & \\
 & & & & \text{Top - up funding for schools identified as distant in the Rural Education Strategy} & & & & \\
 & & & & \text{(fixed at 2003 - 04 levels)}^{**} & & & & 
 \end{aligned}$$

\* Top-up funding is available for schools that are offering a regular day school program (exclusive of adult day school) and are operating at less than full capacity.

\*\* Distant schools do not include supported schools or rural schools identified under the Geographic Circumstances Grant.

## Good Places to Learn Renewal

On February 17, 2005, the Ministry announced a \$2 billion commitment to address the renewal needs for schools across Ontario under the Good Places to Learn (GPL) initiative. This funding was based on the detailed inspection of each school by building professionals completed in December 2003. The inspectors identified and prioritized 5-year renewal needs from 2003 to 2007.

In 2008–09, additional funding to support \$250 million in renewal activity was allocated fund GPL Stage 4.

***Good Places to Learn, Stage 1 Allocations***

The GPL Stage 1 funding provided boards with an allocation to support \$1 billion in renewal needs based on approximately 40 percent of their schools 2003 and 2004 high and urgent renewal needs. Any unspent Stage 1 allocations may be spent on the range of work that meets the eligibility criteria for GPL Stage 2, 3 and 4.

***Good Places to Learn, Stage 2 Allocations***

In 2006–07, GPL Stage 2 funding provided boards with an allocation to support an additional \$500 million in renewal, which is approximately 18.5 percent of the eligible renewal base, including the 5-year high and urgent renewal needs and eligible program needs, less the GPL Stage 1 allocation. Any unspent Stage 2 allocation can be spent on the range of work that meets the eligibility criteria for GPL Stage 3 and 4.

***Good Places to Learn, Stage 3 Allocations***

In 2007–08, GPL Stage 3 funding provided boards with an allocation to support an additional \$500 million in renewal, which is approximately 21 percent of the eligible renewal base, including the 5-year high and urgent renewal needs and eligible program needs, less the GPL Stage 1 and Stage 2 allocations. Any unspent Stage 3 allocation can be spent on the range of work that meets the eligibility criteria for GPL Stage 4.

***Good Place to Learn, Stage 4 Allocations***

In 2008–09, GPL Stage 4 funding provided boards with an allocation to support an additional \$250 million in renewal, which is approximately 13 percent of the eligible renewal base, including the 5-year high and urgent renewal needs and eligible program needs, less the GPL Stage 1, Stage 2, and Stage 3 allocations.

***Short-Term Financing***

The Ministry continues to fund short-term interest costs associated with the balance of Stage 1, Stage 2, Stage 3, and Stage 4 projects in the 2009–10 school year that have not been long-term financed (see Long-Term Financing for Capital Programs section below). The interest cost recognized for funding is the three-month Bankers' Acceptance (BA) rate plus 20 basis points. For boards that borrow against internal reserves to support GPL Stage 1, Stage 2, Stage 3, or Stage 4 projects, funding in 2009–10 is recognized at the three-month BA rate as of September 1, 2009.

## New Pupil Places Allocation

The New Pupil Places (NPP) Allocation provides funding to school boards to construct new schools or additions. The funding is available to boards when their total average daily enrolment (ADE) within a panel is greater than the total capacity of schools within the same panel.

In 2009–10, this allocation is projected to be \$498.3 million.

In 2005–06, the timing of entitlement provisions were introduced regarding funding for new construction through the New Pupil Places Allocation. The policy continues for funding any pupil places that are recognized as in excess of capacity. The measure provides funding for projects constructed, under construction, or for which a tender for construction has been accepted.

Beginning in 2004–05, the benchmark construction costs used in the calculation of the New Pupil Places Allocation were revised. A 2 percent increase in the construction cost benchmark was incorporated into the calculation of the New Pupil Places Allocation.

The benchmark change applies only to eligible pupil places that were constructed by boards after September 2003. The construction cost benchmark figures used when the funding formula was introduced in 1998 continue to be applied to those pupil places constructed by boards prior to October 2003.

As of February 17, 2005, the policy that allowed school boards to reduce permanent capacity of the inventory of schools used in the calculation of the New Pupil Places Allocation by disposing of surplus schools at no cost to coterminous school boards and the Ontario Realty Corporation was rescinded.

The allocation is calculated separately for the elementary and secondary panels using the following formula:

$$\text{New Pupil Places Allocation} = \text{Enrolment in excess of capacity} + \text{Pupil Places in respect of Enrolment Pressures} + \text{Pupil Places in respect of Capital Transitional Adjustments} + \text{Pupil Places in respect of Prohibitive to Repair} - \text{Pupil Places Constructed prior to October 2003}$$

The sum total of the 5 components

$$\begin{aligned} & \times \text{Benchmark Area Requirement per pupil (2005)} \times \text{Benchmark Construction Cost per Sq. Ft. (2005)} \times \text{Geographic Adjustment Factor (2005)} \\ & + \\ & \text{Pupil Places constructed prior to October 2003} \times \text{Benchmark Area requirement per pupil (1998)} \times \text{Benchmark Construction Cost per Sq. Ft. (1998)} \times \text{Geographic Adjustment Factor (1998)} \end{aligned}$$

### **New Pupil Places – Persistent Enrolment Pressures**

A board with total enrolment that is less than its total capacity for either its elementary or secondary panel is eligible for funding in recognition of persistent enrolment pressures for the respective panel if data reported in Appendix C of the Financial Statements (Top-Up Funding) indicates that:

- Enrolment at any one of the board's elementary schools or secondary schools has exceeded the capacity of the school by at least 100 pupils in each of the past two years (that is, 2007–08 and 2008–09); and
- There is not sufficient surplus capacity at nearby schools of the same panel (that is, within 8 kilometres by road to an elementary school or 32 kilometres by road to a secondary school) to accommodate the excess enrolment at the school.

For schools meeting both of these criteria, a number of pupil places equal to the average of the difference between enrolment and capacity at the school in 2007–08 and 2008–09 is recognized for funding beginning in 2009–10 and is added to the board's permanent capacity used in the calculation of the New Pupil Places Allocation in 2009–10.

## **New Pupil Places – Capital Transitional Adjustments**

Funding for new pupil places is also provided for boards to address capital transitional issues for school boards that have enrolment pressures in areas that do not have permanent accommodation or in areas where support for student retention is required.

Some boards have pupils in parts of their jurisdictions but no nearby schools. This results in parents having to choose between busing their children many kilometres to a school or sending their children to a nearby school of a different board. For boards in these circumstances, funding for new pupil places may be recognized.

## **New Pupil Places – Use of Pupil Accommodation Reserve Fund for School Sites**

Boards receiving funding to address persistent enrolment pressures at specific schools, in recognition of facilities deemed prohibitive to repair, and to address capital transitional pressures may use some of the funds in the Pupil Accommodation Reserve to purchase sites. In addition, a board that requires a school site needed to address accommodation pressures may use some of its Pupil Accommodation Reserves to fund the portion or the entire cost of acquiring the site if this cost is not a growth-related net education land cost, within the meaning of Division E of Part IX of the *Education Act* regarding education development charges.

Sites needed for pupil accommodation arising from new residential development may be acquired with the proceeds from the sale of surplus properties, savings from a board's operating budget, as part of long-term lease or partnership arrangements with municipalities or the private sector, or by imposing education development charges in accordance with Division E of Part IX of the *Education Act* and Ontario Regulation 20/98 as amended.

## **Transfers from Capital Reserves**

As of June 12, 2006, any capital projects funded through the New Pupil Places and other capital programs are subject to the Ministry's approval. As a result of this requirement, boards are advised to seek Ministry approval prior to entering into any new capital financial commitment and/or tendering a capital project. This change has been implemented as an accountability measure to ensure that boards have the financial resources to carry capital projects to completion.

## **New Pupil Places – Capital Debt Commitments**

In 2006–07 the Ministry introduced the capital debt commitments program. Boards that have received "pure" NPP funding, (i.e., funding generated by enrolment in excess of capacity) in some or all of the years from 1998–99 to 2005–06 may be eligible for capital debt commitments funding. Boards that did not receive "pure" NPP funding during this period are not eligible for capital debt commitments funding. Therefore, boards that have only received NPP funding related to fixed pupil place amounts, such as Enrolment Pressures, Capital Transitional, and Prohibitive to Repair, are not eligible for capital debt commitments funding.

The Ministry provides funding recognition for capital debt commitments that exceed a board's New Pupil Places Allocation based on the following conditions:

- The annual debt service costs for the 2009–10 academic year are related to capital debt commitments (long-term financed or not permanently financed) beginning after August 31, 1998 and no later than August 31, 2006, for capital projects constructed, under construction, or where a tender has been awarded.
- Where a board's annual debt service costs exceed a board's New Pupil Places Allocation, available funds in the board's Pupil Accommodation and Proceeds of Disposition reserves are applied to reduce the difference. The balance in the reserves, as reported in the 2005–06 Financial Statements, is used to calculate the reduction.

## **New Pupil Places – Inter-Board Transfer of Schools**

The *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation includes provisions relating to schools transferred between boards, to make more effective use of existing school facilities. Provided that the prior approval of the Ministry has been obtained, the capacity figure for a transferred school would be the lesser of ADE and the rated capacity of the facility. Transfers must meet the following criteria:

- the transfer is consistent with the boards' long-term accommodation plans;
- the transfer benefits students from both boards (for example, through improved facilities or reduced transportation needs);
- the transfer results in more effective use of existing public assets; and
- the transfer reduces the need for the boards to construct new school facilities.

This "floating" capacity, which applies only for purposes of calculating the allocation for new pupil places, remains in effect until such time as enrolment levels in the school reach the rated capacity level for the facility. After that time, the rated capacity for the facility will be used in the determination of the board's grants.

## Other Capital Allocations

Boards may receive capital allocations under other capital programs as listed below.

### Best Start

The Ministry provided capital funding for the construction of Best Start child care spaces in new schools. Capital funding was conditional on confirmation and written documentation from school boards that child care spaces at a new school had been approved by the municipality and were contained within a municipally approved Best Start Plan, and that operating funds had been committed for those spaces. Funding entitlement was based on the lesser of actual costs and the existing elementary benchmarks for the New Pupil Places Allocation increased by a factor of 1.4 to recognize the additional costs associated with the construction of child care spaces.

### Primary Class Size Reduction

Since 2005–06, funding to support primary class size (PCS) capital has been allocated to boards for the additional classrooms that were required to accommodate smaller primary classes.

A school board's primary class size space needs were reviewed, on a school-by-school basis, by the Ministry and the school board. Each school board's final PCS space needs allocation was used to calculate the total maximum primary class size capital entitlement available to a board. A school board's entitlement was determined using the following formula:

$$\begin{array}{l} \textit{Total Maximum} \\ \textit{PCS Capital} \\ \textit{Entitlement} \end{array} = \begin{array}{l} \textit{Primary Class} \\ \textit{Size Pupil} \\ \textit{Places} \end{array} \times \begin{array}{l} \textit{Benchmark} \\ \textit{Elementary Area} \\ \textit{Requirement} \\ \textit{per pupil} \\ \textit{(2005)} \end{array} \times \begin{array}{l} \textit{Benchmark} \\ \textit{Elementary} \\ \textit{Construction} \\ \textit{Cost (2005)} \end{array} \times \begin{array}{l} \textit{Geographic} \\ \textit{Adjustment} \\ \textit{Factor} \\ \textit{(2005)} \end{array}$$



## **Growth Schools**

Some school boards, as a result of significant new residential development, are facing the need for new schools that surpasses the funding available from the New Pupil Places Allocation. The Growth Schools capital program supported capital funding for boards in need of schools in areas of new residential development, but for which the New Pupil Places Allocation was insufficient.

Funding is being made available to boards that met the following criteria:

- The planned school are planned by the 2011–12 school year.
- The school was identified as part of the board's long-term capital plan.
- The planned school was projected to be at an average utilization of 80 percent or greater over a 10-year period beginning in the second year of the operation of the school.
- The board's New Pupil Places Allocation was insufficient to support the funding of this new need and/or insufficient to support debt service costs associated with new schools.
- Available funds in the board's existing capital reserves were to be applied to fully support or, if insufficient, partially support the school.
- Starting in 2008–09, school boards were no longer required to have an Education Development Charge (EDC) by-law in effect to be eligible to receive growth school funding.

## **Capital Transitional Adjustment**

The 2006–07 GSN introduced funding support over a four-year period to provide \$249 million in capital construction for French-language school boards that have enrolment needs in areas without permanent accommodation.

The 2009–10 school year is the fourth and final year of this four-year program. Approvals of projects within the full four-year program have been issued to the French-language school boards.

## **Prohibitive-to-Repair Schools**

The Prohibitive-to-Repair (PTR) capital program provides funding to support new construction to repair or replace schools in poor condition.

The Ministry had defined PTR schools as those where costs of bringing the school up to Ministry standards would be greater than 65 percent of the replacement cost of the school. This is known as the Facility Condition Index (FCI), and is a building industry standard used in calculating the facility condition. The Ministry created a preliminary inventory of approximately 200 schools across the province with an FCI of 65 percent or greater.

On October 31, 2006, the Ministry provided boards with an opportunity to add facilities and/or remove facilities on the Ministry's potential PTR candidates list since some boards indicated that the original school inspection excluded some aspects of school renewal needs, such as asbestos removal and accessibility issues.

The Ministry has provided boards with \$835 million for 105 PTR projects.

## **Capital Priorities Program**

On August 20, 2008, the Ministry of Education introduced the Capital Priorities funding program. Under this program, school boards were asked to submit business cases for their capital priorities by October 31, 2008.

The Capital Priorities program is replacing both the Growth Schools and the Prohibitive-to-Repair (PTR) capital programs. Projects that are submitted under the Capital Priorities program that are identified by boards as being either a Growth School or PTR related will be subject to the same criteria as existed under those programs. In addition, school boards have the opportunity to submit projects that would not have qualified under either of these programs, thereby allowing more types of capital projects to be eligible for funding.

## Long-term Financing Vehicle for Capital Programs

The Ministry and the Ontario Financing Authority (OFA) continue to partner to offer a provincial vehicle to provide long-term financing for construction costs incurred by school boards under the following capital programs:

- Good Places to Learn (GPL) Stage 1, Stage 2, Stage 3, and Stage 4,
- Prohibitive to Repair (PTR),
- Primary Class Size Reduction Capital (PCS),
- Growth Schools,
- Capital Transitional Adjustment for French-language boards, and
- Capital Priorities.

In addition, projects from prior year PTR and Capital Transitional Adjustment, which have not been long-term financed, are included in the new financing approach.

### Short-term financing

Boards are being reimbursed for their short-term interest costs incurred on projects that are underway.

- In 2009–10, where a board short-term finances by borrowing from its internal reserves, the Ministry recognizes these costs at the three-month Banker's Acceptance (BA) rate in effect as of September 1, 2009.
- In 2009–10, where a board short-term finances by external borrowing, the Ministry recognizes the short-term interest costs for the one-, two- or three-month BA plus 20 points.

### Long-term financing

Boards are permitted to access long-term financing for non-permanently financed projects that are supported by the above capital programs at the maximum principal amount allocated to the board by program. The maximum principal amount of the financing cannot exceed the allocations that boards receive under each of the above programs. Boards are required to ensure costs under each of these programs do not exceed the maximum allocation. Once the long-term financing has been set, the Ministry flows the actual principal and interest costs to support the financing costs.

The Ministry expects the next issuance of long-term financing to occur later in the 2009–10 school year provided that a critical mass of capital project costs have been incurred by school boards.

Boards are now able to long-term finance capital debt under the New Pupil Places program through the OFA.

## **Prior Capital Commitments**

### **Outstanding Capital Commitments**

In January 1997, the Minister of Education and Training announced a capital program for the years 1997–98 and 1998–99. In 1999–2000, the outstanding capital commitments from this program were converted to pupil places so that the amount owed to boards could be paid in the same manner as the New Pupil Places Allocation. The Pupil Accommodation Grant provides boards with funding to meet the cost of financing the outstanding grant amount over a 25-year period.

### **Debt Charges**

In 1998, the Ministry committed to provide funding in 1998–99, 1999–2000, and 2000–01 to cover the servicing costs of loans related to capital projects approved prior to May 15, 1998. This funding continues.

On June 2, 2003, permanent financing for \$891 million of the capital-related debt that had not been permanently financed was arranged by the OFA through the 55 School Board Trust. Annual payments to service this debenture is being provided to a trust through blocked accounts held by each of the 55 boards.

## **School Authorities Allocation**

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School authorities are very small school boards, usually located in remote areas of Ontario (sometimes called “isolate boards”) or in some children’s hospitals. Funding for school authorities recognizes the unique costs of operating very small schools in remote areas and in institutions.

This allocation is authorized through education funding regulations, but funding levels are not determined through the GSN regulation. School authorities’ allocations are based on education funding formulas consistent with the GSN, to the extent possible, with provisions for special approval by the Ministry of Education.

## Enrolment

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Under the school year reporting that covers the period from September to August, the calculation of average daily enrolment (ADE) is based on the existing two count dates within the school year – October 31 and March 31. The full-time equivalent of students enrolled in a board's schools are weighted at 0.5 for each of the count dates.

Junior Kindergarten (JK) and Senior Kindergarten (SK) pupils are counted as half-time students in the determination of ADE for 2009–10, with the exception of combined Kindergarten programs. The ADE regulation allows combined JK and SK programs, where JK students can be counted as enrolled for 600 minutes per week and SK students as enrolled for 900 minutes per week.

The regulation indicates that students who have been enrolled in private schools in the previous school year are eligible to be enrolled in summer school programs of a publicly funded board as permitted by the regulation.

## Fees

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Boards are required to charge tuition fees for non-resident visa students, students resident in a First Nations community, and students from out of province.

Boards are able to determine the fees that they charge in respect of visa students for regular day school programs, continuing education, and summer school programs. They must, however, charge as a minimum, the base fee calculated in accordance with the Tuition Fees regulation.

The provisions for fees in respect of pupils whose parents or guardians reside on tax exempt land has been maintained at \$40 per month per family.

The funding regulations were amended for both the 2003–04 and 2004–05 school years to provide revenue to school boards for the payment of fees when a board and First Nation band council or education authority have negotiated a reverse tuition agreement, under which pupils of the board attend a school operated by a First Nation band council or education authority. This provision is ongoing.

The *Education Act* has been amended to allow school boards to waive fees for children whose parents have applied for permanent residence in Canada and for children whose parents are studying at a publicly funded Ontario university or college.

## Reporting and Accountability

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The Ministry has established the following dates for submission of financial reports in 2009–10.

June 30, 2009	Board Estimates for 2009–10
November 13, 2009	Board Financial Statements for 2008–09
December 15, 2009	Board Revised Estimates for 2009–10
May 15, 2010	Board Financial Report for September 1, 2009 to March 31, 2010

Financial reporting, monitoring and auditing are important elements of an overall accountability framework associated with funding that is provided for education. The Ministry continues to monitor that grant claims by school boards are in accordance with the grant regulations and that school boards are in compliance with provincial standards and legislation, and funding envelopes.

In support of these objectives, the Ministry has, over the last few years, undertaken a comprehensive audit plan focussing on four main areas: enrolment, class size, English as a second language, and teacher qualifications and experience.

Some of the measures that the Ministry has taken to ensure compliance include:

- withholding grants when a board is not in compliance on class size,
- requiring boards to prepare and submit deficit management plans when necessary, and
- directing boards to take measures to become compliant.

The Ministry has provided clarification to the uniform code of accounts in Memorandum 2007: SB 21 and has implemented recommendations resulting from the review of the administration and governance expenditures.

The Ministry has assessed the information provided on spending at the program level and will eliminate this expenditure reporting for 2009–10 pending further review of information needs.

The Declining Enrolment Working Group has made several recommendations around multi-year planning so that appropriate planning around staffing and other areas can be made. As a first step to implementation, the Ministry has introduced in the 2009–10 Estimates additional schedules requiring boards to provide projections of their enrolment in 2010–11, 2011–12, 2012–13, and 2013–14. The Ministry will implement other areas where a multi-year focus will be beneficial for the sector for planning purposes.



There are currently two different measurements of a school board's surplus or deficit – one defined in the *Education Act*, which is based on principles from the cash flow approach to budgeting and financial reporting, and a revised definition based on PSAB principles, which school boards use when preparing and reporting their audited financial statements.

The Ministry will bring proposals for changing the definition of a balanced budget under the *Education Act* to better align with the Provincial approach and modernize the financial accountability framework for school boards. The framework could take effect with the 2010–11 Estimates. Its goal would be to impose consistency and transparency in boards reporting by:

- updating school board budgeting requirements to align with provincial accounting standards,
- improving the ability to manage grants separately from cash flow,
- setting new financial accountability controls based on financial results, and
- establishing new provisions related to multi-year deficit management strategies and recovery plans.

For more information on financial accountability for school boards, please refer to the Ministry's website at <http://www.edu.gov.on.ca>.

## **Enveloping, Flexibility, and Other Reporting Requirements**

Education funding is intended to model cost structures, but boards have flexibility in their actual expenditures. It is up to boards to determine their detailed budget commitments within the terms of the *Education Act* and other relevant regulations and memoranda.

Education funding recognizes that school boards need flexibility to decide how best to allocate resources within their budgets. At the same time, there are restrictions on how school boards may use certain components of their allocation. Limitations are detailed below.

School boards are accountable for how they use all the revenue that they receive from education funding grants. School boards report how they have used all their funding, and the extent to which this funding has been used for special education, classroom expenditures, new pupil places and school renewal, and administration and governance.

There are spending restrictions for boards on the use of the Special Education Grant and the New Pupil Places and School Renewal Allocations of the Pupil Accommodation Grant. There is also a spending limitation on the School Board Administration and Governance Grant.

Reporting of classroom spending relative to classroom allocations is required as in previous years.

### **Primary Class Size Reduction**

As in previous years, schools boards are required to complete a comprehensive PCS plan by the end of June, showing the projected primary class size for 2009–10. The information is to be updated in September to reflect the actual primary class size results. The board reports include current and historical class size statistics for each school with elementary grades and for the board overall. The Ministry uses the data from the actual primary class size results to populate the Class Size Tracker on the public website.

In cases where boards' plans do not meet the PCS targets, the Ministry will work with those boards to ensure that the targets are achieved in September 2009.

Boards may be subject to cash flow penalties if any of the PCS targets are not met. Once a school board reaches its PCS targets, it may use any surplus from the PCS Reduction Amount to address other needs in the elementary panel.

## **Special Education Grant**

The Special Education envelope establishes the minimum that each board must spend on special education; however, boards are free to spend more on special education programs and support. The Ministry specifies types of spending for which the grant may be used and the list of allowed costs. Boards must spend the entire amount of the special education expenditure envelope, as determined by the enveloping provisions of the regulation, for the additional costs of special education programs and support, that is, the costs above the regular costs of pupils' education supported by the Pupil Foundation Grant and the other special purpose grants. Board must place unspent special education funds in a reserve to be used for special education in the future.

## **New Pupil Places and School Renewal**

The allocations for new pupil places and for school renewal establish the minimum that each board must spend on these components. This restriction is intended to ensure that boards dedicate the resources provided for major repairs and new pupil places for the creation and renewal of safe and functional schools where students can learn.

Boards have significant flexibility on how this is done – whether through major renovation, replacement, leasing, additions, or other partnership agreements. Unspent funds in any particular year from these two allocations must be placed in a reserve. This reserve may be used in future as funding is needed to ensure the physical integrity and safety of school buildings.

## **New Teacher Induction Program (NTIP)**

Boards are expected to use NTIP funding for eligible NTIP expenditures and are required to meet NTIP program requirements according to legislation and the New Teachers Induction Programs: Induction Elements Manual, and to participate in any NTIP-related support and evaluation activities. Boards are expected to continue to submit an NTIP plan and a final report (including a detailed accounting statement) to the Teaching Policy and Standards Branch via the Ministry's regional offices.

## **Education Programs – Other (EPO)**

The Ministry provided funding outside the GSN for additional investments in library staffing. An accountability report was introduced in the Ministry forms in 2008–09 to track staffing changes after adjusting for enrolment changes. The Ministry will continue to track those changes in 2009–10.

Any significant discrepancy in expected staffing changes will be followed up by Ministry program staff with individual boards.

The Ministry will review the administration of EPO payments and reporting with the objective of providing information in a timely manner so that decisions can be reflected during board budget processes. The Ministry will also work with the sector to identify opportunities to simplify and consolidate reporting.

## **Provincial Transfers for 2009–10**

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The provincial share of education funding for 2009–10 is calculated by deducting each board's revenue from property taxes for 2009–10 from the total funding allocation determined by the education funding formulas. Tax revenue is based on 38 percent of the 2008 calendar year property taxes and 62 percent of the 2009 calendar year property taxes, plus 2008 supplementary taxes less 2008 tax write-offs.

Where there is a strike, lockout, or withdrawal of services during the 2009–10 school year, the grants will be adjusted by the net savings resulting from the strike or withdrawal of services.

For boards that include territory without municipal organization, the Ministry will permit these boards to deduct actual costs for trustee elections from property tax revenue. Boards are encouraged to enter into partnerships with other boards or adjacent municipalities to run elections efficiently.

For 2009–10, costs for tax collections by boards that include territories without municipal organization will be provided as follows: a base amount of \$50,000 plus 2 percent of taxes levied in unorganized areas. The above will only be applicable to the tax collecting board in each unorganized area.

### **Provincial Funding and Property Taxes**

Education funding determines each board's overall funding allocation. Property tax revenue provides a part of the allocation and the Province provides additional funding up to the level set by education funding.

The Government sets a uniform tax rate, based on a current-value assessment system, for all residential properties. The Government also sets property tax rates for business properties.

## **Operational Reviews in 2009–10**

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In 2009–10, the Ministry will continue to conduct operational reviews of school boards which will:

- strengthen management capacity in non-academic operations,
- highlight and leverage successful business practices, and,
- provide support and assistance to ensure that school boards are financially healthy, well-managed, and positioned to direct optimum levels of resources to support student success.

## Appendix A – Abbreviations

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ADE	Average Daily Enrolment
ALF	Actualisation linguistique en français
BA	Banker's Acceptance rate
CSD	Census Sub-Division
CUS	Community Use of Schools
DEA	Declining Enrolment Adjustment
EDC	Education Development Charges
E&E	Effectiveness and Efficiency
ELD	English Literacy Development (formerly English Skills Development (ESD))
ESL	English as a Second Language
FA	Facilities Amount
FCI	Facility Condition Index
FFL	French as a First Language
FSL	French as a Second Language
FTE	Full-Time Equivalent
GAF	Geographic Adjustment Factor
GFA	Gross Floor Area
GPL	Good Places to Learn
GSN	<i>Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year</i>
HNA	High Needs Amount
JK	Junior Kindergarten
LICO	Low Income Cut Off
LOG	Learning Opportunities Grant
LTO	long-term occasional teacher
MOV	Measure of Variability
NL	Native Language
OESS	Ontario Educational Software Service
OFA	Ontario Financing Authority
OMPF	Ontario Municipal Partnership Fund
OnSIS	Ontario Student Information System
OSR	Ontario Student Record
OTG	On-the-Ground
OTPP	Ontario Teachers Pension Plan
NTIP	New Teacher Induction Program
PCS	Primary Class Size (Reduction Amount)
PDF	Perfectionnement du français
PEG	Program Enhancement Grant
PFA	Provincial Framework Agreement
PLAR	Prior Learning Assessment and Recognition

PSAB	Public Sector Accounting Board
PTR	Prohibitive-to-Repair
ReCAPP	Renewal Capital Asset Planning Process
REP	Reporting Entity Project
RSCA	Rural and Small Community Allocation
RSCI	Rural and Small Community Index
SEA	Special Equipment Amount
SEPPA	Special Education Per-Pupil Amount
SIP	Special Incidence Portion
SK	Senior Kindergarten
TPE	Transitional Program Equivalency



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Education Funding

**Technical Paper  
ADDENDUM**

**Provincial Framework Agreement  
Between  
The Elementary Teachers' Federation of Ontario  
and  
The Ontario Public School Boards' Association**

2009–10

Spring 2009  
Ministry of Education



## **Provincial Framework Agreement – Elementary Teachers’ Federation of Ontario and Ontario Public School Boards’ Association**

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This Addendum provides the applicable benchmarks and formulae to support the Provincial Framework Agreement (PFA) negotiated between the Elementary Teachers’ Federation of Ontario (ETFO) and the Ontario Public School Boards’ Association (OPSBA). For school boards with collective agreements that conform to this PFA, the benchmarks and formulae in the Addendum replace those in the body of the *Technical Paper 2009–10*.

## Pupil Foundation Grant

Pupil Foundation Grant – ELEMENTARY	# staff per 1,000 students		benchmark salary + % benefits	\$ per pupil for supplies and services	\$ allocation per pupil
Classroom Teacher Class size 24.5:1	Classroom Teacher	40.82	67,367 + 11.34%	\$117.11	\$3,061.76
	Specialist Teacher	0.56			\$42.00
	Preparation Time	6.08			\$456.04
	Supply Teacher				\$117.11
	Staff Development*				\$117.11
Education Assistants	0.20	34,379 + 24.00%		\$8.53	
Elementary Supervision			\$26.61	\$26.61	
Professional Learning			\$7.24	\$7.24	
Textbooks and Learning Materials			\$69.00	\$69.00	
Classroom Supplies			\$82.82	\$82.82	
Classroom Computers			\$34.52	\$34.52	
Library and Guidance Services	Teacher-Librarian	1.31	67,367 + 11.34%	\$117.11	\$98.11
	Guidance Teacher	0.20	67,367 + 11.34%		\$15.00
Professional/Para-Professional Supports		1.73	54,385 + 19.00%		\$111.96
Classroom Consultants		0.48	92,736 + 11.10%		\$49.45
<b>TOTAL Pupil Foundation Grant (Elementary)</b>		<b>51.38</b>		<b>\$337.30</b>	<b>\$4,180.15</b>

Note: Pension plan contributions for teachers and eligible members of OTPP are matched by the Government and are not included in the benchmark salaries and benefits.

\* One-time constraint in 2009–10; funding to be restored in 2010–11.



## Grade 4 to 8 Class Size Reduction Component

The Grade 4 to 8 Class Size Reduction per-pupil amount in 2009–2010 is \$13.50

<b>Pupil Foundation Grant – Grade 4 to 8 Class Size Reduction</b>	<b># staff per 1,000 students</b>		<b>benchmark salary + % benefits</b>	<b>\$ per pupil for supplies and services</b>	<b>\$ allocation per pupil</b>
Classroom Teacher	Classroom Teacher	0.18	67,367 + 11.34%		\$13.50

## Primary Class Size Reduction Amount

The PCS Reduction Component is calculated by multiplying the 2009–10 average daily enrolment (ADE) of pupils enrolled in Junior Kindergarten to Grade 3 by \$839.11.

## Special Education Grant

### Special Education Per Pupil Amount (SEPPA)

The SEPPA amounts for 2009–10 are:

\$739.95 per JK to Grade 3 student

\$569.62 per Grade 4 to 8 student

## Language Grant

### French as a Second Language (FSL) – Elementary

Average daily length of program		Allocation per pupil enrolled in the program
20 – 59 minutes	(Core, Grades 4 to 8)	\$275.28
60 – 149 minutes	(Extended, Grades 4 to 8)	\$313.64
150 minutes or more	(Immersion, Grades 1 to 8)	\$350.86
75 minutes or more	(Immersion, JK and K)	

### English as a Second Language

#### *Recent Immigrant Component*

$$\begin{array}{r}
 \text{Recent Immigrant} \\
 \text{Component}
 \end{array}
 =
 \begin{array}{r}
 \text{Total number of weighted} \\
 \text{recent immigrant Elementary pupils}
 \end{array}
 \times \$3,618
 \text{ plus }
 \begin{array}{r}
 \text{Total number of weighted} \\
 \text{recent immigrant Secondary pupils}
 \end{array}
 \times \$3,682$$

## First Nations, Métis, and Inuit Education Supplement

### Native Language (NL) – Elementary

Average daily length of program	Staff per 8 elementary students	Allocation per pupil enrolled in the program
20 – 39 minutes	0.2	\$1,875.16
40 minutes or more	0.3	\$2,812.74

## Geographic Circumstances Grant

### Remote and Rural Allocation

#### *Board Enrolment - Elementary*

<b>Enrolment</b>	<b>Elementary Per-Pupil Amount</b>
0 to < 4,000	\$310.52 – (Day School ADE x 0.01686)
4,000 to < 8,000	\$243.07 – ([Day School ADE – 4,000] x 0.01937)
8,000 or more	\$165.60 – ([Day School ADE – 8,000] x 0.02071)

#### *Distance/Urban Factor*

$$\begin{aligned}
 \text{Distance / Urban} \\
 \text{Allocation} &= \left( \begin{array}{l} \text{Elementary per pupil} \\ \text{amount based on} \\ \text{distance} \end{array} \times \text{Elementary ADE} \times \begin{array}{l} \text{urban} \\ \text{factor} \end{array} \right) \\
 &+ \left( \begin{array}{l} \text{Secondary per pupil} \\ \text{amount based on} \\ \text{distance} \end{array} \times \text{Secondary ADE} \times \begin{array}{l} \text{urban} \\ \text{factor} \end{array} \right)
 \end{aligned}$$

<b>Distance</b>	<b>Elementary Per-Pupil Amount</b>
0 to < 151 kilometres	\$0
151 to < 650 kilometres	\$1.05936 x (D–150)
650 to < 1,150 kilometres	\$529.68 + [\$0.14258 x (D–650)]
1,150 kilometres +	\$600.97

<b>Distance</b>	<b>Secondary Per-Pupil Amount</b>
0 to < 151 kilometres	\$0
151 to < 650 kilometres	\$1.06746 x (D–150)
650 to < 1,150 kilometres	\$533.73 + [\$0.14366 x (D–650)]
1,150 kilometres +	\$605.56

$$\text{Dispersion Allocation} = \frac{(2009-10 \text{ Elem ADE}) \times (\$5.57401 / \text{pupil}) \times \left( \frac{\text{Dispersion}}{\text{Factor}} - 14 \text{ km} \right)}{(2009-10 \text{ Sec ADE}) \times (\$5.56166 / \text{pupil}) \times \left( \frac{\text{Dispersion}}{\text{Factor}} - 14 \text{ km} \right)}$$

Each board's average school dispersion distance is set out in the *Grants for Student Needs – Legislative Grants for the 2009-2010 School Board Fiscal Year* regulation.

## Supported Schools Allocation

### *Elementary Supported Schools*

Supported School Size (2009–10 ADE)	Funding (using 2009–10 ADE)
ADE ≥ 1 and ADE < 50	\$65,056.59 + (ADE x \$6,390.03)
ADE ≥ 50 and ADE < 150	\$562,548.16 - (ADE x \$3,559.80)
ADE ≥ 150	\$28,577.45

## Cost Adjustment and Teacher Qualifications and Experience Grant

### Teacher Qualifications and Experience Component

$$\left( \text{Sum of} \left[ \frac{\text{Elementary teachers on board's regular grid} \times \text{Instructional salary matrix}}{\text{Number of elementary teachers on board's regular grid distribution}} - 1 \right] \times \text{Elementary Q\&E benchmark} (\$3,672.91) \times \text{Elementary ADE} \right) + \left( \text{Sum of} \left[ \frac{\text{Elementary teachers on board's regular grid} \times \text{Instructional salary matrix}}{\text{Number of elementary teachers on board's regular grid distribution}} - 1 \right] \times \text{Grade 4–8 per-pupil amount} (\$13.50) \times \text{Grade 4–8 ADE} \right)$$