Waterloo Region District School Board

Inspired Learners – Tomorrow's Leaders

SUBJECT: **2015-2016 BUDGET RECOMMENDATIONS**

ORIGINATOR: This report was prepared by Matthew Gerard, Superintendent of Business Services and Treasurer, Karen Newland, Controller of Financial Services, Wendy Jocques, Manager of Budget Services and Sharon Uttley, Manager of Accounting Services, in consultation with Executive Committee.

PURPOSE/STRATEGIC PLAN:
To seek approval of the budget for 2015-2016. Annually preparing a budget ensures financial resources are aligned to sustain quality public education and promote forward-thinking.

BACKGROUND:
As in prior years, the process for development of the 2015-16 budget for the Waterloo Region District School Board (Board) began early in the new calendar year (Appendix A). In order to project expenditures, budget centres were asked to assess their cost pressures and ongoing fixed costs for the upcoming year.

In addition, detailed enrolment projections were completed in preparation for the calculation of the Board's staffing and revenue projections. These projections can be found in Appendix B.

The Ministry of Education (Ministry) announced education funding through the Grants for Student Needs (GSN) for 2015-16 on March 26, 2015. The 2015-16 funding to school boards is projected to be relatively constant year-over-year while building efficiencies into the funding model. The most significant changes include:
- School Board Efficiencies and Modernization (SBEM) Strategy
- School Condition Improvement (SCI) Funding
- Collective bargaining
- Continued phase in measures
- Keeping up with costs
- More work to do together

School Board Efficiencies and Modernization (SBEM) Strategy
In 2014-15 the Ministry introduced the School Board Efficiencies and Modernization (SBEM) strategy to provide incentives and supports for boards to make more efficient use of school space. The current approach to managing school space, which diverts significant funding to support underutilized space, is fiscally unsustainable. In 2015-16, the Ministry will broaden the SBEM initiative with further measures to encourage the management of underutilized school space, while maintaining support for the schools that need it most, and measures to update and modernize the funding formula. These measures will result in changes to:
  1) Top-up funding and benchmarks,
  2) School Foundation Grant,
  3) Geographic Circumstances Grant, and
  4) Declining enrolment adjustment.

These changes (except for declining enrolment) will be phased in over 3 years.

School Condition Improvement (SCI)

In 2015-16 the funding will double the amount that was allocated to boards in 2014-15. Funding is intended to help boards address the identified backlog from the data collected to date through the Ministry's five-year Condition Assessment Program, which began in 2011. A further $500 million will be allocated to boards in 2016-17. The funding will now be allocated to boards in proportion to a board's total assessed renewal needs under the Condition Assessment Program. Beginning in 2015-16 boards are required to direct 80% of the SCI funding to key building components (eg, foundations, roofs, windows) and systems (eg. HVAC). The remaining 20% can be used to address locally identified needs.

Collective Bargaining

Most of the collective agreements in the education sector expired August 31, 2014. The existing terms and conditions of employment in expired collective agreements will continue into the 2015-16 school year, unless terms and conditions are specifically time limited in the current collective agreement. GSN funding for compensation and other labour costs in 2015-16 will reflect the current status under the statutory freeze. When negotiations result in new collective agreements, the Ministry will seek approval of the Lieutenant Governor in Council regarding any necessary amendments to the GSN.

Continued Phase In Measures

In 2015-16 the Ministry is continuing with the second year of the four year phase in for the School Board Administration and Governance Grant funding and The High Needs Amount (HNA) Allocation of the Special Education Grant. These changes will be fully implemented by 2017-18. The reduction in benefits benchmark funding of 0.167% will continue to be implemented.

Keeping Up With Costs

The Ministry is once again recognizing that specific costs are projected to increase and is increasing the Student Transportation Grant by 2% and increasing the cost benchmark on the non-staff portion of the School Operations Allocation by 2% and a further 7.3% on the electricity component of the School Operations Allocation benchmark.

More Work To Do Together

As the Ministry consults further on sector efficiencies, they will focus on streamlining reporting requirements where possible. The Ministry continues to work with the sector to ensure that funding targeted to the government's key priorities is used for its intended purpose. During the 2015-16 school year the Ministry will be conducting School Consolidation Experience Studies (SCES) to better understand stakeholder experiences with pupil accommodation pressures. While the pupil accommodation process can be challenging, the outcomes resulting from the decision are often beneficial. Boards are better able to focus their resources on the students they serve rather than underutilized space. The Ontario government has identified Community Hubs as a key priority for the province. An advisory group has been implemented and the group will work to develop a strategic framework to guide the development of an approach to enhance the use of community assets.

STATUS:

Building off the work that commenced as part of the 2013-14 system fiscal review, a thorough review was completed by departments and Financial Services to ensure spending trends are analyzed and adjustments made to base budget to reflect these trends. The budget presented aligns funding with expenditures. Despite increasing cost pressures, and changes to the GSN funding, the Board benefited from this initiative which ensured that the Board was well positioned fiscally to address further challenging issues. Therefore, the budget presented is balanced and provides funding for new initiatives to continue to move the Board forward and ensure student achievement and well-being for all students. This positions the Board in a stronger financial position as we begin the next phase of planning to ensure long term financial sustainability.

Having considered the Waterloo Region District School Board Strategic Plan and the desired outcomes of the Board Improvement Plan for Student Achievement (BIPSA), administration is confident that the 2015-16 budget is fiscally responsible, will allow staff to build on progress, and to make the necessary investments to optimize student learning and success. The budget that is presented to the Board is in compliance with grant regulations, provincial standards and legislation, and funding envelopes.

The three main components that determine the budget are enrolment, revenues (primarily grants) and expenditures.

Enrolment
The grant revenue the Waterloo Region District School Board receives is based primarily on enrolment. Elementary and secondary school enrolment is impacted by a multitude of factors that are taken into consideration when establishing enrolment projections. Secondary enrolment has decreased in the previous two fiscal years and is projected to increase slightly in 2015-16 and then decline again in 2016-17.

- Broad demographic trends
  - We continue to see smaller age cohorts move through the system, particularly in grades 7 and 8 and 9-12.
  - Our Secondary Attraction Rate, which is a measure of the growth in enrolment between grade 8 and grade 9, remains at roughly 106%; this is below the average experienced between 2009 and 2012.
  - The Region is only experiencing moderate growth, as measured by new housing development, with the majority of new dwelling units being apartments. The implication is that net migration into the Region is not supporting enrolment growth to the extent it did in prior years.
- Identified Risks
  - Ongoing labour negotiations may not be resolved by September 2015, creating the possibility for work-to-rule action or strikes. During the previous round of bargaining, when extra-curricular activities were cancelled, we saw an abnormal decrease in our secondary school enrolment compared to the budget forecast at the time

There is a modest increase in elementary enrolment.

The overall increase in enrolment accounts for a net grant increase of $2.8M in the 2015-16 budget.

Revenues
Although the 2015-16 GSN was announced on March 26, 2015, there may be further adjustments required at Revised Estimates due to potential adjustments resulting from on-going labour negotiations. Current provisions include the following:

Increased Funding
- School Foundation Grant
  - 2015-16 is the first year of a three year phase in of a new allocation model which provides funding for principals, vice-principals, office support staff, and administrative supplies.
  - Overall impact is a net increase in funding across the Province.
  - Eligible for principal at 150 Average Daily Enrolment (ADE) (previously 100ADE).
  - Secondary vice-principal funding is scaled 1 Full Time Equivalent per 500 ADE.
  - Net impact is an increase in funding of $84,103.
- Special Education Allocation
  - 2015-16 is the second year of a 4 year phase-in of the new HNA funding model and the Waterloo Region District School Board has seen an increase in funding for 2015-16 of $626,823.
- Transportation
  - The Student Transportation Grant will be increased by 2% in 2015-16 to recognize higher costs. In addition, funding adjustments due to fuel price changes will continue to be triggered by the escalation and de-escalation mechanism throughout the 2015-16 school year.
  - Impact is an increase in funding of $660,898.
- Operating and Renewal Cost Benchmarks
  - A portion of the savings from the elimination of the base top-up funding will be reinvested in the per-pupil operating and renewal cost benchmarks as part of the School Operations and School Renewal Grant
  - This will redirect funds from underutilized space to serve pupils in all schools across the province.
  - Ministry provided benchmark increases to assist boards in managing increases in commodity prices.
  - Impact is an increase in funding of $767,872.

- School Condition Improvement Grant (SCI)
  - In 2015-16, provincial SCI funding will increase to $500 million or double the amount that was allocated in 2014-15.
  - The funding is allocated in proportion to the Board's total assessed renewal needs under the Condition Assessment Program.
  - Renewal needs for buildings that will be assessed in 2015 have been estimated.
  - 80% of funding is directed to building components and systems, remaining 20% can be used to address locally identified needs.
  - Impact is an increase in funding of $3.7M.
- Investment Income
  - The overall cash-flow position of the Board has improved due to a large debenture received in March 2013 for $29.4M. In addition grants have increased over the last four years with the implementation of full day kindergarten and increased capital funding. The Board is able to maintain a positive cash position throughout most of the year.
  - Impact is an increase in revenue of $100,000.

Reduced Funding
- Base Top-Up Funding
  - Base top-up funding is being eliminated over 3 years starting in the 2015-16 school year and is part of the School Operations and School Renewal Grant
  - A portion of the savings from the elimination of the base top-up funding is being reinvested in the per-pupil operating and renewal cost benchmarks.
  - Impact is a decrease in funding of $749,152.
- School Board Administration and Governance Grant
  - Beginning in 2015-16, boards will be provided with the funding necessary to support the labour relations activities of their respective trustees' associations.
  - In 2015-16, the board will receive $43,316 for the purpose of offsetting the new annual Employer Bargaining Agent Fees charged to boards as a result of central negotiations.
  - In addition this is the second year of the four year phase in for the new funding calculation.
  - The net impact is a decrease of $40,491.
- Declining Enrolment Adjustment (DEA)
  - As part of the SBEM strategy in 2015-16 the DEA calculation is being adjusted to reduce some specific weighting factors in the first and second year component and the third year component of the calculation has been eliminated to encourage boards to adjust more quickly to declining enrolment
  - The impact is a decrease in the DEA grant of $795,243

Based on projected enrolment numbers, the Grants for Students Needs have been calculated as well as an estimate of other grants outside of the GSN and other revenues.

Appendix C attached includes an Analysis of Provincial Grants and Other Revenues.

Expenditures
Staffing has been determined and expenditures compiled based on enrolment numbers anticipated and recognizing Ministry primary class size caps, grades 4 to 8 average class size benchmarks, new Full Day Kindergarten classes, and secondary class size.

Our fiscal strategy continues to be one of stabilization through the matching of our expenses to the available revenue on an annual basis. When a change to funding is announced, any offsetting expense adjustment has been linked to the grant change whenever possible.

Details of the Expenditure Budget can be found in Appendix D.

The budget presented in this report is compliant with the balanced budget provisions of the Education Act.
This has been accomplished through the following process:

1. Budget centres have realigned their expenditures based on current collective agreements and expected expenditures resulting from those obligations. In addition, changes also reflect contracts, licenses or service agreements in place and changes required as a result of these obligations. This has been modified, where necessary, by the Ministry directives.

2. Specific expenditures have been reviewed, analyzed and adjusted where necessary. Major increases resulting in cost pressures this year include supply teacher costs ($2.3M), employee benefits ($1.6M), transportation related to special education ($0.5M) and fees and contracts ($0.2M). Appendix E provides a detailed listing of increases to the various fee and contracts the Board is contractually obligated to meet.

3. The most important consideration in the budget process is to sustain the Board's strategic direction and maintain the positive progress being made through school improvement plans and student learning. Staffing levels were reviewed and align with specific funding or class size targets.

4. As a continuation of the 2013-14 System Fiscal Review, programs and services were examined across the system in an attempt to preserve the Board's learning objectives and support the new strategic directions. A further $2.6M of reductions and realignments were made to adjust expenses to assist in attaining a balance between revenues and ongoing expenses within the system. The reductions will be discussed in more detail below.

   a. Retirement Gratuity Expense
      - The retirement gratuity expense is the retirement gratuity amount paid to those employees retiring throughout the year. The amount is projected by the School Boards' Co-Operative Inc. and provided to the Board through annual actuarial reports. The budgeted retirement gratuity expense for 2015-16 budget is $117,128 less than the budgeted amount in 2014-15 based on the actuarial report.
   b. Utilities
      - The annual spend on electricity for the system is projected be under budget in 2014-15. This is due to the excellent energy management plan implemented in Facility Services and the removal of portables that were not energy efficient. The 2015-16 electricity budget has been decreased by $817,090.
   c. Elementary School Monitors
      - During the development of the 2014-15 budget, $50,000 was added to the elementary school monitors budget to align with pressures identified by schools. However, during the 2014-15 fiscal year the budget allocation is not being fully utilized. Therefore, the 2015-16 budget has been decreased by $25,000 to realign budget to actual trending.
   d. Non-Occupational Salary and Benefits
      - This budget was created in 2011-12 to provide funding for employees' who were returning to work from a non-occupational related leave of absence and who require short term additional assistance to perform their duties. This account has not been utilized as salary and benefit costs associated with supporting the return are charged to the site location's budget and therefore, a budget reduction of $128,900 has been incorporated into the 2015-16 budget.
   e. Property and Liability Insurance
      - In spring of 2013 Financial Services reviewed the expenditures related to property and liability insurance. At that time a decision was made to increase the deductible from $10,000 per occurrence to $50,000 per occurrence. This resulted in premium savings of approximately $300,000 a year offset by increased costs being incurred by the Board due to the change in the deductible. Therefore, a net savings of $50,000 is being realized in the 2015-16 budget for property and liability insurance expenditures.
   f. Temporary Hourly Rated (THR) Support Staff
      - The budget for THR support staff has been realigned due to non-deployment of replacement staff. A reduction of $246,426 is reflected in the 2015-16 budget.

    g. Program Adjustments to Grant Amounts
- Program budgets funded through specific grants have been adjusted to agree to the approved grant allocation generated for 2015-16. This resulted in expenditures being reduced by $6,700.

    h. Interest Expense
- In reviewing the annual spend on interest expense there was an opportunity to realign the budget through a reduction of $40,954. This reflects the increased cash-flow experienced by the Board and lower interest expenses as the number of days the Board draws on the operating line of credit in a fiscal year has been greatly reduced.

    i. Retirement Gratuity re: Compliance
- Under the 2012 Memorandum of Understanding the Board realized a retirement gratuity liability that must be fully provided for within 12.8 years. During the 2014-15 budget the Board accelerated the amount being brought into compliance. As part of the 2015-16 budget it is recommended that the amount being brought into compliance within the year be reduced by $1,058,283. All things being equal at this rate the liability would be fully provided for by the end of 2019-20.

5. The critical endeavour in the budget setting process is to align contemplated initiatives with those system objectives and in particular with the changes in strategic direction envisioned by the Board. New initiatives in the amount of $2.1M have been included in the budget and will be funded out of prior year accumulated surplus on a one time only basis. A detailed listing of the new initiatives funded can be found in Appendix G.

6. It is estimated that the August 31, 2015 year end Unappropriated Accumulated Surplus – Available for Compliance will be between $21.0M and $23.5M.

Information regarding the 2015-16 budget is attached as follows:

Appendix A	Budget Preparation Instruction Memos
Appendix B	Enrolment Projections
Appendix C	Analysis of Provincial Grant Allocations and Other Revenues
Appendix D	2015-16 Budget Detail
Appendix E	2015-16 Budget - Summary of Changes to Fees and Contracts Budget
Appendix F	2015-16 Summary of Capital Budget
Appendix G	New Initiatives – Funded in 2015-16 Budget
Appendix H	New Initiatives – Funded via Base Budget Realignments
Appendix I	New Initiatives – Deferred to Future Budget Discussions

<u>Balanced Budget Compliance</u>
School boards are required to submit balanced budgets that require total expenses to be equal to or less than total revenue. However, an in-year deficit is permissible if there were prior surpluses represented in Accumulated Surplus on the Board's Statement of Financial Position. Ministry approval is required if the use of accumulated surplus is greater than 1% of the Board's operating revenue in order to ensure that this action "does not place the Board in undue financial risk" (Technical Paper, 2015-2016, Ministry of Education). The budget meets Ministry guidelines.

<u>Risks</u>
The budget has been developed using the most current information available. There are a number of risks that may impact the financial situation of the Board and will require monitoring. These include:
- On-going changes in enrolment
- Outstanding retirement gratuity liability and funding decline
- Expiring labour contracts
- Provincial environment and economics
- Changing Ministry directives

<u>Next Steps</u>
Stakeholders have been invited to "have their say" with respect to the 2015-16 Budget and Beyond by attending the budget delegation evening on Wednesday, June 10, 2015.

Further discussion related to the approval of the 2015-16 budget will occur on the following dates:
- Monday June 15, 2015
- Wednesday June 17, 2015
- Monday June 22, 2015
- Wednesday June 24, 2015 (budget confirmation)

The approved budget is to be submitted to the Ministry by June 30, 2015.

In order to ensure the future viability of the Board's financial status it has become increasingly important to monitor the existing and potential risks inherent in our operation. Many reductions and realignments have been made in response to the enrolment, expenditure and grant realities over the last few years.

As we move into the start of the 2015-16 school year it is important that the Long Term Fiscal Sustainability and Stability Task Force (known as Fiscal Task Force) meet and develop a plan for potential review areas with a goal of achieving sustainable savings that can be incorporated into the 2016-17 budget. The first meeting of the Fiscal Task Force for 2015-16 is currently planned to be held on September 8, 2015.

COMMUNICATIONS:
Following approval of the 2015-16 budget, the detailed estimates package will be completed and submitted to the Ministry by the June 30, 2015 deadline.

FINANCIAL IMPLICATIONS:
As outlined in the budget documentation.

RECOMMENDATION:
It is recommended:

That the Waterloo Region District School Board approve the budget as presented in the report "2015-2016 Budget Recommendations" report dated June 15, 2015 – with revenues of $690,321,082 and expenses of $681,456,959 with the difference of $8,864,123 attributed as follows:

Excess of Revenue over Expenditures	**$8,864,123**

LESS:

As required by Ministry of Education budget compliance regulations, this budget includes the following appropriations of accumulated surplus:

Increase/ (Decrease) in Unavailable for Compliance - Accumulated Surplus	
• **PSAB Adjustment for Retirement Gratuities**	**5,761,359**
• **PSAB Adjustment for Interest Accrual**	**141,256**
• **Revenues recognized for Land**	**5,172,499**
	$11,075,114

SUB-TOTAL – (Deficit) for Compliance Purposes before additional appropriations	**($2,210,991)**

LESS:

Increase/ (Decrease) in Internally Appropriated - Accumulated Surplus	
• **In-Year Committed Capital Projects**	
○ **Education Centre Maintenance**	**210,000**
○ **Amortization of committed capital projects**	**(330,626)**
• **New Initiatives (per Appendix F)**	**(2,066,320)**
• **To be offset in future years by Sinking Fund Interest earned**	**(24,045)**
	(2,210,991)

Difference	**$0**

[signature] **Director of Education**

WATERLOO REGION DISTRICT SCHOOL BOARD

Budget Preparation Instruction Memos

June 10, 2015

WATERLOO REGION DISTRICT SCHOOL BOARD

DATE: February 2, 2015

TO: Director of Education
            Executive Superintendents
            Superintendents
            Coordinators and Managers

RE: **<u>Preparation of the 2015/16 Budget</u>**

The 2015/16 budget process is now officially underway. This email includes instructions for completing your Departmental base budget package. Budget requests for New Initiatives will be submitted through a separate process. The instructions and form will be e-mailed to you under separate cover today.

<u>Introduction:</u>
Over the last several years the board's annual budget process has been affected by various financial constraints. The provincial deficit remains one of the key risks and the potential impact it poses on upcoming funding to the education sector.

Therefore, preparation of budgets for the upcoming school year will require close examination of spending patterns, in order to substantiate the level of funding being requested. Departmental budgets are <u>not</u> to reflect increases to expenses except in the case of annual contractual agreements (e.g. annual maintenance/service agreements). Also, a number of projects have been undertaken over the past year to achieve operational efficiencies and, therefore, any potential savings should be reflected as a reduction to the base budget.

It is important to review your existing budgets thoroughly and to <u>complete in full</u> all budget documentation within the <u>prescribed timeline</u>.

<u>Documents to be completed:</u>

Two budget working papers have been combined into <u>one excel worksheet</u> which is to be completed. The worksheet consists of three tabs:

1. Tab 1: Your departmental "<u>Budget Working Paper</u>" which is pre-loaded with your budget account numbers and your 2014-15 budgets for reference with sub-totals by economic classification (i.e. Salaries, Benefits, Supplies & Services etc) and
2. Tab 2: A "<u>Budget Rationale Form</u>".
3. Tab 3: A "Sample" Budget Rationale Form.

Your yearend 2013/14 departmental report @ Aug.31, 2014_Period15 has been included with your budget working papers.

<u>Guidelines for Completing your Budget Working Paper and Budget Rationale Form:</u>

1. **New Initiative Requests**: <u>Do not</u> include any new budget proposals for 2015/16. <u>Also plans to reinvest significant base-budget dollars for other uses are to be included in this process</u>. These requests will be submitted separately. <u>Note</u>: Only items that meet specific strategic directions identified for 2015/16 are to be prepared and approved by your Executive Superintendent.

2. Run a <u>current</u> budget report from BAS to review your spending year-to-date.

3. Salaries & Benefits: You are not required to enter any $ information for salaries and benefits on the Budget Working Paper. These calculations will be prepared centrally by Financial Services staff based on staff complement information.

    If applicable, a "2015/16 Staff Complement" report for your department has been included with your working papers. Please review carefully and note any changes in FTE in the Salaries & Benefits section of the "Budget Rationale Form" *AND* arrange to confirm your 2015/16 staff complement directly with Wendy Jocques, Manager of Budget Services (Ext 4351)

4. Using your 2014/15 budget as a base, review your current budget and spending patterns by looking at the following:

    - Identify items which are one-time events in 2014/15 or areas where expenses have traditionally been underspent when compared to budget over the last couple of years. Reduce your budget accordingly.

    - Review the terms and conditions of any mandatory, legislated or contractual agreements for known or projected changes and adjust your budget accordingly. (E.g. insurance, utilities, annual rentals, service and maintenance agreements).

    - Based on current spending patterns and using existing budget dollars, reallocate budgets as necessary between accounts. For example, if you foresee spending more in travel and less in supplies.

    - *New for 2015/16*: Identify areas where operational efficiencies have been achieved and reduce your budget accordingly to reflect projected savings.

    - Round all budget amounts to the nearest hundred dollars.

5. The "Budget Rationale Form" has been developed to provide a written explanation of each major expenditure area within your budget. (E.g. salaries & benefits, travel, supplies, fees & contracts, etc) and includes a section for "Potential Savings" at the end of the form.

    - Rationale for Adjustment to Base Budget:
      Explain the reasons for changes (+/-) made to your 2015/16 base budget reported in the Adjustment to Base column on the Detailed Budget Working Papers.
    - Fees & Contracts Category:
      The Fees & Contracts category includes two sections.
      - The first section is the standard rationale section
      - The second requires detailed information for each fees & contracts account including the names of contractors if known and the type of cost.

    - Area for Potential Savings:
      Since the potential for further expenditure reductions exists, we want to ensure that the operation of your department or program is not adversely affected by reductions to your critical areas. Therefore, we are asking that you identify areas within your newly developed budget base, where, in your opinion, further savings might be achieved should reductions be required.

Timelines:
Completed forms are to be returned by e-mail to Glenn McLelland, Budget Services, by **Wednesday, February 18, 2015**. If you have any difficulty completing or printing the budget files, please contact Glenn at Ext 4366.

Thank you for your co-operation.

Wendy Jocques, Manager of Budget Services

WATERLOO REGION DISTRICT SCHOOL BOARD

DATE: February 2, 2015

TO: Director of Education
Executive Superintendents
Superintendents
Coordinators and Managers

RE: <u>Preparation of the 2015/16 New Initiative Requests (#F-2015-NI)</u>

New budget proposals and significant base budget reinvestment plans are prepared using the New Initiative Form (#F-2015-NI).
Note:
Given the board's current financial constraints, the New Initiative process was postponed for 2014/15. Although the board's financial situation continues to face numerous risks for 2015/16, the key mandate of the budget process is to sustain the Board's strategic direction and to promote and positively impact student achievement and well-being. Therefore, through direction from Executive Council, new initiative requests to be identified are limited to and are to focus on specific strategic directions for 2015/16. These key targets include: *Technology for Student Learning & Achievement, Student Learning & Well-being, Staff Well-being & Wellness, and Communication/Engagement.* Requests that meet these criteria must be approved by your Executive Superintendent before submitting to Financial Services.

The New Initiative Form (#F-2015_NI) must be completed in full. The form includes a new template for completion which is a condensed version of a business case. *Forms will be returned for correction if not properly completed and must be submitted by the due date.*

<u>Instructions:</u>
The New Initiative Form is an excel spreadsheet which consists of several worksheets within the file.

- Tab 1 - "NI-Form": Provide details of your proposal in the text section at the top of the page. Check off whether this request is a "one-time request" or "on-going".

- ***Revised for 2015/16***: Tab 2 – "Business Summary": This section provides a detailed synopsis of the proposed plan including purpose, scope, timelines, financial & resource commitments, and confirmation of alignment to the board's strategic directions .

- Tab 3, 4, 5 & 6 Elementary, Secondary, Allocable & Summary Costs: Enter the projected costs and staff FTE in the appropriate "Panel" worksheet on the proper Ministry line and within the specific category (e.g. salaries, benefits, supplies, etc.). Once this data is entered, the amounts from the "Summary" file will automatically summarize to the bottom section on Tab 1.

<u>Timeline:</u>
Approved forms are to be submitted to Cindy Klooster, Budget Services, by <u>no later than Friday, February 27, 2015</u>. Please contact us if you require further assistance.

Thank you for your co-operation.

Wendy Jocques
Manager of Budget Services

WATERLOO REGION DISTRICT SCHOOL BOARD
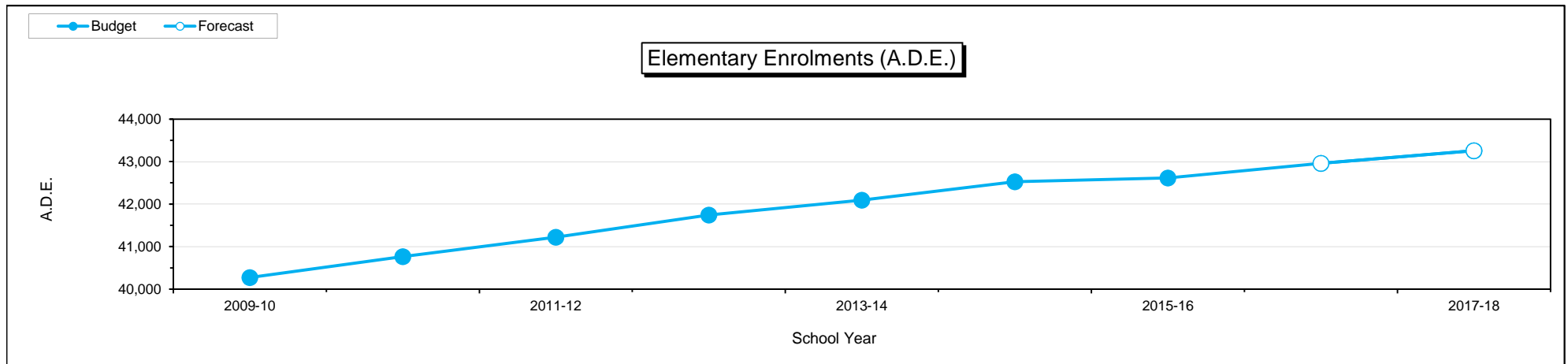
Enrolment Projections

June 10, 2015

Historical Change in Enrolment- Budget

ELEMENTARY SCHOOLS

| GRADE	2009-10 ADE (Budget)	2010-11 ADE (Budget)	2011-12 ADE (Budget)	2012-13 ADE (Budget)	2013-14 ADE (Budget)	2014-15 ADE (Budget)	2015-16 ADE (Budget)	2016-17 ADE (M-Y Forecast)	2017-18 ADE (M-Y Forecast)
Junior Kindergarten (JK)	3,594.50	3,791.00	3,873.00	3,756.00	3,908.00	3,981.00	4,021.82	-	-
Kindergarten (SK)	4,079.00	4,279.00	4,259.50	4,532.00	4,326.00	4,358.00	4,296.08	-	-
Grades 1 to 3	12,073.03	12,215.86	12,656.78	12,812.00	13,152.50	13,138.00	13,283.00	-	-
Grades 4 to 8	20,518.03	20,467.70	20,427.38	20,639.50	20,703.00	21,046.50	21,006.50	-	-
Visa	5.00	12.00	2.00	2.00	5.00	5.00	7.00	-	-
Total Elementary	40,269.56	40,765.56	41,218.66	41,741.50	42,094.50	42,528.50	42,614.40	42,960.72	43,256.72
Change (Budget to Budget)		496	453	523	353	434	86	346	296

NOTE: Beginning in 2014-15, JK and SK students receiving more than 210 minutes of instruction per day will be counted as 1.0 FTE. In the past, these students were counted as 0.5 FTE. In order to allow for comparison, historic information has been adjusted to reflect the change in 2014-15

Elementary Enrolments (A.D.E.)

SECONDARY SCHOOLS

GRADE	2009-10 ADE (Budget)	2010-11 ADE (Budget)	2011-12 ADE (Budget)	2012-13 ADE (Budget)	2013-14 ADE (Budget)	2014-15 ADE (Budget)	2015-16 ADE (Budget)	2016-17 ADE (M-Y Forecast)	2017-18 ADE (M-Y Forecast)
Grades 9 to 12 < 21 years	20,438.00	20,652.75	20,614.75	20,486.00	19,555.08	18,743.73	18,872.52	-	-
High Credit					235.38	46.03	47.74	-	-
Grades 9 to 12 >21 years	9.13	9.60	7.26	14.00	9.50	10.00	9.38	-	-
Other Pupils	30.00	38.00	36.00	42.00	60.00	63.24	60.74	-	-
Total Secondary	20,477.13	20,700.35	20,658.01	20,542.00	19,859.96	18,863.00	18,990.38	18,660.57	18,706.99
Change (Budget to Budget)		223	(42)	(116)	(682)	(997)	127	(330)	46

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
TOTAL ADE	*60,747*	*61,466*	*61,877*	*62,284*	*61,954*	*61,392*	*61,605*	*61,621*	*61,964*
Change from Previous Year (Budget)		*719*	*411*	*407*	*(329)*	*(563)*	*213*	*17*	*342*

Secondary Enrolments (A.D.E.)
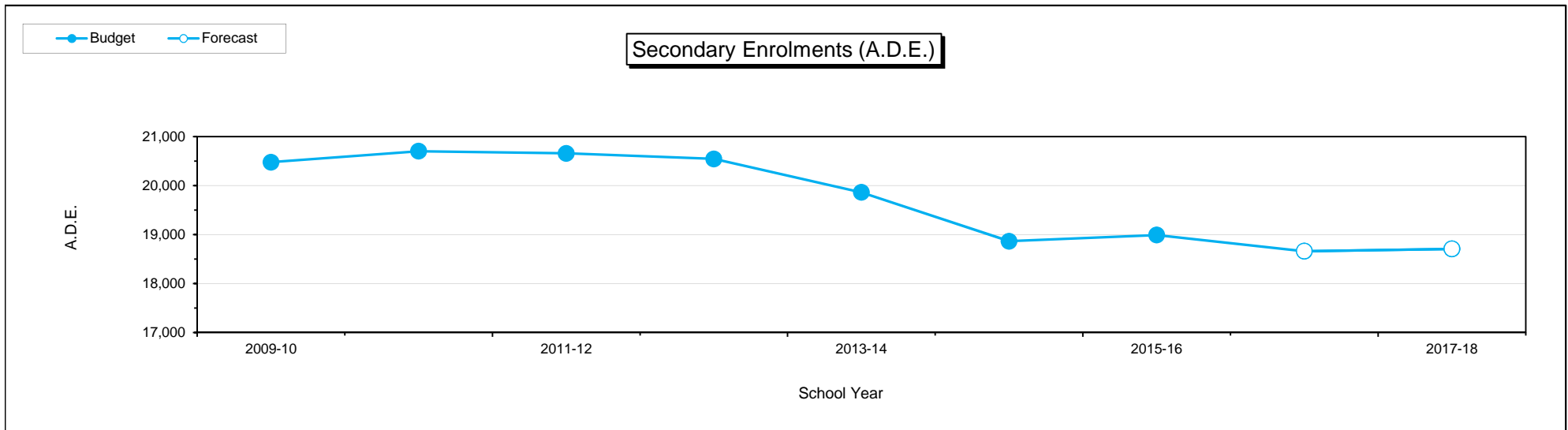
WATERLOO REGION DISTRICT SCHOOL BOARD

Analysis of Provincial Grant Allocations and Other Revenues

June 10, 2015

Waterloo Region District School Board

2015/16 Budget

Grants for Student Needs

Grants for Student Needs (GSN)	GRANT ALLOCATIONS		
	2014/15 Estimates	2015/16 Estimates	Difference
	$	$	$
Pupil Foundation Allocation	327,499,515	328,264,240	764,725
School Foundation Amount	40,600,434	40,684,537	84,103
Special Education Allocation	81,201,730	81,828,553	626,823
French Language Allocation	7,724,205	8,010,544	286,339
English as a Second Lanaguage Allocation	5,466,252	5,617,431	151,179
Learning Opportunities	6,841,337	6,814,052	(27,285)
Adult Education, Summer School	1,981,924	1,878,043	(103,881)
High Credit	153,786	159,261	5,475
Cost Adjustment and Teacher Qualification and Experience Allocation	49,059,006	50,555,958	1,496,952
Designated Early Childhood Educator Qualifications and Experience Allocation	3,352,888	3,550,386	197,498
New Teacher Induction Program	436,247	393,413	(42,834)
Public Sector Compensation Restraint related to non-unionized staff	(129,030)	(129,030)	0
Transportation	15,189,539	15,850,437	660,898
Administration & Governance	16,026,524	16,001,161	(25,363)
Trustees' Association Fee for labour relations activities	0	43,316	43,316
School Operations	56,592,678	57,234,604	641,926
Community Use of Schools	772,475	784,719	12,244
Temporary Accommodation	1,981,168	1,678,668	(302,500)
First Nation, Metis and Inuit	663,352	772,190	108,838
Safe Schools	1,231,647	1,231,603	(44)
Declining Enrolment	1,002,886	207,643	(795,243)
School Renewal	8,682,614	8,671,956	(10,658)
School Condition Improvement Grant - Capital	5,731,089	0	(5,731,089)
Other Capital	104,872	104,872	0
Debt Charges - Interest Portion	8,544,953	8,209,699	(335,254)
Sub-total GSN	**640,712,091**	**638,418,256**	**(2,293,835)**

Less: Amount transferred to DCC	**(17,196,047)**	**(12,417,300)**	
Day School Fees - Ont. Residents	**(15,000)**	**(10,000)**	
Total Grants for Student Needs	**623,501,044**	**625,990,956**	**2,489,912**

Waterloo Region District School Board

2015/16 Budget

Year over Year Grant for Student Needs Change

	Change Increase/(Decrease)
Net Enrolment Impact (Net Increase 212.69 Average Daily Enrolment)	2,757,747
Benchmark Increases	3,011,333
Benchmark Decreases	(558,272)
Changes to Funding Model Calculations:	
School Foundation	(14,456)
Special Education - High Needs Amount Funding Model Change	263,191
Board Administration & Governance Change in Funding Model	(73,291)
Declining Enrolment - Funding Model Change	(795,243)
School Operations	(492,853)
School Condition Improvement - Funding moved out of GSN	(5,731,089)
Trustees Association Fee for labour relations activities	43,316
Funding Decreases (New Teacher Induction Program, Temporary Accommodation, Debt Interest Charges)	(704,215)
Year over Year Change in Grant for Student Needs	**(2,293,833)**

Waterloo Region District School Board

2015/16 Budget

Educational Program Other (EPO) Grants

PROGRAM	2014/15 Estimates	2015/16 Estimates	Difference
Gr. 7-12 Differentiated Instruction	47,398	-	(47,398)
Building Innovative Practice	113,305	118,213	4,908
Autism Supports & Training	92,754	92,972	218
Community Use - Outreach Co-ordinator	128,000	128,000	-
E-Learning	105,000	105,000	-
Library Initiative: Library Staff	218,165	214,835	(3,330)
Math & Literacy: Professional Learning	47,398	-	(47,398)
Ontario Focused Intervention Partnership (OFIP) Schools in the Middle	537,100	523,700	(13,400)
Ontario Focused Intervention Partnership (OFIP) Student Work Study	240,000	240,000	-
Official Languages in Education Program: French as a Second Language	265,165	186,690	(78,475)
Collaborative Inquiry for Learning - Mathematics	135,000	135,000	-
Technology and Learning Fund		898,757	898,757
Schools Helping Schools - Schools in the Middle	25,000	25,000	-
Student Success & Cross Panel Teams	64,659	44,141	(20,518)
Student Success - Mathematics Instruction	47,398	-	(47,398)
Student Success - Instructional Impact	47,398	-	(47,398)
Community Use - Priority Schools	102,000	102,000	-
Early Years Leads Program	177,070	180,790	3,720
Outdoor Education	457,200	473,336	16,136
Managaing Information for Student Achievement (MISA) Local Capacity	55,897	56,016	119
Specialist High Skills Major	104,032	-	(104,032)
Tutors in the Classroom	30,000	30,000	-
Ontario Youth Apprenticeship Program (OYAP)	200,730	265,166	64,436
Literacy & Basic Skills	300,208	300,908	700
Safe, Caring Schools	127,079	-	(127,079)
Well Being: Safe Accepting and Healthy Schools and Mental Health		165,827	165,827
Board Mental Health Strategies	31,102	-	(31,102)
Learning for all K-12 Regional Projects	22,658	22,672	14
Student Success: Building Capacity for Effective and Differentiated Learning		189,563	189,563
Total Other Provincial Grants	**3,721,716**	**4,498,586**	**776,870**

Add: Amount transferred from Deferred- Library Investment   99,783   (99,783)

| **Total Educational Program Other Grants** | **3,821,499** | **4,498,586** | **677,087** |

Waterloo Region District School Board

2015/16 Budget

Other Revenue

	2014/15 Estimates	2015/16 Estimates	Difference
Investment Income	102,975	202,975	100,000
Fees (Ontario Residents, Foreign Students)	1,170,384	1,195,800	25,416
Rental Revenue	1,270,400	1,457,800	187,400
Amounts from Deferred Revenue - Education Development Charges	3,685,959	5,761,966	2,076,007
Fees for Extended Day Care - Early Learning Program	4,424,400	5,115,500	691,100
Other (insurance proceeds, recoverable)	1,127,018	1,453,451	326,433
Total Other Revenue	**11,781,136**	**15,187,492**	**3,406,356**

Waterloo District School Board

2015-2016 Budget

Comparison of Prior Year Allocations

Grants for Student Needs	2013/14 Actual $	2014/15 Estimates $	2014/15 Revised Est. $	2015/16 Estimates $
Pupil Foundation Allocation-Elementary	185,301,882	219,892,511	219,013,320	220,070,725
Pupil Foundation Allocation-Secondary	110,129,597	107,607,004	108,078,911	108,193,515
School Foundation Amount	39,198,932	40,600,434	40,610,539	40,684,537
Special Education Allocation	73,096,009	81,201,730	81,099,886	81,828,553
French Language Allocation	7,576,706	7,724,205	7,902,013	8,010,544
English as a Second Language Allocation	5,457,223	5,466,252	5,570,759	5,617,431
Learning Opportunities	6,705,323	6,841,337	6,839,396	6,814,052
Adult Education, Summer School	1,868,778	1,981,924	1,981,122	1,878,043
High Credit	392,753	153,786	241,320	159,261
Cost Adjustment and Teacher Qualification and Experience Allocation	44,394,771	49,059,006	48,404,923	50,555,958
Designated Early Childhood Educator Qualifications and Experience Allocation		3,352,888	2,905,834	3,550,386
New Teacher Induction Program Allocation	432,821	436,247	396,474	393,413
Public Secor Compensation Restraint related to non-unionized staff	(129,030)	(129,030)	(129,030)	(129,030)
Transportation	15,222,196	15,189,539	15,560,358	15,850,437
Administration & Governance	15,210,275	16,026,524	16,009,795	16,001,161
Trustees' Association Fee for labour relations activities				43,316
School Operations	53,790,445	56,592,678	56,639,094	57,234,604
Community Use of Schools	774,396	772,475	772,475	784,719
Temporary accomodation	1,971,196	1,981,168	1,981,168	1,678,668
First Nation, Metis and Inuit	903,909	663,352	762,944	772,190
Safe Schools	1,177,223	1,231,647	1,230,731	1,231,603
Declining Enrolment	863,197	1,002,886	1,242,320	207,643
School Renewal	8,414,790	8,682,614	8,688,760	8,671,956
School Condition Improvement Grant - Capital	3,394,804	5,731,089	5,731,089	0
Other Capital	104,872	104,872	104,872	104,872
Capital Debt Interest Portion	9,006,567	8,544,953	8,568,164	8,209,699
Retrofitting school space for child care	1,048,100			
Capital Grant for Land	370,000			
Labour-related enhancements	2,325,236			
	589,002,971	**640,712,091**	**640,207,237**	**638,418,256**

Enrolments - (ADE)

	2013/14	2014/15	2014/15	2015/16
Grades JK - 3	17,249.35	21,477.00	21,372.00	21,600.90
Grades 4 - 8	20,741.85	21,046.50	20,992.50	21,006.50
Total Elementary	37,991.20	42,523.50	42,364.50	42,607.40
Secondary	19,392.94	18,743.73	18,825.93	18,872.52
Total ADE	57,384.14	61,267.23	61,190.43	61,479.92

Note: 2014-15 Grades JK-3 enrolment numbers include Junior Kindergarten and Kindergarten students at 1.0 FTE, previous years numbers are recorded at 0.5 FTE.

WATERLOO REGION DISTRICT SCHOOL BOARD

2015-16 Budget Detail

June 10, 2015

WATERLOO REGION DISTRICT SCHOOL BOARD
2015/2016 BUDGET
REVENUE & EXPENSE SUMMARY

| | | Expressed in $ | | |
	2014/2015 Budget	2015/2016 Budget	Budget Variance	% Change
REVENUE CATEGORIES				
A. Provincial Grant Allocation	626,244,400	626,912,447	668,047	0.11%
B. Provincial Grants - Other	3,821,499	4,498,586	677,087	17.72%
C. School Generated Funds	12,000,000	14,000,000	2,000,000	16.67%
D. Investment Income	102,975	202,975	100,000	97.11%
E. Other Fees & Revenues	11,678,161	14,984,517	3,306,356	28.31%
F. Amortization of Deferred Capital Contributions	27,814,838	29,722,557	1,907,719	6.86%
Total Revenues	**681,661,873**	**690,321,082**	**8,659,209**	**1.27%**
EXPENSE CATEGORIES				
A. Instruction - Classroom	483,045,580	489,105,542	6,059,962	1.25%
B. Instruction - Administration	47,441,034	47,897,791	456,757	0.96%
C. Administration & Governance	14,647,368	15,059,282	411,914	2.81%
D. School Operations	56,987,362	56,882,327	-105,035	-0.18%
E. Continuing Education	2,386,073	2,285,014	-101,059	-4.24%
F. Transportation	15,124,771	15,655,128	530,357	3.51%
G. Pupil Accommodation (Operating)	34,031,201	35,291,503	1,260,302	3.70%
H. Other	16,581,272	19,280,372	2,699,100	16.28%
Total Expenses	**670,244,661**	**681,456,959**	**11,212,298**	**1.67%**
PSAB Annual Surplus/(Deficit) before transfers	**11,417,212**	**8,864,123**		
Less: Externally Appropriated Surplus	-9,945,698	-11,075,114		
Plus/Less: Internally Appropriated Surplus	-571,514	144,671		
Plus/Less: Amounts from Accumulated Surplus	-900,000	2,066,320		
Net Budget Balance	**0**	**0**		

Note:
2014/15 budget re-aligned to correspond to 2015/16 Ministry reporting changes.

June 10, 2015

WATERLOO REGION DISTRICT SCHOOL BOARD
2015/2016 BUDGET
EXPENSE FUNCTIONS

		Expressed in $		
		2014/2015 Budget	2015/2016 Budget	Budget Variance	% Change
A.	**INSTRUCTION: CLASSROOM**				
	Salaries & Benefits	458,702,325	463,607,743	4,905,418	1.07%
	Supplies & Services	18,053,816	19,754,224	1,700,408	9.42%
	Contracts for Services	4,071,845	4,262,762	190,917	4.69%
	Amortization Expense	6,023,794	5,858,413	-165,381	-2.75%
	Less Minor Tangible Capital Assets	-3,806,200	-4,377,600	-571,400	15.01%
	Total	483,045,580	489,105,542	6,059,962	1.25%
B.	**INSTRUCTION: ADMINISTRATION**				
	Salaries & Benefits	45,767,273	46,266,844	499,571	1.09%
	Supplies & Services	2,045,861	1,712,047	-333,814	-16.32%
	Contracts for Services	201,000	182,500	-18,500	-9.20%
	Less Minor Tangible Capital Assets	-573,100	-263,600	309,500	-54.00%
	Total	47,441,034	47,897,791	456,757	0.96%
C.	**ADMINISTRATION & GOVERNANCE**				
	Salaries & Benefits	10,665,965	10,859,173	193,208	1.81%
	Supplies & Services	1,535,732	2,347,718	811,986	52.87%
	Utilities	397,800	397,800	0	0.00%
	Contracts for Service	1,533,362	1,679,347	145,985	9.52%
	Other	247,975	168,571	-79,404	-32.02%
	Capital - Ed. Centre Building Repairs	1,110,000	210,000	-900,000	-81.08%
	Amortization Expense	436,534	550,073	113,539	26.01%
	Less Tangible Capital Assets-Building	-1,110,000	-210,000	900,000	-81.08%
	Less Minor Tangible Capital Assets	-170,000	-943,400	-773,400	454.94%
	Total	14,647,368	15,059,282	411,914	2.81%
D.	**SCHOOL OPERATIONS**				
	Salaries & Benefits	34,148,183	34,560,989	412,806	1.21%
	Supplies & Services	5,402,280	5,826,687	424,407	7.86%
	Utilities	13,023,490	12,206,400	-817,090	-6.27%
	Contracts for Service	4,430,949	4,450,220	19,271	0.43%
	Amortization Expense	133,460	116,731	-16,729	-12.53%
	Less Minor Tangible Capital Assets	-151,000	-278,700	-127,700	84.57%
	Total	56,987,362	56,882,327	-105,035	-0.18%
E.	**CONTINUING EDUCATION**				
	Salaries & Benefits	2,236,073	2,133,314	-102,759	-4.60%
	Supplies & Services	85,500	81,500	-4,000	-4.68%
	Contracts for Service	64,500	70,200	5,700	8.84%
	Total	2,386,073	2,285,014	-101,059	-4.24%
F.	**TRANSPORTATION**				
	Salaries & Benefits	589,042	614,131	25,089	4.26%
	Supplies & Services	128,645	139,402	10,757	8.36%
	Contracts for Service	14,405,825	14,900,336	494,511	3.43%
	Amortization Expense	1,259	1,259	0	0.00%
	Total	15,124,771	15,655,128	530,357	3.51%
G.	**PUPIL ACCOMMODATION (OPERATING)**				
	School Renewal	2,117,956	2,117,956	0	0.00%
	Instructional Facility Rentals	2,001,355	1,730,749	-270,606	-13.52%
	Debt Charges - Interest	8,330,662	7,859,095	-471,567	-5.66%
	Amortization Expense	21,581,228	23,583,703	2,002,475	9.28%
	Total	34,031,201	35,291,503	1,260,302	3.70%
H.	**OTHER**				
	School Generated Funds	12,000,000	14,000,000	2,000,000	16.67%
	Non-Operating: 55 School Board Trust & FDK - Extended Day & Recoverable Salaries	4,581,272	5,280,372	699,100	15.26%
	Total	16,581,272	19,280,372	2,699,100	16.28%
	TOTAL EXPENSE BUDGET	**670,244,661**	**681,456,959**	**11,212,298**	**1.67%**

June 10, 2015

WATERLOO REGION DISTRICT SCHOOL BOARD

2015-16 Budget – Summary of Changes to Fees & Contracts

June 10, 2015

2015/16 BUDGET

2015/16 Adjustments to Base Budget: Re: Changes to Fees & Contracts

Departments	_Description_	_Totals_
a. _Facility Services_	*Includes contracts for the following: grounds maintenance, waste management, software license renewal for the computerized maintenance/mechanical software system (CMMS), vehicle insurance, facility rentals	31,000
b. _Planning Services_	*Includes software licenses to support the School Planning Software system related to property assessment, socio/economic and land registration data	15,000
c. _Central Services (Education Centre)_	*Includes contracts for the following: audit fees, telecommunications, laserfiche management	-9,000
d. _Human Resources_	*Includes contracts for the following: security & fire monitoring, health & wellness medical assessments, pre-screening testing, medical equipment performance maintenance, Human Resources software license renewals	33,700
e. _Information Technology Services_	*Includes maintenance & software license contracts for the following: software development & support, network infrastructure & data servers, desktop & technical services	81,500
Grand Total		**152,200**

WATERLOO REGION DISTRICT SCHOOL BOARD

2015-16 Summary of Capital Budget

June 10, 2015

Waterloo Region District School Board
2015-16 Summary of Capital Budget

Funding Source	2014-15 Budget	2015-16 Budget	% Change
New Schools and Additions	10,460,221	21,097,080	101.7%
Commited Capital Projects	1,110,000	1,209,327	8.9%
School Condition Improvement	5,731,089	9,354,220	63.2%
Full Day Kindergarten	3,239,526	3,212,846	-0.8%
School Renewal	6,564,658	6,554,000	-0.2%
Education Development Charges (EDC)	6,700,000	9,207,666	37.4%
Proceeds of Disposition (POD)	6,834,212	604,686	-91.2%
Temporary Accomodation	-	-	0.0%
Child Care Retrofit	200,000	-	100.0%
Minor Tangible Capital Assets	4,700,300	5,863,300	24.7%
Total Capital by Funding Source	45,540,006	57,103,125	25.4%

Expenditure	2014-15 Budget	2015-16 Budget	% Change
Buildings (new, additions, & renewal)	32,519,706	40,932,159	25.9%
Land	6,700,000	9,207,666	37.4%
Land Improvements	-	400,000	100.0%
Portable Structures	-	-	0.0%
Moveable Assets	6,320,300	6,563,300	3.8%
Total Capital by Funding Source	45,540,006	57,103,125	25.4%

Waterloo Region District School Board
2015-16 Summary of Capital Budget

New Capital Priorities	2015-2016 Projects	2014-2015 Completions	Land Purchases
New Vista Hills Public School ($7.5M)	School Renewal Projects ($6.6M)	New Westmount Public School ($1.3M)	Land Acquisitions ($9.2M)
New Groh Public School ($7.1M)	School Condition Improvement ($9.3M)	FDK Projects Various Sites	
New Riverside Public School ($6.7M)		Manchester Addition	**2015-2016 Minor Tangible Capital Assets**
New Chicopee Hills Public School ($3.3M)			Vehicle and Equipment ($6.1M)

WATERLOO REGION DISTRICT SCHOOL BOARD

New Initiatives – Funded in 2015-16 Budget

June 10, 2015

2015/16 NEW INITIATIVE REQUESTS

REPORT @ June 1, 2015

Ref. #	Details	2015-16 Original Request Amount	2015-16 FTE
A.	**PROPOSED PRIORITY REQUESTS TO BE INCLUDED IN THE BASE BUDGET**		
A1.	**Start-Up Resources for New Schools Opening September 1, 2016:** Staffing and supplies will provide supports for Groh Drive and Vista Hills. Technology resources will support Groh Drive, Vista Hills and Riverside (Elmira).	948,200	1.68
A4.	**Replacement of the financial accounting (BAS) software (K212 Financials):** The supports include additional compensation of extra hours worked & temporary help to back-fill during the pilot testing period. Professional development funding is required for staff training and for developing training materials and tools for system users.	75,000	
A5.	**Purchase/replacement of sixteen autoscrubbers:** Purchase of autoscrubbers for schools that do not have an autoscrubber or replacement cycle of autoscrubbers that are 20 plus years old.	128,000	
A9.	**Implement Web based attendance tracking:** Convert the paper based attendance system to a web based online system using computers by the end of 2015-16**.**	690,000	
A18.	**Chemical safety audits of the Visual Arts departments in secondary schools:**	27,120	
A21.	**Dreambox licenses for grade 1 and 2 students:**	198,000	
	GRAND TOTAL	**2,066,320**	**1.68**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**

a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address._

> When building a new school, the Ministry of Education provides funding for the capital-related expenditures, such as the building and first time equiping costs.
> However, no specific funding is provided for administrative office and classroom supplies nor computer technology. Traditionally, the need for new school start-up supplies has been requested in the past through the New Initiative process, covered from the accumulated surplus fund.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. _Technology for Student Learning & Achievement_

2. _Student Learning & Well-being_

3. _Staff Well-being & Wellness_

4. _Communications/Engagement_

a. _Identify the appropriate strategic category for this request:_

> Technology for Student Learning & Achievement
> Student Learning & Well-being

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized._

> Start-up funds for supplies and computer equipment are required for the opening of the new school in order for student learning to take place.
> This is a one-time request since on-going school office and administrative supplies will be provided for through the schools' designated operating budgets once the school opens.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above._

> This request provides the start-up resources required for student learning and achievement to take place in the classroom and includes the following:
> -.42 FTE principals & .42 FTE secretary for Groh Drive and Vista Hills to be hired March, 2016.
> - start-up administrative office and classroom supplies for Groh Drive and Vista Hills
> - start-up computer technology for Groh Drive ($150k), Vista Hills ($150k) & Riverside (E) ($75K)

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> This request will allow resources to be in place when the school officially opens so that student learning can take place immediately.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   This is a one-time request. The schools' designated operating budgets will provide the funds necessary for on-going resources.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> **_Note:_**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $: | $948,200

Types of Costs/Resources: | **Principal & secretary, office & classroom supplies, computer technology**

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*
a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> By then end of 2015/2016, the current accounting system will reach end of life and be replaced by a new ECNO supported web-based product. Considerable set up and configuration above and beyond daily duties will be required by Finance subject matter experts. Backfill, overtime, and training resources will be required to implement and support the new product in summer 2016.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*
New Initiative requests for 2015/16 are focused solely on the following strategic directions:
1. Technology for Student Learning & Achievement
2. Student Learning & Well-being
3. Staff Well-being & Wellness
4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> 4. Communications/Engagement

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> The primary goal is to ensure proper resources are available to successfully implement a product redesign of the Board's accounting software. This is a large-scale and required update and the success of implementation will depend on the availability of Finance subject matter experts. The new product will provide tools to improve system interaction with Financial Services and improve efficiencies within the department.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> BAS (to be K212 Financials) is the primary communication tool for schools and departments to provide, process, and retrieve accounting, purchasing, and budget information. The modernizaton of this tool will provide more effective means of sharing information. The backfill, overtime, and training resources will allow staff to better support users in the system during the initial implementation.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> The goal of the initiative is to support the successful implementation of the new accounting system. Success will be measured by the ability to meet the target timelines and the ability of Finance, Ed Centre and school staff to use all system functions as required. Failure to be prepared will put the Board in risk as there is no vendor support for the current system after Sept 2016.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > No

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:
Projected Budget Commitment $: | **$75,000**

Types of Costs/Resources: | **Salaries**

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **Purpose for the request:**

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> Replacement cycle of aged equipment.

2. **Key Focus for the 2015/16 Budget for "New Initiative" requests:**

   New Initiative requests for 2015/16 are focused solely on the following strategic directions:

   1. Technology for Student Learning & Achievement

   2. Student Learning & Well-being

   3. Staff Well-being & Wellness

   4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> Staff well-being and wellness.

b. **Goal/Outcome:**

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> Improved reliability of equipment, efficiency of staff cleaning operations and ergonomics .

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> Staff wll being and wellness.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Assess frequency of equipment breakdowns (anticipated to be fewer).

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**

Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)

Provide details.

> It is anticipated that this investment will provide for a healthy fleet of equipment for the next 3 to 5 years before another reinvestment may be required.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $: | $8,000.00 X 16 = 128,000

Types of Costs/Resources: | F & E

Source of Funding: | 2015/16 New Initiative request

2016/17 budget year:

Projected Budget Commitment $: | nil

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:

Projected Budget Commitment $: | nil

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:

Projected Budget Commitment $: | nil

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:	**$130,000 to be assessed in 2018/19 for 18/20 budget year**
Types of Costs/Resources:	**F & E**
Source of Funding:	**New Initiative**

2:19 PM 25/02/2015 NewInitiative_201516 Final.xlsx \ Business Summary

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**

a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/_
   problem that this initiative will address.

> Web Attendance
> A business driver for taking attendance requires that student attendance taking is completed using a computer. The current paper based process will no longer be available to us as of September 2016.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**

   New Initiative requests for 2015/16 are focused solely on the following strategic directions:

   1. Technology for Student Learning & Achievement

   2. Student Learning & Well-being

   3. Staff Well-being & Wellness

   4. Communications/Engagement

a. _Identify the appropriate strategic category for this request:_

> 1. Technology for Student Learning & Achievement
> 2. Student Learning & Well-being
> 3. Staff Well-being & Wellness
> 4. Communications/Engagement

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative_
      and the benefits (e.g. potential savings, area of improvement) that will be realized.

> Short term operational goals - convert paper based attendance to a web based online system using computers by the end of the 2015/2016 school year. Expectations are that attendance taking will be streamlined and simply take less time. Expected time saving for office staff of 35 to 40 minutes per day. A key benefit for elementary safe arrival.
> Long term - savings of just over $236,000 per year from base budget paper based process.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and_
      directions, noted above.

> This project aligns with all four areas. The computers can be used for student learning and achievement. Attendance taking is 3 to 5 minutes per day. Student learning and well being using computers for learning and teaching. All teaching staff are advantaged by the new process for taking attendance (less time and timely up to date attendance results.) Office staff have recorded an average time savings of 36 minutes per day. Electronic attendance is quickly communicated to

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> This is a business transition that is required and driven by our vendor partner who no longer supports paper based attendance. The yearly savings over the current paper based process is $236,000. This will offset the ongoing cost of replacing these school based devices.
> Based on feedback from our initial 14 school pilot we can expect to achieve 36 minutes of time savings for each office manager per school per day.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   Completion of this new initiative will occur in the 2015/2016 school year. Ongoing savings to pay for the projects constant renewal will occur starting in the 2016/2017 school year

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
   phase-in periods in the section below.

   Note:
   Under "Source of Funding" category, examples would include: New Initiative request, base budget
   savings from other budget areas, other sources-specify.

2015/16 budget year:

Projected Budget Commitment $:	$690,000
Types of Costs/Resources:	**First year capital costs**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	$230,000
Types of Costs/Resources:	**Replacement costs for computers is added to the existing CATC hardware line**
Source of Funding:	**$236,613 savings from base budget (no scanners and no specialty paper)**

2017/18 budget year:

Projected Budget Commitment $:	$230,000
Types of Costs/Resources:	**Replacement costs for computers is added to the existing CATC hardware line**
Source of Funding:	**$236,613 savings from base budget (no scanners and no specialty paper)**

2018/19 budget year:

Projected Budget Commitment $:	$230,000
Types of Costs/Resources:	**Replacement costs for computers is added to the existing CATC hardware line**
Source of Funding:	**$236,613 savings from base budget (no scanners and no specialty paper)**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $230,000

Types of Costs/Resources: | **Replacement costs for computers is added to to the existing CATC line**

Source of Funding: | **$236,613 savings from base budget**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*
   a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

   > Visual Arts has a number of high-risk processes that involve the storage/use of chemicals and processes that have safety implications to staff and students (i.e. wet chemical photography, kiln, oil-based paints, adhesives, etc). Health and Safety in conjunction with the Chemical Safety Committee would like to review and access these processes and chemicals to make sure that we are ensuring safety in Visual Arts. The same process will be used that was used for Science safety improvements.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*

   New Initiative requests for 2015/16 are focused solely on the following strategic directions:

   1. Technology for Student Learning & Achievement
   2. Student Learning & Well-being
   3. Staff Well-being & Wellness
   4. Communications/Engagement

   a. *Identify the appropriate strategic category for this request:*

   > Staff Well-being & Wellness

   b. *Goal/Outcome:*

   b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

   > The outcomes of a Visual Arts chemical safety audit will provide guided focus for the Chemical Safety Committee/H&S as we develop best management practices and direction for the safe purchase, storage, handling and disposal of chemicals used in visual arts at our secondary schools (alike the improvements made in Science). The benefits will be directly realized by the staff who work in the VA departments and will ultimately manage risk for the school board.

   b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

   > This intiative is the first stage of a review process that directly affects and benefits staff well-being and wellness by identifying areas of needed improvement related to the purchase, safe storage and use of flammable, combustible and/or toxic chemicals handled and used by visual arts staff on a daily basis. Example: In wet photo-chemical processing, we will review the hazards associated with the chemicals used, safe handing procedures, hazard controls (ventilation), and flammable storage.

   b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

   > The audit is the beginning stage of health and safety improvements for visual arts where health risk will be assessed by the external contractor performing the audit. The audit results will be reviewed, priorities set and actions will be taken to proceed with making improvements. The Chemical Safety Committee will be reviewing and accessing feasibility of recommendations for improvements, and those with budget implications will be brought forward through appropriate channels.

1:19 PM 02/03/2015 ChemSafety-Visual Arts-Feb28-2015.xlsx \ Business Summary

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

> This audit will be conducted in the 2015-2016 year. If there are any recommendations that require funds beyond this allocation, it will be brought forward during the 2016-2017 budgetting process.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
      This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
      phase-in periods in the section below.

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget_
> _savings from other budget areas, other sources-specify._

2015/16 budget year:
Projected Budget Commitment $:	$27,120
Types of Costs/Resources:	
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:
Projected Budget Commitment $:	
Types of Costs/Resources:	
Source of Funding:	

2017/18 budget year:
Projected Budget Commitment $:	
Types of Costs/Resources:	
Source of Funding:	

2018/19 budget year:
Projected Budget Commitment $:	
Types of Costs/Resources:	
Source of Funding:	

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

1:19 PM 02/03/2015 ChemSafety-Visual Arts-Feb28-2015.xlsx \ Business Summary

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> Currently, all grade 2 students in the WRDSB have access to Dreambox. The proposal of the new initiative is to extend Dreambox access to all grade 1 students on an annual basis. Research in the WRDSB has found that "early intervention" is most effective in supporting student needs. Dreambox will act as an early identification tool and will inform teachers' instruction from an early age.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> 1. Technology for Student Learning & Achievement
> 2. Student Learning & Well-being
> 4. Communications/Engagement (link to home use and parent support)

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> Dreambox will promote an important foundational aspect of mathematics achievement, in combination with classroom instruction. The target group (grade 1 and 2 students) will have opportunities to receive early numeracy support in an effort to close gaps early and identify students at risk through the use of ongoing data. The goals of this initiative are for early identification of student needs and supporting differentiated instruction and universal design for learning.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> This project aims to support student achievement and identify students that may require greater support in mathematics, before gaps in learning appear and/or increase. The plan for this initiative also provides key links between program and special education resources. Students can also access Dreambox from home providing opportunities for parent engagement.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> The data received through Dreambox is well detailed and easy to access. There is the ability to examine student use and to determine areas of student strength and need. Teachers can use this data to inform instruction. Principals can use this data to note patterns and trends in learning and specific students can be flagged for further interventions. This data can also be used system-wide to examine potential resource gaps and to identify system needs in the area of numeracy.

2015/16 Budget

"New Initiative" Business Summary

3. _Scope of Project:_

a. _Implementation Timeframe for this Initiative:_

Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
Provide details.

> We have been using Dreambox in various initiatives since 2012. We would like to extend Dreambox use to all grade 1 and 2 students, as well as grade 3 students who are in a combined 2/3 class. There is a belief that improved outcomes would result in both provincial EQAO measures, as well as across other areas of math. A commitment to use Dreambox with this targeted group for a few years, would support gap closing measures and determine if Dreambox is a viable early identification tool.

b. _Projected Implementation Costs:_

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

**2015/16 budget year:**

Projected Budget Commitment $: [ ]

Types of Costs/Resources: **Purchase of Additional Site-Licenses - grades 1, 2, and 2/3**

Source of Funding: **2015/16 New Initiative request**

**2016/17 budget year:**

Projected Budget Commitment $: [ ]

Types of Costs/Resources: **Purchase of Additional Site-Licenses - grades 1, 2, and 2/3**

Source of Funding: **Through Board Budget (approved New Initiative in 2015-16)**

**2017/18 budget year:**

Projected Budget Commitment $: [ ]

Types of Costs/Resources: **Purchase of Additional Site-Licenses - grades 1, 2, and 2/3**

Source of Funding: **Through Board Budget (approved New Initiative in 2015-16)**

**2018/19 budget year:**

Projected Budget Commitment $: [ ]

Types of Costs/Resources: **Purchase of Additional Site-Licenses - grades 1, 2, and 2/3**

Source of Funding: **Through Board Budget (approved New Initiative in 2015-16)**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:

Types of Costs/Resources: **Purchase of Additional Site-Licenses - grades 1, 2, and 2/3**

Source of Funding: **Through Board Budget (approved New Initiative in 2015-16)**

WATERLOO REGION DISTRICT SCHOOL BOARD

New Initiatives – Funded via Base Budget Realignments

June 10, 2015

2015/16 NEW INITIATIVE REQUESTS

APPENDIX H

REPORT @ June 1, 2015

	These requests will be addressed in discussions with departments to fund in the current year (2014-15) or develop strategies to reallocate existing base budget funding to incorporate these items into the 2015-16 Budget	2015-16 Original Request Amount	2015-16 FTE
Ref. #	Details		
	B. PROPOSED REQUESTS TO BE FUNDED FROM EXISTING BASE BUDGETS		
A8.	**Addition of wireless infrastructure:** Current wireless infrastructure requires additional funding to add additional capacity and coverage and improve performance.	1,500,000	
A11.	**Online student registration system:** An online student registration system will streamline the pupil registration process for all schools and make it easier and convenient for parents to register their child.	52,738	
A14.	**Addition of an HR Officer:** As a result of the MOUs with Bargaining Units, and increased requests by the Ministry of Education for accurate and timely data, an addition of an HR Officer is required.	97,100	1.00
A15.	**Addition of an Employee Wellness Officer:** The officer will provide expertise in the field of Disability Management to support the Employee Wellness Division of HR.	96,700	1.00
A12.	**Expand eBook collection:** Current eBook collection requires on-going funding to ensure the collection remains current and meets student needs. Shift in purchases from books to eBooks.	80,000	
A16.	**Update WHIMIS online training videos:** The new federal standards for the Global Harmonization System requires the WHIMIS online training videos to be updated.	20,340	
A17.	**Health, Safety & Security temporary online training assistant:** Health, Safety and Security requires temporary support each year for to administer the training records, provide customer service, create training reports, work with contractor to update training materials and enhance communication of the on-line mandatory health and safety training.	13,680	
A19.	**Automated employee absence reporting system:** A new automated employee absence system is required because the current system (i.e. Subfinder) will not be supported as of July 31, 2016.	80,000	
A20.	**Enhanced interpretive services for immigrant and refugee families:** The demand for interpretive services for the parents of our English Language Learners enrolled in our schools continues to rise due to the high immigration rate for our region.	14,700	
	GRAND TOTAL	1,955,258	2.00

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*
a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> There are 28,000 mobile devices connecting to the Board's wireless network each day. The use of Mobile Technologies by students and staff continue to grow 30% annually. This explosive growth in wireless demand is driven by the Board's continued investment in mobile technologies as well as the incease in BYOD by students. Our current wireless infrastructure requires funding to add additional capacity and coverage in order to keep ahead of this growing demand.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*
New Initiative requests for 2015/16 are focused solely on the following strategic directions:
1. *Technology for Student Learning & Achievement*
2. *Student Learning & Well-being*
3. *Staff Well-being & Wellness*
4. *Communications/Engagement*

a. *Identify the appropriate strategic category for this request:*

> 1. Technology for Student Learning & Achievement - Primary
> 2. Student Learning & Well-being
> 3. Staff Well-being & Wellness
> 4. Communications/Engagement
> This initiative is fundamental to the success of all areas of WRDSB strategic directions

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> Additional APs will be added to classrooms and common areas like the library, gym, cafe and office areas. Overall schools will double their number of Wireless Access Points to provide the appropriate capacity and coverage for the schools' mobile technology needs to support student learning.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> Classroom activities depend on a reliable and dependable wireless network that is available throughout the school.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Effectiveness can be evaluated by obtaining feedback from schools regarding the reliability and dependability of their wireless network. Schools should be able to use their mobile digital tools and resources any time, on any device and anywhere within the school without issue in order to support teaching, learning, collaboration and knowledge creation.

2015/16 Budget

"New Initiative" Business Summary

3. **Scope of Project:**

a. **Implementation Timeframe for this Initiative:**

Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
Provide details.

> IT Services has been investing annually over the past 2 years to upgrade 30% of the schools. To keep ahead of this growing demand on the wireless network, an investment of $3 million is being requested to finish the remaining 70% of schools. The initiative could be implemented within 36 months depending on various vendors' lead times to delivery products and install cabling.

b. **Projected Implementation Costs:**

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below.*

> **Note:**
> *Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify.*

2015/16 budget year:

Projected Budget Commitment $:	$1,500,000
Types of Costs/Resources:	Capital - Hardware and Installation
Source of Funding:	2015/16 New Initiative request

2016/17 budget year:

Projected Budget Commitment $:	$750,000
Types of Costs/Resources:	Capital - Hardware and Installation
Source of Funding:	2016/17 New Initiative request

2017/18 budget year:

Projected Budget Commitment $:	$750,000
Types of Costs/Resources:	Capital - Hardware and Installation
Source of Funding:	2017/18 New Initiative request

2018/19 budget year:

Projected Budget Commitment $:	$100,000
Types of Costs/Resources:	Expense - Hardware maintenance
Source of Funding:	augment ITS base budget

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $100,000

Types of Costs/Resources: | **Expense - Hardware maintenance**

Source of Funding: | **augment ITS base budget**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> On an annual basis, the Board registers approximately 4,500- 5,000 new students (JK-SK) between January and April. The current process is paper based, and feedback from parents has indicated that they find the process difficult to manage, information is unclear, and registration dates/times are not convenient (dropping forms off between the hours of 8:30 and 4 do not aling with many peoples work schedules).

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> This request relates to Communications/ Engagement and Staff Well-being & Wellness.

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> The short-term objective of this initiative is to improve the collection of information for new registrations (4,500- 5,000), and make it easier and more convenient for parents to register their child. It will also contribute to a more streamlined process across the Board. This initiative will also produce signifcant time savings for school-office staff, who now spend approximately 8-12 minutes entering new registration data into Trillium (conservatively 835 hrs staff time annually).

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> This request relates to Communications/ Engagement because it will streamline the registration process for all schools and make it easier and more convenient for parents to register their child for school. It also relates to Staff Well-being & Wellness because there will be less stress on school-office staff to enter registration data into trillium by pre-set dates.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Through the new system we have the ability to imbed additional documentation or links that are not specifically related to student registration. Our proposal would be that we include a short parent-satisfaction survey to gain insight on their experience and identify opportunities for improvement. We will also be able to quantify the amount of time saved based on metrics already developed (minutes per registration).

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
Provide details.

> System testing and integration to occur between May-August 2015. Full implementation of the online registration process will occur in September 2015 (soft launch). The Board's primary recruitment drive occurs in January-April for kindergarten registration (January-April 2016).

b. **_Projected Implementation Costs:_**

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below.*

> **Note:**
> *Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify.*

2015/16 budget year:

Projected Budget Commitment $: | $62,000

Types of Costs/Resources: | **Fees and contracts, staff training.**

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $: | $10,500

Types of Costs/Resources: | **Fees and Contracts- Annual Maintenance Fee**

Source of Funding: | **Base Budget Savings (Staff Time- Paper)**

2017/18 budget year:

Projected Budget Commitment $: | $10,500

Types of Costs/Resources: | **Fees and Contracts- Annual Maintenance Fee**

Source of Funding: | **Base Budget Savings (Staff Time- Paper)**

2018/19 budget year:

Projected Budget Commitment $: | $10,500

Types of Costs/Resources: | **Fees and Contracts- Annual Maintenance Fee**

Source of Funding: | **Base Budget Savings (Staff Time- Paper)**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:	$10,500
Types of Costs/Resources:	**Fees and Contracts- Annual Maintenance Fee**
Source of Funding:	**Base Budget Savings (Staff Time- Paper)**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **Purpose for the request:**

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/problem that this initiative will address.*

> eBook platforms are rapidly being adopted in school boards across Canada. Although eBooks can be searched through the library catalogue, the collection stands alone and is separate from our print resources. We need sufficient funds to maintain the collection over time, adding new titles as needed, and building the collection to a suitable size for our (potential) 62,000 student users. A proprely maintained eBook collection will improve student engagement through additional choice in reading.

2. **Key Focus for the 2015/16 Budget for "New Initiative" requests:**

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. *Technology for Student Learning & Achievement*

2. *Student Learning & Well-being*

3. *Staff Well-being & Wellness*

4. *Communications/Engagement*

a. *Identify the appropriate strategic category for this request:*

> 1. Technology for Student Learning & Achievement

b. **Goal/Outcome:**

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> To build and maintain a new collection of resources for our students, one that encourages the adoption of new technologies for student learning.
> eBooks can be costly (under the current pricing models) but do not suffer the wear and tear of print books so last much longer. Over time we will be able to redirect funds from print resources towards the maintenance of the digital collections.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> 1. Technology for Student Learning & Achievement
> eBooks are forward thinking technology. They promote student voice and choice in selection of resources, which in turn promotes engagement. The eBook library will encourage adoption of IT around the board.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> eBook platforms collect user statistics for all items. We will be able to monitor the use of our products, make purchases based on user demands, and identify locations that are under utilizing the products so that we may target those locations for additional instruction and support.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > The eBook library will need to be maintained over time. All library collections - including eBooks - requires constant care and feeding so that new and relevant materials are available to students. In years ahead as the new technology catches on and as students become increasingly equipped with reading devices we continue to redirect funds away from print resources towards augmenting the digital resources.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
      This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $:	$80,000
Types of Costs/Resources:	**Supplies & Services**
Source of Funding:	**2015/16 augment base budget. Reduce secondary text budget (shift digital)**

2016/17 budget year:

Projected Budget Commitment $:	$80,000
Types of Costs/Resources:	**Supplies & Services**
Source of Funding:	**augmented base budget. Reduce secondary text budget (shift digital)**

2017/18 budget year:

Projected Budget Commitment $:	$80,000
Types of Costs/Resources:	**Supplies & Services**
Source of Funding:	**augmented base budget. Reduce secondary text budget (shift digital)**

2018/19 budget year:

Projected Budget Commitment $:	$80,000
Types of Costs/Resources:	**Supplies & Services**
Source of Funding:	**Reduce print budget $20,000. Reduce secondary text budget (shift digital)**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: $80,000

Types of Costs/Resources: **Supplies & Services**

Source of Funding: **Reduce print budget $40,000. Reduce secondary text budget (shift digital)**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. _Purpose for the request:_
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/_
   problem that this initiative will address.

> As a result of MOUs with Bargaining Units, Regulations, and increased requests by the MofE for accurate and timely data from our Board, an addition of an HR Officer is reqested. The MofE provided funding so we could hire additional support to implement and meet the various agreements reached between the Government and the Unions. The funding is no longer available. The need to manage the agreements, comply with MofE data requests through Finance, etc. remains and no

2. _Key Focus for the 2015/16 Budget for "New Initiative" requests:_
   New Initiative requests for 2015/16 are focused solely on the following strategic directions:
   1. _Technology for Student Learning & Achievement_
   2. _Student Learning & Well-being_
   3. _Staff Well-being & Wellness_
   4. _Communications/Engagement_

a. _Identify the appropriate strategic category for this request:_

> The request would fall under the following strategic directions: Student Learning & Well-being, Staff Well-being & Wellness and Communications/Engagement.

b. _Goal/Outcome:_

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative_
   and the benefits (e.g. potential savings, area of improvement) that will be realized.

> In the short term, it will ease the work pressures placed on staff who are completing their assigned roles and responsibilities. Long term, it will ensure the Board has acurate and timely information securing the most funding possible to support Student Achievement and Well-being. As well, through continued efforts on hiring practices and intakes for staff and supply staff, the goal is to reduce fail to fills, increase the quality of staff hired thus ensuring quality instruction for students.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and_
   directions, noted above.

> In order to support Student Achievement and Well-being, we require well trained and qualified staff. Ensuring that we have appropriate staff (permanent and supply) within in the appropriate Acts, Regulations. Through accurate information and data, we will ensure with Finance that we achieve the most funding possible to the Board to meet its strategic directions.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> With respect to the hiring process, we will be able to compare the amount of fail to fills from previous years to future years. Through a concerted effort, the goal would be to see a reduction in the number of unfilled jobs. In terms of data requests and data compliance, checks and balances would be in place so that both HR and Finance will ensure maximum access to funding compared to previous years.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > The position would continue beyond the 2015-16 budget year. The request initially will address current pressures left as a result of funding discontinuance by the Ministry and address ongoing realities created through negotiations with the Ministry and labour groups (greater accountability) as well as initiatives identified by the Ministry for Boards to engage in and comply with.

b. **_Projected Implementation Costs:_**

(b1). **_If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._**
   This information MUST agree to first tab of the workbook.

b(2). **_If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._**

   > **Note:**
   > **Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify.**

2015/16 budget year:

Projected Budget Commitment $:	**$97,100**
Types of Costs/Resources:	**salary and benefits**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	**$99,500**
Types of Costs/Resources:	**approx. salary and benefits (reflects grid step move) no % increase added**
Source of Funding:	**built into base budget future years from 2015/16 budget**

2017/18 budget year:

Projected Budget Commitment $:	**$102,100**
Types of Costs/Resources:	**approx. salary and benefits (reflects grid step move) no % increase added**
Source of Funding:	**built into base budget future years from 2015/16 budget**

2018/19 budget year:

Projected Budget Commitment $:	**$104,700**
Types of Costs/Resources:	**approx. salary and benefits (reflects grid step move) no % increase added**
Source of Funding:	**built into base budget future years from 2015/16 budget**

2015/16 Budget

"New Initiative" Business Summary

**2019/20 budget year:**

Projected Budget Commitment $: $107,400

Types of Costs/Resources: **approx. salary and benefits (reflects grid step move) no % increase added**

Source of Funding: **built into base budget future years form 2015/16 budget**

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/_
   problem that this initiative will address.

> Due to the legistlative changes that were implimented in 2012 regarding sick leave benefits for all public sector boards there has been a significant increase in the amount and complexity of staff medical leaves since 2012-13 school year. The average number of claims has risen by 33% from 600 (2010-12) to 900+ (2013-2015). This does not include 500+ WSIB/LTD/Ergo cases. Complex claims constitute 40% of all current claims including mental health, neurological and chronic conditions.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**
New Initiative requests for 2015/16 are focused solely on the following strategic directions:
   1. Technology for Student Learning & Achievement
   2. Student Learning & Well-being
   3. Staff Well-being & Wellness
   4. Communications/Engagement

a. _Identify the appropriate strategic category for this request:_

> Staff Well-being and Wellness

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative_
   and the benefits (e.g. potential savings, area of improvement) that will be realized.

> The short term goal is to provide improved early intervention services which can be realized in improved service to our administrators and staff. A reduction in the duration of medical leaves with a focus on mental health claims. Allowing for a resource to focus on strategic goals and mental health strategy. The long-term goal is to create a culture of wellness through on-going initiatives and support for staff and administration; to continue to assess and impliment best practices thr

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and_
   directions, noted above.

> This initiative aligns with the board's plan to foster wellness and well-being. Through providing effective early intervention services results can bee seen in increased early and successful return to work. With increased focus on the boards mental health strategy Employee Wellness will deliver on supporting our schools, our administrators with tangible programs and practices through our department as well as our Employee Assistance Provider.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> Number and duration of Mental Health Claims
> Employee Wellness Survey

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > Ongoing Initiative

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
   phase-in periods in the section below.

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget_
> _savings from other budget areas, other sources-specify._

2015/16 budget year:
Projected Budget Commitment $: | $96,700

Types of Costs/Resources: | **Salary/Benefits**

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**

a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address._

> Online training for health and safety has been successfully delivered for 4 years now, and in order to continue with this model, the H&S dept requires on-going funding to provide the resources needed to administer the training records, provide customer service to staff, create training reports and communications. In addition, for this year the individual will be required to work with a contractor to update our WHMIS training modules to the new regulations for Global Harmonization System.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. _Identify the appropriate strategic category for this request:_

> Staff Well-being & Wellness

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized._

> This funding will provide the means for the department to have a consistent model for the management of mandatory online training records for health and safety during the first term of the school year.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above._

> Mandatory health and safety training is a legal requirement under the Occupational Health and Safety Act which directly relates to the Board's committment to providing a safe workplace for staff and students and ultimately impacts staff and student well-being and wellness.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> The effectiveness of this initiative is measured by the administering of training records and follow-up with staff who have not completed the training, which is completed by the end of December each year.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

N/A

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

Note: _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

   2015/16 budget year:
   Projected Budget Commitment $: | $34,020 |

   Types of Costs/Resources: | |

   Source of Funding: | **2015/16 New Initiative request** |

   2016/17 budget year:
   Projected Budget Commitment $: | $13,680 |

   Types of Costs/Resources: | **base budget** |

   Source of Funding: | |

   2017/18 budget year:
   Projected Budget Commitment $: | $13,680 |

   Types of Costs/Resources: | **base budget** |

   Source of Funding: | |

   2018/19 budget year:
   Projected Budget Commitment $: | $13,680 |

   Types of Costs/Resources: | **base budget** |

   Source of Funding: | |

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $13,680

Types of Costs/Resources: | base budget

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. ***Purpose for the request:***
a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> Online training for health and safety has been successfully delivered for 4 years now, and in order to continue with this model, the H&S dept requires on-going funding to provide the resources needed to administer the training records, provide customer service to staff, create training reports and communications. In addition, for this year the individual will be required to work with a contractor to update our WHMIS training modules to the new regulations for Global Harmonization System.

2. ***Key Focus for the 2015/16 Budget for "New Initiative" requests:***

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> Staff Well-being & Wellness

b. ***Goal/Outcome:***

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> This funding will provide the means for the department to have a consistent model for the management of mandatory online training records for health and safety during the first term of the school year.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> Mandatory health and safety training is a legal requirement under the Occupational Health and Safety Act which directly relates to the Board's committment to providing a safe workplace for staff and students and ultimately impacts staff and student well-being and wellness.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> The effectiveness of this initiative is measured by the administering of training records and follow-up with staff who have not completed the training, which is completed by the end of December each year.

2015/16 Budget

"New Initiative" Business Summary

3. **Scope of Project:**

a. **Implementation Timeframe for this Initiative:**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > N/A

b. **Projected Implementation Costs:**

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
      This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of*
      phase-in periods in the section below.

> **Note:**
> Under "Source of Funding" category, examples would include: New Initiative request, base budget
> savings from other budget areas, other sources-specify.

2015/16 budget year:

Projected Budget Commitment $: | $34,020

Types of Costs/Resources: |

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $: | $13,680

Types of Costs/Resources: | **base budget**

Source of Funding: |

2017/18 budget year:

Projected Budget Commitment $: | $13,680

Types of Costs/Resources: | **base budget**

Source of Funding: |

2018/19 budget year:

Projected Budget Commitment $: | $13,680

Types of Costs/Resources: | **base budget**

Source of Funding: |

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:	$13,680
Types of Costs/Resources:	base budget
Source of Funding:	

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
   a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address._

   > Effective July 1, 2016 the WRDSB will be required to transition to another employee absence reporting system. This initiative will permit the Board to access and transition (including training) to this new system. This initiative includes $50,000 ongoing annual costs, as well as one time costs for system upgrade ($20,000) and training ($10,000).

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**
   New Initiative requests for 2015/16 are focused solely on the following strategic directions:
   1. Technology for Student Learning & Achievement
   2. Student Learning & Well-being
   3. Staff Well-being & Wellness
   4. Communications/Engagement

   a. _Identify the appropriate strategic category for this request:_

   > Staff Well-being and Wellness

   b. **_Goal/Outcome:_**

   b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized._

   > The short term goal of this initiative is to facilitate the transition to a new employee absence reporting system.

   b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above._

   > This initiative aligns with the board's plan to foster wellness and well-being.

   b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

   > Effective deployment of substitute staff to cover absences.

2015/16 Budget

"New Initiative" Business Summary

3. *Scope of Project:*

a. *Implementation Timeframe for this Initiative:*
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   NA

b. *Projected Implementation Costs:*

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
   This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of*
   phase-in periods in the section below.

   Note:
   Under "Source of Funding" category, examples would include: New Initiative request, base budget
   savings from other budget areas, other sources-specify.

2015/16 budget year:
Projected Budget Commitment $: $30,000

Types of Costs/Resources: **Fees and Contracts**

Source of Funding: **2015/16 New Initiative request**

2016/17 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

<u>_2019/20 budget year:_</u>

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/
problem that this initiative will address._

> The demand for interpretive services by our immigrant and refugee families continues to rise. In 2013-14, $22,100 was allocated to Fees & Contracts for this purpose . This was increased to $25,300 in 2014-15, which has pretty much already been spent. Since this is not a service that we can withdraw, it appears that this budget will be vastly overspent this year. To help ensure that this does not happen in the future, we would like to increase this allocation to $40,000.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. _Technology for Student Learning & Achievement_

2. _Student Learning & Well-being_

3. _Staff Well-being & Wellness_

4. _Communications/Engagement_

a. _Identify the appropriate strategic category for this request:_

> 4. Communications/Engagement

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative
and the benefits (e.g. potential savings, area of improvement) that will be realized._

> The demand for interpretive services is highly variable from one year to the next and is dependent on the population of English Language Learners (ELLs) enrolled in our schools. The immigration rate for the Waterloo Region remains high and, in all likelihood, will increase. Efficient communication between school staffs and our ELL population is crucial to the success of these students.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and
directions, noted above._

> Parents/guardians are key partners in the education of our students. Effective communication between parents/guardians and school staff helps parents feel more engaged in their children's learning. This is especially important when working with families for whom English is a second language. Effective communication helps to ensure that the family and school can work to gether to support these students and help them to be successful.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> As is current practice, we will continue to monitor: the demand for interpretive services, the various purposes for which the services are being accessed, and anecdotal feedback from all stakeholders (parents, students, school staff, settlement workers)

2015/16 Budget

"New Initiative" Business Summary

3. _Scope of Project:_

a. _Implementation Timeframe for this Initiative:_

Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)

Provide details.

> In 2013-14, the budget for Interpretive Services was fully spent. For 2014-15, it is anticipated that this budget will be overspent. This request is being made to help ensure that adequate funding is available for interpretive services for 2015-16 and beyond.

b. _Projected Implementation Costs:_

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below._

> _Note:_
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $:	40000 (existing 25,300 + 14,700 of new funding)
Types of Costs/Resources:	**Contracted interpretive services through the KW Multicultural Centre**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	$40,000
Types of Costs/Resources:	**Contracted interpretive services through the KW Multicultural Centre**
Source of Funding:	**Built into budget for ESL for 2015/16 and going forward**

2017/18 budget year:

Projected Budget Commitment $:	
Types of Costs/Resources:	
Source of Funding:	

2018/19 budget year:

Projected Budget Commitment $:	
Types of Costs/Resources:	
Source of Funding:	

2015/16 Budget

"New Initiative" Business Summary

<u>_2019/20 budget year:_</u>

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

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WATERLOO REGION DISTRICT SCHOOL BOARD

New Initiatives – Deferred to Future Budget Discussions

June 10, 2015

2015/16 Budget

2015/16 NEW INITIATIVE REQUESTS

REPORT @ June 1, 2015

Ref. #	Details	2015-16 Original Request Amount	2015-16 FTE
	Deferred to the 2016/17 budget discussions for additional information and consideration		
C.	**REQUESTS DEFERRED TO FUTURE BUDGET DISCUSSIONS**		
A2.	**Current Laserfiche Infrastructure Maintenance:** This request addresses the need for ongoing support for the existing Laserfiche infrastructure currently in place.	**25,000**	
A3.	**Expansion of Laserfiche Project:** Integrate Electronic Document Management (EDM) as a cornerstone business tool. The supports required for expansion would cover the costs for licensing and training for school staff to access records within Laserfiche, provide a public portal for access to public Board minutes and provide for consultative services and hardware (e.g. scanner)	563,000	
A6.	**Expand and Enhance the Communication System:** Purchase of a unified messaging system that will be used by all staff. Voice mail messages will be converted to email and housed in an individual's e-mail inbox. This initiative deals with the telecom infrastructure only; replacement handsets are not factored into this initiative.	250,000	
A7.	**Consulting and THR funding for ITS Department:** For project support.	100,000	
A10.	**Web based mass communications tool:** Tool to send voice and electronic messages.	250,000	
A13.	**Google Apps for Education (GAFE) enhancements:** Move file storage for student and staff work into the GAFE space in the cloud.	25,000	
	GRAND TOTAL	**1,213,000**	**0.00**

2015/16 Budget

<u>*"New Initiative" Business Summary*</u>

<u>(Note: Maximum length per text box is 500 characters)</u>

1. <u>*Purpose for the request:*</u>

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> The WRDSB implemented the Laserfiche electronic document management system in 2011. At that time, the one-time allocation of funds was for the initial implementation. Now that Laserfiche is a core business process, we need to ensure the on-going support and sustainability of this tool.

2. <u>*Key Focus for the 2015/16 Budget for "New Initiative" requests:*</u>

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> Communications/Engagement

b. <u>*Goal/Outcome:*</u>

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> The use of Laserfiche is now an integral part of how Human Resource Services, Financial Services, Purchasing, student records and Corporate Services do business. Continuous improvement and the implementation of new upgrades requires a level of consulting services. This initiative addresses on-going support for those processes already in place and allows for new upgrades and toolsets to be introduced.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> Efficiencies in work processes and in communicating with stakeholders has been a key driver in the various department implementation strategies. Using this tool has made it easier for staff and the general public to interact with various departments.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Continued development of web forms, enhanced business processes and the corresponding reduction in paper and staff time for processing will allow us to measure the effectiveness of our continued use of the tool.

2015/16 Budget

"New Initiative" Business Summary

3. _Scope of Project:_

a. _Implementation Timeframe for this Initiative:_
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   This initiative is for the on-going support of the portions of Laserfiche already in place.

b. _Projected Implementation Costs:_

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
   This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
   phase-in periods in the section below.

   Note:
   Under "Source of Funding" category, examples would include: New Initiative request, base budget
   savings from other budget areas, other sources-specify.

2015/16 budget year:
Projected Budget Commitment $: $25,000

Types of Costs/Resources: Scanner replacement and maintenance, plus consulting fees

Source of Funding:

2016/17 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:
Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*
a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> As Laserfiche continues to expand throughout the organization as a cornerstone business tool, there will be on-going maintenance costs associated with the licensing of the product.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*
New Initiative requests for 2015/16 are focused solely on the following strategic directions:
1. Technology for Student Learning & Achievement
2. Student Learning & Well-being
3. Staff Well-being & Wellness
4. Communications/Engagement

a. *Identify the appropriate strategic category for this request:*

> Communications/Engagement

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> Required maintenance costs for licensing.

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> On-going strategic investment in infrastructure.

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Without the on-going funds to support the expansion, staff and the public will no longer be able to use the tools.

2:19 PM 26/02/2015 NewInitiative_201516 LSAP.xlsx \ Business Summary

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   [blank box]

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
phase-in periods in the section below.

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget_
> _savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $: **$55,000**

Types of Costs/Resources: **LSAP on licenses**

Source of Funding: **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. *Purpose for the request:*

a. *Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address.*

> This allocation of funds will enable continued expansion of Laserfiche into new areas. It would cover the costs for licensing and training for school staff to be able to access records within Laserfiche repositories, provide a public portal for access to public Board minutes and provide for consultative services to create new repositories for other areas of expansion.

2. *Key Focus for the 2015/16 Budget for "New Initiative" requests:*

New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. *Technology for Student Learning & Achievement*

2. *Student Learning & Well-being*

3. *Staff Well-being & Wellness*

4. *Communications/Engagement*

a. *Identify the appropriate strategic category for this request:*

> Communications/ Engagement

b. *Goal/Outcome:*

b(1). *Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized.*

> These funds would support the continued expansion of our electronic document system into new areas and would provide access for more people into certain key areas of existing repositories (e.g. public Board minutes, employee site files, student transcripts and office index cards).

b(2). *Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above.*

> Employees will be able to retrieve information faster, providing better customer service and reducing staff time to respond to requests. The public will have on-demand access to documents which were previously unavailable (i.e. Board minutes).

b(3). *How do you plan to measure the effectiveness of this initiative once project has been implemented?*

> Effectiveness can be measured through satisfaction surveys, by monitoring traffic to the information and through a reduction of requests for records to the Imaging department.

2015/16 Budget

"New Initiative" Business Summary

3. **Scope of Project:**

a. **Implementation Timeframe for this Initiative:**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > This is a one-time initiative to continue to grow an existing system.

b. **Projected Implementation Costs:**

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of phase-in periods in the section below.*

> **Note:**
> Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify.

2015/16 budget year:

Projected Budget Commitment $: **$508,000**

Types of Costs/Resources: **up front licensing, consulting, hardware, training**

Source of Funding: **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2017/18 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2018/19 budget year:

Projected Budget Commitment $:

Types of Costs/Resources:

Source of Funding:

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/_
   problem that this initiative will address.

> The reason for this request is to continue to provide enhanced communication with our staff and students as well as provide better service to our clients. Provide $144,000 per year in annual savings by

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**
   New Initiative requests for 2015/16 are focused solely on the following strategic directions:
   1. Technology for Student Learning & Achievement
   2. Student Learning & Well-being
   3. Staff Well-being & Wellness
   4. Communications/Engagement

a. _Identify the appropriate strategic category for this request:_

> 3. Staff Well-being & Wellness
> 4. Communications/Engagement

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative_
   and the benefits (e.g. potential savings, area of improvement) that will be realized.

> 2015/2016 - unified communication and centralization of voice messaging for all staff. Automate the school board staff and school directory making staff lists redundant. Stream line the ITS service desk. 2016/2017 - start eliminating voice messaging systems in schools. (expected savings of 20k per year) Reduce school based maintenance (2k) year. Streamlines customer service for alll staff and students.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and_
   directions, noted above.

> Simplifies communication patterns for all staff, students and parents. All messages are in one place allowing staff one mechanism for retrieval.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> 2015/2016 - complete conversion yes/no
>
> 2016/2017 - start process of current voice messaging system removal. Reduce paper based process for staff lists.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**

Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
Provide details.

> 2015/2016 - Capital equipment and software in year one.
> 2016/2017 - refine processes and eliminate current voice messaging systems. Eliminate paper based process

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
phase-in periods in the section below.

> **Note:**
> _Under "Source of Funding" category, examples would include: New Initiative request, base budget savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $: | $250,000

Types of Costs/Resources: | **capital budget.**

Source of Funding: | **2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $: | $30,000

Types of Costs/Resources: | **augment base budget - maintenance**

Source of Funding: | **additional funds**

2017/18 budget year:

Projected Budget Commitment $: | $30,000

Types of Costs/Resources: | **augment base budget - maintenance**

Source of Funding: | **additional funds**

2018/19 budget year:

Projected Budget Commitment $: | $30,000

Types of Costs/Resources: | **augment base budget - maintenance**

Source of Funding: | **eliminate VM systems, maintenance costs and line costs of $144, 000 annual**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $30,000

Types of Costs/Resources: | augment base budget - maintenance

Source of Funding: | eliminate VM systems, maintenance costs and line costs of $144, 000 annual

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. _**Purpose for the request:**_
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address._

> Consulting/THR for all board initiatives. All board initiatives from most departments require some amount of ITS time in order to complete their projects. We are requesting funds be set aside to assure the success of WRDSB prioritized initiatives

2. _**Key Focus for the 2015/16 Budget for "New Initiative" requests:**_
New Initiative requests for 2015/16 are focused solely on the following strategic directions:
**1. Technology for Student Learning & Achievement**
**2. Student Learning & Well-being**
**3. Staff Well-being & Wellness**
**4. Communications/Engagement**

a. _Identify the appropriate strategic category for this request:_

> 1. Technology for Student Learning & Achievement
> 2. Student Learning & Well-being
> 3. Staff Well-being & Wellness
> 4. Communications/Engagement

b. _**Goal/Outcome:**_

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized._

> Assures the success of board driven initiatives

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above._

> It ensures that the board can meet its prioritized targets.

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> Project management reporting.

2015/16 Budget

"New Initiative" Business Summary

3. **Scope of Project:**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > Yes. This is something that occurs every year.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
      This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
      phase-in periods in the section below.

   > **Note:**
   > _Under "Source of Funding" category, examples would include: New Initiative request, base budget_
   > _savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $:	$100,000
Types of Costs/Resources:	**contracts and fees**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	$100,000
Types of Costs/Resources:	**contracts and fees**
Source of Funding:	**base budget**

2017/18 budget year:

Projected Budget Commitment $:	$100,000
Types of Costs/Resources:	**contracts and fees**
Source of Funding:	**base budget**

2018/19 budget year:

Projected Budget Commitment $:	$100,000
Types of Costs/Resources:	**contracts and fees**
Source of Funding:	**base budget**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $100,000

Types of Costs/Resources: | contracts and fees

Source of Funding: | base budget

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/ problem that this initiative will address._

> As part of our Go Digital campaign we are looking to reduce our printing costs and enhance parent engagement. This tool will be very effective in assisting with streamling process around parent communication in the following areas: Attendance, transportation (ie: bus cancellations), school closures, schedule reminders like PD days, general school news, exam reminders. These are all areas where staff are challenged to meet parent engagement demands.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**
New Initiative requests for 2015/16 are focused solely on the following strategic directions:

1. Technology for Student Learning & Achievement

2. Student Learning & Well-being

3. Staff Well-being & Wellness

4. Communications/Engagement

a. _Identify the appropriate strategic category for this request:_

> 4. Communications/Engagement

b. **_Goal/Outcome:_**

b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative and the benefits (e.g. potential savings, area of improvement) that will be realized._

> Short term: Introduce and train on the new tools 2015/2016. Establish a new process.
> Long Term: Set print reduction targets as well as set goals to abandon the existing (old process) 2016/2017
> Long Term: Efficiencies from the new process will save time and produce a more staisfying result/experience for our parents. Staff will benefit with the improved process.

b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and directions, noted above._

> 3. Staff well-being and wellness: less time used to produce a better and more effective result.
> 4. Communications/Engagement: example parents are instantly notified when busses are not running. Parents are instantly notified when their child has not shown up for class. Parents are reminded about school schedules like PD days in advance

b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

> The tool will have reporting capabilities so we can measure and report on usage in a meanigful way. Examples: How many parents request an email(how many were sent). How many preffered a text (how many were sent) What % of parents have transitioned to the new process vs the paper process.
>
> What are the staff time savings achieved? How has this advantaged office staff and Principals

"New Initiative" Business Summary

3. **Scope of Project:**

a. **Implementation Timeframe for this Initiative:**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > completion of tool and training in the 2015/2016 school year.

b. **Projected Implementation Costs:**

(b1). *If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year".*
   This information MUST agree to first tab of the workbook.

b(2). *If the implementation period extends into future budget years, complete the appropriate number of*
   phase-in periods in the section below.

   > **Note:**
   > *Under "Source of Funding" category, examples would include: New Initiative request, base budget*
   > *savings from other budget areas, other sources-specify.*

2015/16 budget year:

Projected Budget Commitment $:	$250,000
Types of Costs/Resources:	**New initiative**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	$250,000
Types of Costs/Resources:	**base budget**
Source of Funding:	**communications department, ITS**

2017/18 budget year:

Projected Budget Commitment $:	$250,000
Types of Costs/Resources:	**base budget**
Source of Funding:	**communication department, ITS**

2018/19 budget year:

Projected Budget Commitment $:	$250,000
Types of Costs/Resources:	**base budget**
Source of Funding:	**communication department, ITS**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $250,000

Types of Costs/Resources: | base budget

Source of Funding: | communication department, ITS

2015/16 Budget

"New Initiative" Business Summary

(Note: Maximum length per text box is 500 characters)

1. **_Purpose for the request:_**
   a. _Identify the reasons for requesting this initiative. Include an explanation for the need/issue/
      problem that this initiative will address._

   > Most student and staff work will be converted from paper based to digital based mechanisms. GAFE is our chosen product for these types of files. In order for this to function properly ITS will need to be able to deal with GAFE accounts, associated files and document teacher and student communication in an expedient and secure fashion. These tools will assist in helping that occur.

2. **_Key Focus for the 2015/16 Budget for "New Initiative" requests:_**
   New Initiative requests for 2015/16 are focused solely on the following strategic directions:
   1. Technology for Student Learning & Achievement
   2. Student Learning & Well-being
   3. Staff Well-being & Wellness
   4. Communications/Engagement

   a. _Identify the appropriate strategic category for this request:_

   > 1. Technology for Student Learning & Achievement
   > 2. Student Learning & Well-being
   > 3. Staff Well-being & Wellness
   > 4. Communications/Engagement

   b. **_Goal/Outcome:_**

   b(1). _Describe the expected short-term & long-term operational goals and objectives of this initiative
         and the benefits (e.g. potential savings, area of improvement) that will be realized._

   > 2015 2016 Short term goals are to effectively put GAFE software and processes in place.
   > 2016 and forward these tools will assist in promoting reduction of paper based processes and local hardware based storage solutions to be elminated for our students and teachers. In addition GAFE is the long term replacement target for the WRDSB communication system as well a long term replacement product for school connect classroom management.

   b(2). _Explain how this initiative's outcome aligns with or is consistent with the Board's strategic plan and
         directions, noted above._

   > The GAFE initiative is the foundation for WRDSB document, and electronic communications. It strongly meets all 4 of our strategic directions.

   b(3). _How do you plan to measure the effectiveness of this initiative once project has been implemented?_

   > 2015 2016 - transition students and staff to GAFE file and document storage.
   > 2016 forward - start eliminating paper based process as well as local storage for students and teachers. measure paper reduction as well as local storage reductions.

2015/16 Budget

"New Initiative" Business Summary

3. **_Scope of Project:_**

a. **_Implementation Timeframe for this Initiative:_**
   Does the implementation period extend further than the 2015-16 budget year? (e.g. 5 year plan)
   Provide details.

   > Yes.

b. **_Projected Implementation Costs:_**

(b1). _If the initiative is a request for 2015-16 only, complete the section below under "2015-16 budget year"._
This information MUST agree to first tab of the workbook.

b(2). _If the implementation period extends into future budget years, complete the appropriate number of_
phase-in periods in the section below.

Note:
Under "Source of Funding" category, examples would include: New Initiative request, base budget _savings from other budget areas, other sources-specify._

2015/16 budget year:

Projected Budget Commitment $:	$25,000
Types of Costs/Resources:	**fees and contracts**
Source of Funding:	**2015/16 New Initiative request**

2016/17 budget year:

Projected Budget Commitment $:	**$25,000**
Types of Costs/Resources:	**fees and contracts**
Source of Funding:	**augment base budget, reduce waterworks, reduce paper, reduce time**

2017/18 budget year:

Projected Budget Commitment $:	$25,000
Types of Costs/Resources:	**fees and contracts**
Source of Funding:	**augment base budget, reduce waterworks, reduce paper, reduce time**

2018/19 budget year:

Projected Budget Commitment $:	$25,000
Types of Costs/Resources:	**fees and contracts**
Source of Funding:	**augment base budget, reduce waterworks, reduce paper, reduce time**

2015/16 Budget

"New Initiative" Business Summary

2019/20 budget year:

Projected Budget Commitment $: | $25,000

Types of Costs/Resources: | fees and contracts

Source of Funding: | augment base budget, reduce waterworks, reduce paper, reduce time