



Budget Advisory Committee
Thursday, February 23, 2023 6:00-8:00p.m.
Tolmie Boardroom, 556 Boleskine Road

AGENDA

- 1. Call to Order (2 min)**
- 2. Acknowledgement of Traditional Territories**
The Greater Victoria School District wishes to recognize and acknowledge the Esquimalt and Songhees Nations, on whose traditional territories, we live, we learn, and we do our work.
- 3. Approval of Minutes February 9, 2023** Pages 2-5
- 4. Department Profile Discussions**
 - a. Information Technology for Learning (10 min) Pages 6-11
 - b. Human Resource Services (10 min) Pages 12-18
 - c. Financial Services (10 min) Pages 19-26
- 5. Custodial Services Options (25 min)**
- 6. 2022-2023 Operating Surplus Estimate (2 min)**
- 7. 2023-2024 Structural Deficit Estimate (2 min)**
- 8. Operating Capital Reserves (5 min)**
 - a. Childcare Capital Reserve
 - b. Technology Replacement Reserve
 - c. Student Device Replacement Reserve
 - d. Network Infrastructure Plan (Year 3 of 5)
- 9. Building Consensus – Small Group Discussions/Share Out**
 - a. Operating Surplus and Operating Reserve (15 min)
 - b. Operating Capital Reserves (15 min)
 - c. Custodial Services Options (20 min)
- 10. Work Plan (2 min)**
- 11. Questions (2 min)**
- 12. Next Meeting: March 2, 2023 6pm via Zoom**
- 13. Adjournment**



**Budget Advisory Committee
MINUTES
Thursday, February 9, 2023
Via ZOOM**

In Attendance:

Board of Education:

Trustees Nicole Duncan (Committee Chair), Karin Kwan, Natalie Baillaut, Angela Carmichael, Diane McNally

Staff:

Deb Whitten, Superintendent
Harold Caldwell, Deputy Superintendent
Tom Aerts, Associate Superintendent
Katrina Stride, Secretary-Treasurer
Julie Lutner, Associate Secretary-Treasurer
Marni Vistisen-Harwood, Director of Facilities Services
Andy Canty, Director of Information Technology for Learning
Hervinder Parmar, Director of Finance, Budgets and Financial Reporting
Jim Vair, Director of Human Resource Services
Dr. Jeff Davis, Director of International Education
Lisa McPhail, Manager of Communications and Community Engagement
Connor McCoy, Past President, Greater Victoria Principals Vice-Principals Association
Gautam Khosla, Executive Member, Greater Victoria Principals Vice-Principals Association
Mark Baggott, Manager, Building Operations
Justin Taylor, Manager, Building Maintenance
Eric Fischer, Manager, Transportation, Fleet and Grounds
Mora Cunningham, Manager, Major Capital Projects
Mark Peaty, Manager, Minor Capital
Archie Fraser, Manager, Network and Communications

Stakeholders:

Paula Marchese, VCPAC
Rachel McLellan, VCPAC
Ezekiel Gow, GVTA
Cindy Romphf, GVTA
Jane Massy, CUPE 947
Trina Legge, CUPE 382
Darren Reed, CUPE 382

Acknowledgement

Committee Chair Duncan recognized and acknowledged the Esquimalt and Songhees Nations on whose traditional territories we live, we learn, and we do our work.

Approval of Minutes

By consensus, the Committee approved the minutes from the January 19, 2023 meeting with one amendment. The name of the GVTA representative in attendance was Ezekiel Gow.

Student Participation

a. Representative Advisory Council of Students Meeting – January 9, 2023

Secretary-Treasurer Stride provided the Committee with the report from the Representative Advisory Council of Students meeting held on January 9, 2023. There were 5 students from Secondary schools in attendance. Students were presented with three topics related to budget and notes taken during their discussion were included in the report.

b. Student Symposium Event – January 13, 2023

Associate Superintendent Aerts provided the Committee with the report from the Student Symposium Event held on January 13, 2023. There were 66 students from Middle and Secondary schools in attendance. Included in the report was the agenda package, worksheet with budget simulation outcome for each table, and notes from students for each topic.

A question was asked by the Committee about the redaction of student and school names in the Student Symposium Report. It was explained that the report is not intended to highlight issues at specific schools, but to highlight the priority issues for students at all schools.

Music

Secretary-Treasurer Stride presented the Committee with an overview of music in the District. Topics included Elementary Strings and Middle School Music historical staffing since 2007-2008; Elementary Strings FTE allocation and cost for the past 3 years; Elementary schools offering music in prep; Middle School Music FTE allocation for the past 3 years; Middle School budget allocation for 2022-2023 by funding source; Middle schools offering music in exploratory; and the District ukulele, drumming and instrument repairs FTE allocation and cost for 2022-2023. Secretary-Treasurer Stride, Deputy Superintendent Caldwell, Associate Secretary-Treasurer Lutner, and GVTA representative Cindy Romphf responded to questions from the Committee regarding the presentation.

Questions and comments following the presentation included:

- What has been the effect of cuts to music? Have we been able to measure?
 - Each school community has made their own decision as to how to allocate music FTE
- Tell me more about the District Ukulele program
 - Based out of Oak Bay High School and run by GVTA member, Tina Horwood. It is one block held at 5pm and is offered to Elementary, Middle and Secondary students.
- If strings were added into prep, what would that look like?
- Grade 7-8 band had to merge and numbers went up
- Would be good to know the impacts at each Middle school

- Where does the money for music come from if not in exploratory?
 - Exploratory is part of classroom teachers' prep; schools not offering music in exploratory have chosen to offer something other than music; the music FTE allocation and music in exploratory are separate programs; music in exploratory is music on top of regular staffing
- What other information would be required?
- There is lower participation at some schools
- Offering within schedule; some Principals are not interested; brings up equity issues of offered outside school hours
- How would offering music in prep time work?
- Answer the questions that have been asked in the letter from the GVTA outlining the challenges of offering music in prep time
- Mandatory program if offered in prep vs. program of choice if offered as line item in budget
- Schools where numbers dropped when music moved to outside school day:
 - Strawberry Vale: 30 to 4
 - Hillcrest: 40 to 24
 - Cloverdale: 53 to 27
 - Willows: 87 to 60
 - Marigold: 36 to 18
- Explore options of what Middle School music would look like with budget added back in
- Bands are bigger now; cuts happened during COVID; previously 60-70 at grade 6 and now 110
- Could we look at options, such as status quo, recover to prior year, and half way between current year and prior year?
- Three schools not participating in Strings; need more information on why not participating; is there another program that might meet needs?
 - Sundance-Bank doesn't have grade 5 yet; so only 2 schools; will ask the schools
 - Could they do something other than strings, such as reading music, other another item included in curriculum, to make it equitable across all Elementary schools?
- Needs to be a collective/collaborative process, e.g. staff committee, if using prep time
- There was a 20% reduction in Middle music at each school in 2022-2023
- Strings in prep as a trial for one year is an example of something we could do

Department Profile Discussion

Each of the following departments presented a brief overview of their area(s) of responsibility and responded to questions from the Committee regarding their presentation and department profiles.

- Marni Vistisen-Harwood, Director, Facilities Services
- Lisa McPhail, Manager, Communications and Community Engagement
- Dr. Jeff Davis, Director, International Education

Consensus – What is it?

The Committee was provided with information regarding consensus decision making, as the Committee is required to use consensus building in making recommendations to the Board. If the Committee is not able to reach consensus, differing viewpoints will be shared.

Work Plan

The Committee reviewed the draft work plan for upcoming meetings including topics of interest, department reviews, and consensus building towards making recommendations to the Board.

Take Away and Questions

The following comments were received in response to the question if the March 2, 2023 BAC meeting should be held online or in person:

- In person is always my choice. Have a good night!
- Able to do both online and in person
- Always happy to meet in person
- Prefer to alternate, if possible
- Happy to work toward consensus via Zoom
- Happy to meet in person
- Either via Zoom or in person would work for me
- Happy to meet in person or Zoom

There were no responses to the question of what is your biggest takeaway from this meeting. There were no questions from the Committee.

Next Meeting: February 23, 2023 6pm-8pm in person

Adjournment

The meeting adjourned at 8:02 p.m.

Department Profile – Information Technology for Learning

1. Department (description of primary work of the group):

- Please use this link to access our Department Profile: <https://docs.google.com/document/d/1bF-3OBtxOv59rIR6Aoh9cZYGo5UyQO53f886YaYixzU/edit?usp=sharing>

2. Staff Name(s), Position(s), FTE & Affiliation:

School Technologist – 1.0 – CUPE 947
Server Administrator (Systems Analyst) – 1.0 – CUPE 947
Server Administrator (Systems Analyst) – 1.0 – CUPE 947
District Vice Principal – 1.0 – PVP
Application Support Specialist (Systems Analyst) – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
Director – 1.0 – Exempt
School Technologist – 1.0 – CUPE 947
Sr. Student Systems and Data Analyst – 1.0 – CUPE 947
Digital Content Publisher – 1.0 – CUPE 947
Student Systems and Data Analyst – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
Current Posting – School Technologist – 1.0 – CUPE 947
Endpoint Management Specialist (Systems Analyst) – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
Endpoint Management Specialist (Systems Analyst) – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
Senior Cyber Security Analyst – 1.0 – Exempt
Network Administrator (Systems Analyst) – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947
Server Administrator (Systems Analyst) – 1.0 – CUPE 947
IT Support Specialist – 1.0 – CUPE 947
1.0 – CUPE 947
ITL Support Team Leader – 1.0 – CUPE 947
Network Administrator (Systems Analyst) – 1.0 – CUPE 947
Manager – 1.0 – Exempt
Developer and Business Analyst – 1.0 – Exempt
IT Support Specialist – 1.0 – CUPE 947
Student Systems and Data Analyst – 1.0 – CUPE 947
School Technologist – 1.0 – CUPE 947

Department Profile – Information Technology for Learning

3. Select as Applicable:

- ☐ Allied Specialists' Association (ASA)
- ☐ CUPE 382
- ☒ CUPE 947
- ☐ Counsellor
- ☐ Teacher
- ☒ P/VP
- ☒ Exempt
- ☐ Other

4. Student FTE as per 1701 / Other Numbers of Students Supported / Served:

20014 (100%)

5. Budget (Operating and/or Special Purpose Funds):

Total Salaries and Benefits - 2,481,000
Maintenance - Hardware - 110,000
Maintenance - Software - 993,000
Hardware Purchases - 103,000
Professional Development and Training - 23,000
Technology for Learning - 180,000
Telecommunications - 24,000
Office supplies, photocopying, printing, mileage, fees - 51,000
Technology Infrastructure - 503,000
Print Device Replacement - 243,000
Total - 4,710,000

Please see the attached Budget for additional information.

6. Student / Family Support (description of work for students & families):

Supporting classroom technology.
Fit for purpose devices.
Technical support for students through the classroom teacher.
Digital services for parents through the school websites and the Parent Connect portal.
Attendance management and absence notification to parents.
Privacy assessments to digital tools to keep student and parent data safe.
Network security for safe browsing,
BYOD (bring your own device) wireless network for students.
Chromebook and iPad loans for families in need through the pandemic.

Department Profile – Information Technology for Learning

7. School Support (description of work for staff, P/VP, etc.)

Supporting school technology.
Fit for purpose devices, the tools to do the job.
Repairs and replacements.
Professional development on applications and processes.
Network security for safe browsing.
Technology integration of applications and databases.
Data governance.
Student Information System support.
1701 funding collection support.
School website support.
eSports online gaming setup for high schools.
Computer labs for coding, video, and multimedia.
Authorized access to files and services.
Data dashboards regarding student achievement and belonging.

8. District Support (cross-department, FESL, Ed Policy, Admin Mtgs., etc.):

Technical support.
Digital project scoping, planning and implementation.
Data analytics and data governance.
Vendor management and support escalation with third-party providers.
Providing and maintaining hardware and software.
Network security and performance.
Forensics and investigations.
Authorized access to files and applications.
Integration with other district systems.
Access anywhere cloud services on-demand.
Project management and team collaboration.
Video conferencing and live streaming.
Digital communications.

9. Community & Interagency Partnerships:

Collaborative ProD (e.g. Assistive technology workshop for School Technologists).
Provisioning and supporting devices (e.g. iPads for Elders).
Nations LEA data reporting.
Student centered application development with outputs for communities.
Virtual meeting facilitation.
Data reports and analysis.
Collaboration platforms and project planning.
Digital communications.

Department Profile – Information Technology for Learning

10. Ministry of Education and Child Care Directives:

Children and Youth In Care reporting (internally developed application).
Data analytics.
FOIPPA compliance (Freedom of Information and Protection of Privacy Act).
Data governance.
Network security to provisional standard.
1701 funding data collection management and support.
MyEducation BC training and support.
Catchment boundary reporting.
Class size and enrolment projections reporting.
Privacy Management Program implementation and support.
Reporting Order training and support.

11. Alignment with the District Strategic Plan:

- ✓ **Goal 1:** Create an inclusive and culturally responsive learning environment that will support and improve all learners' personal and academic success.
- ✓ **Strategy 1:** *Develop and support high quality learning opportunities through the implementation of curriculum in order to improve student achievement.*
- ✓ **Strategy 2:** *Engage and collaborate with students, families and staff to provide an inclusive learning environment that will enhance and support student learning, identities and well-being.*
- ✓ **Strategy 3:** *Address the inequity of outcomes for diverse learners in literacy, numeracy, engagement and completion rates.*
- ✓ **Goal 2:** Create a culturally responsive learning environment that will support Indigenous learners' personal and academic success.
- ✓ **Strategy 1:** *Critically examine personal and systemic biases, attitudes, beliefs, values and practices to increase student and staff understanding and appreciation of Indigenous worldviews, histories and perspectives.*
- ✓ **Strategy 2:** *Engage and collaborate with local Nations, Indigenous educators, Indigenous community leaders, Elders and families to enhance Indigenous student learning and well-being and identity.*
- ✓ **Strategy 3:** *Address the inequity of outcomes for Indigenous learners in literacy, numeracy, attendance and graduation rates.*
- ✓ **Goal 3:** Create an inclusive and culturally responsive learning environment that will support all learners' physical and mental well-being.
- ✓ **Strategy 1:** *Continue to provide professional learning opportunities to all staff in K-12 to further support implementation of social emotional learning, physical literacy and mental health literacy that improves outcomes for students and classrooms.*
- ✓ **Strategy 2:** *Work in collaboration with Ministry of Children & Family Development to provide joint educational planning and support for children and youth in care that helps develop the child's personality, talents and mental and physical abilities to the fullest for current and future success.*
- ✓ **Strategy 3:** *Engage and collaborate with families to encourage awareness of and engagement in physical literacy and mental health literacy that improves outcomes for students in classrooms and at home.*
- ✓ **Strategy 4:** *Address the inequity of opportunity for all learners to maximize physical health and mental well-being.*

Department Profile – Information Technology for Learning

12. **Data (FESL, Student Learning Survey, Participation Rates, etc.):**

The IT for Learning Department facilitates information management and data requests for all aspects of the school system. FESL dashboards via PowerBI for school growth plans, Student Learning Survey dashboards for school review, FESL dashboards for FESL reporting and trends analysis, MyEducation BC training and support for marks, course credits, withdrawals, graduation rates, etc.

Information Technology for Learning

Budget FY 2022-2023

				<u>\$000</u>
STAFF:	29.7 FTE			
Director of ITL	1.0	Principal		1.0
Developer/Business Analyst	1.0	Clerical		1.0
Senior Cyber Security Analyst	1.0	Student System Analyst		3.0
Manager, ITL	1.0	Digital Content Publisher		1.0
Systems Analyst	7.0	IT Team Leader		2.0
School Tech	8.7	Help Desk		2.0
Total Salaries and Benefits				2,481
EXPENSES:				
Maintenance - Hardware				110
Maintenance - Software				993
Hardware Purchases				103
Professional Development and Training				23
Technology for Learning				180
Telecommunications				24
Office supplies, photocopying, printing, mileage, fees				51
Technology Infrastructure				503
Print Device Replacement				243
				<u>4,710</u>

Department Profile – Human Resources Services

1. Department (description of primary work of the group):

The primary work of the Human Resource Services Department includes, but is not limited to, the following four areas. Additional details of the work in each of these areas is included in the response to question 7 (re school support) below. Human Resource Services is a client/customer service-focused department whose activities in the following primary areas supports the District's staff, administrators, applicants and unions in ensuring that matters relating to human resources are addressed, thereby ensuring that students are supported in their educational learning.

The primary work of the Department includes the following four areas:

- Staffing (including: the recruitment, retention and internal movement (though postings, where applicable) of teachers [GVTA members], support staff [CUPE 947 and 382 members], professional staff [ASA members], administrators [Principals and Vice Principals] or exempt staff; and replacing absent staff);
- Labour Relations (including: investigations for harassment and bullying between staff; collective agreement interpretation; grievance administration; and collective bargaining);
- Occupational Health and Safety (including: WCB claims management; workplace injuries; the violence prevention program/occupational-related violence; and District and school-based occupational health and safety committees); and
- Attendance Support, Disability Management and Wellness (including: attendance support; the Attendance Management Program; disability management [for illnesses and non-occupational injuries]; and wellness support, including the Employee and Family Assistance Program).

2. Staff Name(s), Position(s), FTE & Affiliation:

All 14 positions in the 2022/23 Budget are full-time (1.0 FTE) positions. Eight of the positions are exempt staff [seven exempt staff plus a Principal] and six of the positions are in CUPE 947.

3. Select as Applicable:

- ☐ Allied Specialists' Association (ASA)
- ☐ CUPE 382
- ☒ CUPE 947
- ☐ Counsellor
- ☐ Teacher
- ☒ P/VP
- ☒ Exempt
- ☐ Other

Department Profile – Human Resources Services

4. **Student FTE as per 1701 / Other Numbers of Students Supported / Served:**

Not directly applicable.

5. **Budget (Operating and/or Special Purpose Funds):**

The 2022-23 budget for Human Resource Services includes \$1,527k for salaries and \$1,967k for expenses. For additional details, see the additional documentation re the budget provided by the Finance Department.

6. **Student / Family Support (description of work for students & families):**

The Human Resource Services Department has the primary responsibility for the hiring and retention of all staff within the District including staff in schools that work with and support students, thereby ensuring that students are supported in their educational learning. The Department also supports administrators when staff working with students have performance/employment-related concerns and other matters arise under the collective agreements that are in place and which govern the employment of such staff.

7. **School Support (description of work for staff, P/VP, etc.)**

Staffing:

o Staffing - Educational Staffing & Systems – GVTA and ASA:

- Collective Agreement Interpretation (GVTA)
- Confirmation of Job Postings and Hiring (GVTA)
- Excess to Needs and Lay-off Questions (GVTA)
- FTE Calculation assistance (GVTA)
- FTE Entitlement, Seniority, and Qualifications (GVTA)
- Leave Requests and On-line Leave Intentions Forms (GVTA)
- Recruitment & Hiring Fairs (GVTA)
- Applications for TTOC
- GVTA posting recommendation processing
- Interview Scheduling for Teachers and TTOCs
- Postings (GVTA)
- TRB Certificates and Category Cards
- General Inquiries about the Remedy and D.2.9 App
- Collective Agreement as it pertains to Staffing and School Organization
- Educational Staffing – general matters/questions
- Educational Staffing Recruitment
- Qualifications for Postings
- Restored Contract Language (D.2.9 and Remedy), including Restored Contract Language Interpretation
- School Organization Questions
- Assistance with teacher assignment schedules (GVTA)
- Employment verification for GVTA
- Teacher Staffing Notifications queries (GVTA)
- Staffing notifications (GVTA)
- Teaching experience, salary level, seniority port in/port out, sick leave in/out (GVTA)
- TQS Upgrades (GVTA)
- Staffing matters related to ASA positions
- Criminal Record Checks
- Name and Demographics Changes

Department Profile – Human Resources Services

o Staffing - CUPE 947, CUPE 382 and Exempt Staff:

- Allocation of Hours and Qualifications (Elementary CUPE 947)
- Collective Agreement Interpretation (CUPE 947 and CUPE 382)
- Leave Requests (CUPE 947 and CUPE 382)
- Post and Fill and Lay-off Questions (CUPE 947 and CUPE 382)
- Recruitment, Hiring, and Retention (CUPE 947 and CUPE 382)
- Practicum Placements (CUPE 947)
- Employment Verification (CUPE 947)
- Assignment/leave questions, change in hours/schedules, probation/appraisal review (CUPE 947)
- Long Service Leaves (CUPE 947)
- Postings (CUPE 947)
- Staffing Notifications (CUPE 947)
- Assignment/leave questions, change in hours/schedules, probation/appraisal review (CUPE 382)
- Employment verification (CUPE 382)
- Staffing Notifications (CUPE 382)
- Postings (CUPE 382)
- Long Service Leaves (CUPE 382)
- Staffing matters related to exempt positions
- Contracts for P/VP, Exempt Staff, Allied Specialist, and Term Contract Employees
- Employment verification P/VP, Exempt Staff, and Allied Specialist
- Criminal Record Checks
- Name and Demographics Changes

o Staffing - Dispatch/Absences (Automated Dispatch System (ADS)):

- ADS help desk and ADS support
- Assisting SAA3s and Admin. with replacement concerns
- Availability Questions
- GVTA and CUPE 947 General Dispatch Questions
- Employment Standards Act (ESA) Sick Days Support
- Payroll Reconciliation Matters

Labour Relations:

- Collective Agreement interpretation (GVTA, CUPE 382, CUPE 947 and ASA)
- Labour and Contract Issues (GVTA, CUPE 382, CUPE 947 and ASA)
- Employee Performance Issues (GVTA, CUPE 947, CUPE 382 and ASA)
- Investigations (for Harassment and Bullying)
- Grievance Administration, including mediation and arbitration
- Collective Bargaining (GVTA, CUPE 382, CUPE 947 and ASA)

Occupational Health and Safety:

- District Health and Safety Committee
- Violent and Non-violent Incident Protocols for employees/Violence Prevention Program
- WCB "Gradual Return to Work" planning
- WCB claims management
- Workplace injuries
- Work Refusal Process (declaration of unsafe work)
- First aid attendants and JOHS members training

Department Profile – Human Resources Services

Attendance Support, Disability Management and Wellness:

- Attendance Support
- Disability Management
- Medical Leaves and Medical Absences (Non-WCB)
- Wellness Support and Resources, including Employee and Family Assistance Program

8. **District Support (cross-department, FESL, Ed Policy, Admin Mtgs., etc.):**

See the answer to question 7 above.

9. **Community & Interagency Partnerships:**

Human Resource Services works with Camosun College on the EA bridging program which assists in addressing some of the employee shortages. The Department also participates in local job fairs organized by community organizations and others. The Department also works with BC's Office of the Human Rights Commissioner for Special Programs under section 42 of the BC Human Rights Code for the Preferential Hiring of Indigenous and racialized candidates. The Department works with WorkSafeBC on matters related to occupational health and safety of staff. Finally, the Department works closely with BCPSEA on matters related to collective bargaining and on matters related to the collective agreements, including grievances and arbitrations, where appropriate.

10. **Ministry of Education and Child Care Directives:**

Human Resource Services works with the Teacher Regulation Branch (TRB) of the Ministry of Education and Child Care on matters related to teacher performance concerns, as necessary and appropriate.

Department Profile – Human Resources Services

11. Alignment with the District Strategic Plan:

- ☒ **Goal 1:** Create an inclusive and culturally responsive learning environment that will support and improve all learners' personal and academic success.
 - ☐ **Strategy 1:** Develop and support high quality learning opportunities through the implementation of curriculum in order to improve student achievement.
 - ☐ **Strategy 2:** Engage and collaborate with students, families and staff to provide an inclusive learning environment that will enhance and support student learning, identities and well-being.
 - ☐ **Strategy 3:** Address the inequity of outcomes for diverse learners in literacy, numeracy, engagement and completion rates.
- ☒ **Goal 2:** Create a culturally responsive learning environment that will support Indigenous learners' personal and academic success.
 - ☐ **Strategy 1:** Critically examine personal and systemic biases, attitudes, beliefs, values and practices to increase student and staff understanding and appreciation of Indigenous worldviews, histories and perspectives.
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 - ☐ **Strategy 2:** Work in collaboration with Ministry of Children & Family Development to provide joint educational planning and support for children and youth in care that helps develop the child's personality, talents and mental and physical abilities to the fullest for current and future success.
 - ☐ **Strategy 3:** Engage and collaborate with families to encourage awareness of and engagement in physical literacy and mental health literacy that improves outcomes for students in classrooms and at home.
 - ☐ **Strategy 4:** Address the inequity of opportunity for all learners to maximize physical health and mental well-being.

Department Profile – Human Resources Services

12. **Data (FESL, Student Learning Survey, Participation Rates, etc.):**

Not directly applicable.

Human Resource Services Department

Budget FY 2022 - 2023

					<u>\$000</u>
STAFF:	12.7 FTE**				
	Exempt	7.0	Principal	1.0	Clerical 4.7
	Total Salaries and Benefits*				1,527

** Includes stipends and release time for Health and Safety*

*** Additional 1.3 FTE Clerical included in Classroom Enhancement Special Purpose for a total of 14 FTE*

EXPENSES:

Employee and Family Assistance / Return to Work Programs	151
Professional Development and Training	20
CUPE 947 Professional Development Fund	36
Contracted Services / Miscellaneous Services	12
Health and Safety	30
Membership Fees	11
Labour Relations	147
Recruitment - Advertising	16
Office supplies, photocopying, printing, cell phones, mileage	17
	<u><u>1,967</u></u>

Department Profile – Financial Services

1. Department (description of primary work of the group):

The main functions of Financial Services, which encompasses Financial Services, Accounts and Payroll, include administering nine payrolls and related employee benefit plans, cash management, accounts payable and receivable, district budget preparation, allocating staffing resources, supplies and services budgets to schools and departments, budget monitoring, preparing various financial reports for the district, and providing financial administration support and training to schools and departments. The department is centralized, meaning all accounting entries, budget transfers, cheque requisitions and employee reimbursement requests submitted by schools and departments are reviewed and processed by Financial Services.

Purchasing Services, which falls under the Secretary-Treasurer's office, is also included in this profile. Purchasing Services is responsible for all public fund procurement for the Greater Victoria School District. The role of the department is to manage the procurement process to ensure the continuity of supply, ethical business practices, easy and cost-effective access to goods and services for our customers and foster a competitive marketplace.

Financial Services:

- Oversees preparation of all financial reports for the district including Annual Audited Financial Statements, Statement of Financial Information (SOFI), Quarterly Government Reporting Entity Reports, Annual and Amended Annual Budget Submissions, Registered Charity Information Return, monthly Board and management reports, Periodic Provincial and Federal Government financial reports, capital reporting
- Allocates school staffing and supplies resources
- Monitors staffing budgets and approves employment transactions
- Financial systems and internal controls
- Budget preparation for entire district and performs various financial analysis
- Prepares costing of collective agreement bargaining proposals
- Issues Canada Revenue Agency T2200 forms and charitable donation income tax receipts
- Reviews all journal entries and budget transfers prepared by schools and departments

Accounts:

- Accounting operations, including accounts payable and receivable
- Financial training and support to schools and departments
- Reviews and prepares journal entry uploads for all purchasing card transactions into the accounting software for 600 cardholders in the district
- Reviews and processes district-wide vendor invoices and employee expense reimbursements
- Prepares and processes journal entry uploads for nonpublic deposits
- Prepares and process statutory remittances
- Banking administration, cash flow forecasting and investment management
- Asset and liability account reconciliations
- Insurance claims financial administration
- Prepares and issues Canada Revenue Agency T4A forms

Payroll:

- Oversees payroll and benefits administration for the entire district, which includes 9 Payrolls representing 7 employee groups
- Administration of Teachers' Pension Plan and Municipal Pension Plan
- Administration of WSBC payments to employees and quarterly reporting
- Prepares and issues Canada Revenue Agency T4 Forms and records of employment (ROEs)
- Prepares costing of collective agreement bargaining proposals related to payroll and benefits
- Develops documentation for payroll and benefit policies and procedures

Department Profile – Financial Services

- Prepares and submits Annual Pension Reports, Employment Data & Analysis Systems (EDAS) report and Statistics Canada Reports

Purchasing:

- Responsible for all public fund procurement for the district
- Management of the district quotation/tender/proposal process
- Contract administration and contract negotiations
- Administers purchasing card program
- Processes and expedites purchase orders
- Supplier development and certification
- Performs various market research
- Cooperative and group procurement initiatives
- Monitors and evaluates supplier and customer service
- Oversees mail services for Tolmie

2. Staff Name(s), Position(s), FTE & Affiliation:

Financial Services:

- 1.0 FTE Associate Secretary-Treasurer (Exempt)
- 1.0 FTE Director of Finance, Budgets & Financial Reporting (Exempt)
- 1.0 FTE Administrative Assistant II (CUPE 947)
- 1.0 FTE Assistant Accountant – Financial Management and Reporting (CUPE 947)
- 2.0 FTE Financial Accounting Assistants (CUPE 947)

Accounts:

- 1.0 FTE Manager, Accounting
- 2.0 FTE Accounts Clerks
- 3.0 FTE Reconciliation Accountants

Payroll and Benefits:

- 1.0 FTE Manager, Payroll and Benefits
- 1.0 FTE Assistant Accountant Payroll
- 4.0 FTE Payroll Specialists
- 2.0 Benefits Specialists

Purchasing Services:

- 1.0 FTE Administrative Assistant, Purchasing Services
- 2.0 Senior Buyers

3. Select as Applicable:

- ☐ Allied Specialists' Association (ASA)
- ☐ CUPE-382
- ☒ CUPE-947
- ☐ Counsellor
- ☐ Teacher
- ☐ P/VP
- ☒ Exempt
- ☐ Other

Department Profile – Financial Services

4. **Student FTE as per 1701 / Other Numbers of Students Supported / Served:**

Financial Services and Purchasing indirectly supports all students within the district

5. **Budget (Operating and/or Special Purpose Funds):**

See attached Financial Services and Purchasing Department budgets.

6. **Student / Family Support (description of work for students & families):**

- Provides support to schools for School Cash Online so that parents can pay for items online
- Issues scholarships and bursaries
- Provides guidance to PACs regarding fundraising and donations
- Provides administrative support for contracts and operations of schools, which are directly tied to students and families

7. **School Support (description of work for staff, P/VP, etc.)**

Financial Services supports schools as follows:

- Administers nine payrolls and related employee benefit plans
- Provides budget support and advice to Principals/Vice-Principals and administrative CUPE 947 staff
- Provides guidance to Principals/Vice-Principals around financial management issues at school/department and assistance reading financial reports
- Assists schools with calculation of staffing costs
- Prepares and distributes annual budget allocations
- Reviews all journal entries and budget transfers prepared at school and provides accounting support to administrative CUPE 947 staff
- Reviews and processes employee expense reimbursements
- Maintains and monitors balance of PVP Pro-D accounts
- Provides budget training to Principals/Vice-Principals
- Provides software and general accounting and budget training to CUPE 947 staff

Purchasing:

- Oversees administration of district purchasing card program
- Responsible for all public fund procurement for the entire district
- Responds to general purchasing inquiries, status of purchase orders

8. **District Support (cross-department, FESL, Ed Policy, Admin Mtgs., etc.):** The

Associate Secretary-Treasurer attends the following:

- District Leadership Team meetings
- Administrators' meetings
- CUPE 947 Labour Management meetings
- CUPE 947 Joint Job Evaluation Committee (JJEC)
- Operations Policy & Planning Meetings and Board Meetings

Financial Services works closely with Departments on their annual budgets, as well as providing regular guidance on budget and accounting related items

Accounts sends departments monthly financial reports to assist departments with monitoring their budgets

Financial Services works closely with Facilities services, preparing a department forecast monthly, assisting with capital expense monitoring

Department Profile – Financial Services

9. **Community & Interagency Partnerships:**

Financial Services and Purchasing are involved in the following organizations:

- Greater Victoria Joint Purchasing Group (GVJPG)
- BC Association for School Business Officials
- National Payroll Institute
- Chartered Professional Accountants

Financial Services and Purchasing have relationships with community organizations including:

- VCPAC and school PACs
- School Alumni and Music Parent Associations
- Municipalities
- Community sports associations
- Other provincial ministries
- South Island Partnership

10. **Ministry of Education and Child Care Directives:**

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/resource-management/school-district-financial-reporting>

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/resource-management/k-12-funding-and-allocation>

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/legislation-policy/public-schools/k-12-funding-general>

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/legislation-policy/public-schools/financial-planning-reporting>

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/legislation-policy/public-schools/operating-surplus>

<https://www2.gov.bc.ca/gov/content/education-training/k-12/administration/capital/programs>

Department Profile – Financial Services

11. Alignment with the District Strategic Plan: *

- ☒ **Goal 1:** Create an inclusive and culturally responsive learning environment that will support and improve all learners' personal and academic success.
 - ☐ **Strategy 1:** *Develop and support high quality learning opportunities through the implementation of curriculum in order to improve student achievement.*
 - ☐ **Strategy 2:** *Engage and collaborate with students, families and staff to provide an inclusive learning environment that will enhance and support student learning, identities and well-being.*
 - ☐ **Strategy 3:** *Address the inequity of outcomes for diverse learners in literacy, numeracy, engagement and completion rates.*
- ☒ **Goal 2:** Create a culturally responsive learning environment that will support Indigenous learners' personal and academic success.
 - ☐ **Strategy 1:** *Critically examine personal and systemic biases, attitudes, beliefs, values and practices to increase student and staff understanding and appreciation of Indigenous worldviews, histories and perspectives.*
 - ☐ **Strategy 2:** *Engage and collaborate with local Nations, Indigenous educators, Indigenous community leaders, Elders and families to enhance Indigenous student learning and well-being and identity.*
 - ☐ **Strategy 3:** *Address the inequity of outcomes for Indigenous learners in literacy, numeracy, attendance and graduation rates.*
- ☒ **Goal 3:** Create an inclusive and culturally responsive learning environment that will support all learners' physical and mental well-being.
 - ☐ **Strategy 1:** *Continue to provide professional learning opportunities to all staff in K-12 to further support implementation of social emotional learning, physical literacy and mental health literacy that improves outcomes for students and classrooms.*
 - ☐ **Strategy 2:** *Work in collaboration with Ministry of Children & Family Development to provide joint educational planning and support for children and youth in care that helps develop the child's personality, talents and mental and physical abilities to the fullest for current and future success.*
 - ☐ **Strategy 3:** *Engage and collaborate with families to encourage awareness of and engagement in physical literacy and mental health literacy that improves outcomes for students in classrooms and at home.*
 - ☐ **Strategy 4:** *Address the inequity of opportunity for all learners to maximize physical health and mental well-being.*

Department Profile – Financial Services

12. Data (FESL, Student Learning Survey, Participation Rates, etc.):

- Enrolment FTE and Headcount
- Staffing FTE and Headcount
- 1701 data collection
- EDAS Reporting
- Various provincial and federal financial reports

Financial Services Department

Budget FY 2022-2023

\$000

STAFF: 20.0 FTE

Exempt 4.0 Accounting & Finance 9.0 Payroll 7.0

Total Salaries and Benefits 1,702

EXPENSES:

Professional Development and Training 14

Contract Services / Miscellaneous Services 12
(Paystation, MOTUS, recruitment, annual corporate records fees)

Membership Fees 7

Office supplies, furniture and equipment, cell phones, mileage 23

1,758

Purchasing Services Department

Budget FY 2022-2023

\$000

STAFF: 3.0 FTE

Senior Buyers 2.0 Clerical 1.0

Total Salaries and Benefits 237

EXPENSES:

Professional Development and Training 5

Contract Services / Miscellaneous Services 9

Postage and Courier 17

Office supplies, photocopying, cell phones, mileage 7

275