



**Commission scolaire  
English-Montréal**

---

**English Montreal  
School Board**

# **BUDGET BUILDING PROCESS**

## **FOR 2012-2013**

Version: 2012.01.25

## BUDGET BUILDING PROCESS FOR 2012-2013

### INTRODUCTION

Bill 180, an Act to amend the Education Act and various legislative provisions provides for a division of powers and responsibilities between the Ministry of Education, school boards and educational institutions. This document has been revised to reflect those provisions of Bill 88 which came into force on July 1, 2009.

Under the act:

1. the school board is a legal person established in the public interest whose mission is to ensure that the population in its territory receives the educational services to which it is entitled.
2. an educational institution is not a corporate body. It exercises the powers conferred by law;
3. the school board is the employer of the personnel it requires for its operation and that of its schools and centres;
4. the school board owns its immovables;
5. partnership agreements shall be concluded between school boards and the Minister in order to agree on the measures required to implement the school boards' strategic plans;
6. management and educational success agreements shall be concluded between the school board and each of its educational institutions.

The current budgetary process must reflect these elements. For this reason, this consultation document was prepared to outline the essential elements of the new budgetary approach. It will give those concerned the opportunity to provide input on the budget process. Following the consultation, a budgetary framework will then be set up, including the inherent allocation rules, and will be endorsed by all the parties concerned.

This consultation document sets out the major components of the budgetary process:

1. Budget management philosophy
2. Objectives, Guiding Principles, Criteria and related Orientations
3. Specific context
4. Budget cycle
5. Roles and responsibilities

## BUDGET BUILDING PROCESS FOR 2012-2013

Added to this are the following appendices:

Appendix A: Objectives, Guiding Principles, Criteria and related Orientations proposed for 2012-2013

Appendix B: Questionnaire on the Proposed 2012-2013 Budget Priorities, and Objectives, Guiding Principles, Criteria

Appendix C: Staffing ratios currently in force for various classifications of personnel in schools/centres

### 1. **Budget management philosophy**

The school board adheres to the main principles of the Education Act. Therefore, it focuses on the autonomy, empowerment and accountability of schools and centres while assuming its supervisory role ensuing from its responsibilities.

It strives to **maintain an equitable distribution of resources**, whenever possible, while assuming the supervisory, administrative and support roles toward its schools and centres.

Finally, it seeks to ensure that spending decisions and the distribution of resources facilitate both the *partnership agreements* concluded between the school board and the Minister, and the *management and educational success agreements* concluded between the school board and its schools and centres.

Consequently, the school board adopts a *budgetary approach* that:

- enhances empowerment and accountability;
- takes into account, whenever possible, the characteristics of the communities that it serves;
- fosters the *à priori* allocation of resources;
- is in keeping with the resources available;
- facilitates the attainment of objectives set forth in both the *partnership agreements* and the *management and educational success agreements*;
- maximizes the distribution of resources to educational institutions;
- fosters the communication of the information required for the management of educational institutions.

The school board devises a budgetary process that:

- enables it to assume its role in the distribution of available resources;
- fosters support in carrying out the educational institution's mission;
- ensures the sound management of results.

## BUDGET BUILDING PROCESS FOR 2012-2013

### 2. **Objectives, Guiding Principles, Criteria, and related Orientations proposed for 2012-2013**

The school board must ensure that the *budgetary process*:

- calls on the participation and accountability of school and centre principals, and senior staff of services in the preparation of the budget;
- allows for the evaluation of objectives;
- is designed as an ongoing process where each of the steps is an integral part;
- reflects both the permanent and evolving objectives, guiding principles, criteria and related orientations developed by the board. Those proposed for the 2012-2013 year are reproduced in **Appendix A**.

### 3. **Specific context**

The 2012-2013 process is part of a well-defined context consisting of elements that have a major impact on the possible options:

- the school board must develop its budget process in the context of any *redressment plan* designed to reimburse its accumulated deficit (if applicable) over a reasonable timeframe.

### 4. **Budget Cycle**

In general, the budget cycle consists of four phases:

#### Phase I: Planning (October - April)

This phase consists of the following activities:

- identification of objectives, principles and criteria used to determine the amount allocated (budgetary guidelines);
- definition of needs (including review of service delivery models);
- determination of budgetary rules;
- student forecasts;
- fiscal projections;
- determination of priorities;
- consultation with stakeholders.

## BUDGET BUILDING PROCESS FOR 2012-2013

The following are involved in the development phase:

- Director General;
- Management Table;
- Central Management Advisory Committee
- Council of Commissioners;
- Financial Services department.

The Central Parents' Committee and the Advisory Committee on Services for Handicapped Students and Students with Social Maladjustments or learning disabilities are involved in the consultation phase.

#### 4. **Budget Cycle**

Phase I: Planning (October - April) cont'd

- *Legal framework of the Education Act*

Section 209.1

*For the exercise of its functions and powers, every school board shall adopt a strategic plan covering a period of up to five years stating*

*(1) the context in which it acts, particularly the needs of its schools and centres, and the characteristics and expectations of the community it serves;*

*(2) the main challenges it faces, including success issues, in line with the national indicators established by the Minister pursuant to section 459.1;*

*(3) strategic directions and objectives in line with the directions and objectives of the strategic plan established by the Ministère de l'Éducation, du Loisir et du Sport as well as the other directions, goals or measurable objectives determined by the Minister under section 459.2;*

*(4) the lines of intervention selected for the achievement of the objectives;*

*(5) the results targeted over the period covered by the plan; and*

*(6) methods for assessing the achievement of objectives.*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. Budget Cycle

#### Phase I: Planning (October - April) cont'd

- *Legal framework of the Education Act (cont'd)*

#### Section 459.2

*“The Minister may determine, based on the situation of each school board, the ministerial directions and the goals and measurable objectives it must incorporate into its strategic plan.”*

#### Section 459.3

*“The Minister and the school board, within the scope of a partnership agreement, shall agree on the measures required to implement the school board's strategic plan.*

*The partnership agreement shall include*

*(1) the terms of the school board's contribution toward achieving the goals and measurable objectives determined by the Minister under section 459.2;*

*(2) the means the school board intends to use to achieve the specific objectives it established under subparagraph 3 of the first paragraph of section 209.1;*

*(3) the monitoring and accountability mechanisms to be put in place by the school board.”*

#### Section 209.2

*“Every year, the school board and the principal of each of its educational institutions shall agree, within the scope of a management and educational success agreement, on the measures required to achieve goals and measurable objectives set out in the partnership agreement between the school board and the Minister.*

*A draft of the management and educational success agreement must be submitted to the governing board for approval after consultation with the personnel of the institution.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle**

#### Phase I: Planning (October-April) cont'd

- *Legal framework of the Education Act (cont'd)*

#### *Section 209.2 (cont'd)*

*“The management and educational success agreement shall take into account the institution's success plan and particular situation. It shall include*

*(1) the terms of the institution's contribution;*

*(2) the resources to be allocated by the school board specifically to enable the institution to achieve goals and measurable objectives;*

*(3) the support and assistance measures to be made available to the institution;*

*(4) the monitoring and accountability mechanisms to be put in place by the institution.”*

#### *Section 96.20*

*“After consulting with the school staff, the principal shall inform the school board, on the date and in the form determined by the school board, of the needs of the school in respect of each staff category and of the professional development needs of the staff.”*

#### *Section 96.22*

*“After consulting with the governing board, the principal shall inform the school board of the requirements of the school as regards goods and services, and of any required improvement, equipment, construction, conversion or repair of the premises or immovables placed at the disposal of the school.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle**

#### Phase I: Planning (October-April) cont'd

- *Legal framework of the Education Act (cont'd)*

#### Section 275

*“After consulting with the governing boards and the parents' committee, the school board shall establish objectives and principles governing the allocation of subsidies, school tax proceeds and its other income among its educational institutions.*

*The allocation shall be carried out in an equitable manner and reflect the needs expressed by the institutions and the social and economic disparities with which they must contend, the partnership agreement between the school board and the Minister and the management and educational success agreements between the school board and the institutions.*

*The allocation shall include amounts for the operation of governing boards and amounts to meet the needs of the school board and its committees.*

*The school board shall make public the objectives and principles governing the allocation and the criteria used to determine the amounts allocated.”*

#### Section 96.24

*“The principal shall prepare the annual budget of the school, submit it to the governing board for adoption, administer the budget and render an account thereof to the governing board.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle**

#### Phase I: Planning (October-April) cont'd

*Legal framework of Bill 100 – An Act to implement certain provisions of the Budget Speech of 30 March 2010, reduce the debt and return to a balanced budget in 2013-2014*

#### *Division III*

#### *“Control of Certain expenses and Hiring Limits*

*11. By the end of their fiscal year beginning in 2013, bodies in the health and social services network, bodies in the education network and universities must have reduced their administrative operating expenses by at least 10% in relation to administrative operating expenses incurred during their fiscal year beginning in 2009.*

*12. The management personnel and administrative personnel in bodies in the health and social services network, bodies in the education network and universities must be reduced, giving priority to attrition, to reduce operating expenses. The reduction must continue until the end of the fiscal year beginning in 2013, even if operating expenses have been reduced in accordance with section 11.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle cont'd**

#### Phase II: Preparation (April - June)

This phase consists of the following activities:

- distribution of budgetary envelopes;
- preparation of initial budget by institution and department (including a review of the Organizational Chart).

The same persons are involved in the development phase.

In addition, each governing board participates (consultation, approval and adoption) in preparing the budget of its school or centre.

- *Legal framework of the Education Act*

#### **96.24**

*“The principal shall prepare the annual budget of the school, submit it to the governing board for adoption, administer the budget and render an account thereof to the governing board.*

*The budget must maintain a balance between expenditures, on the one hand, and the financial resources allocated to the school by the school board and the school’s own revenues, on the other.*

*The approved school budget shall constitute separate appropriations within the school board’s budget, and the expenditures for that shall be charged to those appropriations.*

*At the end of every fiscal year, the school's surpluses shall be transferred to the school board. However, the surpluses must be added to the school's appropriations for the following fiscal year if the management and educational success agreement entered into under section 209.2 so provides.*

*If a school closes, the school’s surpluses and funds shall be transferred to the school board.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle cont'd**

- *Legal framework of the Education Act (cont'd)*

#### Section 95

*“The governing board is responsible for adopting the school’s annual budget proposed by the principal, and shall submit the budget to the school board for approval.”*

#### Section 110.13

*“Sections 96.20 to 96.26, except the second paragraph of section 96.21, adapted as required, apply to the principal of a centre.”*

#### Section 276

*“Every school board is responsible for approving the budget of its schools, vocational training centres and adult education centres.*

*The budget of an educational institution shall be without effect until it is approved by the school board. However, the school board may, subject to the conditions it determines, authorize an institution to incur expenses that have not been approved.”*

#### Section 66

*“The governing board shall adopt and oversee the administration of its annual operating budget and render an account thereof to the school board.*

*The budget must maintain a balance between expenditures, on the one hand, and the financial resources allocated to the governing board by the school board, on the other.”*

### Phase III: Decision - making (May - June)

This phase consists of the following activities:

- confirmation of the Organizational Chart
- confirmation of subsidies by MELS;
- local consolidation and necessary adjustments;
- adoption of school or centre budget;
- adoption of school board budget.

The following are involved in this phase:

Adoption:       Governing Boards (school or centre budget)  
                  Council of Commissioners (school board budget)

Approval:       Council of Commissioners (school or centre budget)

- *Legal framework of the Education Act*

#### Section 96.24

*“The principal shall prepare the annual budget of the school, submit it to the governing board for adoption, administer the budget and render an account thereof to the governing board.”*

#### Section 66

*“The governing board shall adopt and oversee the administration of its annual operating budget and render an account thereof to the school board.*

*The budget must maintain a balance between expenditures, on the one hand, and the financial resources allocated to the governing board by the school board, on the other.”*

#### Section 201 (director general)

*“...He is responsible for the day-to-day management of the activities and resources of the school board. He shall see that the decisions of the council of commissioners and of the executive committee are carried out and shall perform the duties that they assign to him.”*

#### Section 277

*“Every school board shall adopt its operating, investment and debt service budget for the following school year and transmit it to the Minister before such date and in such form as he determines.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle cont'd**

#### Phase IV: Management and control (September - June)

This phase consists of the following activities:

- review of student population on September 30, 2012;
- presentation and adoption of the audited 2011-2012 financial statements;
- adjustment of envelopes based on confirmed student population;
- quarterly reviews of budgeted and actual expenses and revenues;
- budgetary transfers required.

All those involved in the development phase are also involved in this phase.

- *Legal framework of the Education Act*

#### Section 96.24

*“The principal shall prepare the annual budget of the school, submit it to the governing board for adoption, administer the budget and render an account thereof to the governing board.”*

#### Section 66

*“The governing board shall adopt and oversee the administration of its annual operating budget and render an account thereof to the school board.*

*The budget must maintain a balance between expenditures, on the one hand, and the financial resources allocated to the governing board by the school board, on the other.”*

#### Section 176.1

*“The members of the council of commissioners shall exercise their functions and powers with a view to improving the educational services provided for by this Act and by the basic school regulations made by the Government. To that end, the role of the members of the council of commissioners includes*

*(3) making sure that the school board's human, material and financial resources are managed effectively and efficiently;”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 4. **Budget Cycle cont'd**

#### Phase IV: Management and control (September - June) cont'd

##### Section 286

*“Once the financial activities have been audited, the director general shall submit the financial statements of the school board and the external auditor’s report to the council of commissioners at its first sitting followed by at least 15 days the date of receipt of the report.”*

##### Section 220

*“Every school board shall prepare an annual report containing a statement of its activities during the school year and a report on the educational and cultural activities of its schools and centres. It shall transmit a copy to those reports to the Minister.*

*It shall also inform the population in its territory of the educational and cultural services it provides and shall give it an account of the quality of such services, of the administration of its school and centres and of the use of its resources.”*

### 5. **ROLES AND RESPONSIBILITIES**

#### **COUNCIL OF COMMISSIONERS**

- Reaches an agreement with the Minister on the measures required to implement the school board’s strategic plan within the scope of a *partnership agreement*;
- With the participation of senior administration, outlines the orientation and priorities of the school board as a whole;
- Ensures that spending orientations facilitate the attainment of objectives set forth in both the *partnership agreements* and the *management and educational success agreements*;

## BUDGET BUILDING PROCESS FOR 2012-2013

### 5. **ROLES AND RESPONSIBILITIES cont'd**

#### **COUNCIL OF COMMISSIONERS (cont'd)**

- Redistributes financial resources as per Article 275 of the Education Act;
- Ensures that financial resources are distributed conforming to school board priorities;
- Approves and adopts initial school board budget and approves budgets submitted by the governing boards of all schools, technical vocational centres and adult education centres;
- Analyzes and adopts revised budget;
- Receives and analyzes the annual financial report as per Article 278 of the Education Act;
- Ensures that the school board's human, material and financial resources are managed effectively and efficiently;
- Reaches any agreement with the Minister on any corrective actions to be put into place to ensure that the goals set out in the partnership agreements between the school board and the Minister are achieved.

#### **DIRECTOR GENERAL**

- Promotes the philosophy of the budgetary process;
- Oversees the development of spending orientations that facilitate the attainment of objectives set forth in both the *partnership agreements* and the *management and educational success agreements*;
- Approves the budget building calendar;
- Ensures the budget is redistributed in an equitable fashion while respecting the orientations and priorities of the school board as per Article 275 of the Education Act;
- Ensures transparency of information;
- Recommends the adoption of the school board budget and governing board budgets;

## BUDGET BUILDING PROCESS FOR 2012-2013

### 5. **ROLES AND RESPONSIBILITIES cont'd**

#### **DIRECTOR GENERAL (cont'd)**

- Studies and submits the year-end financial statements to the Council of Commissioners as per Article 286 of the Education Act;
- Proposes to the Council of Commissioners any corrective actions to be put into place to ensure that the goals set out in the partnership agreements between the school board and the Minister are achieved.

#### **MANAGEMENT TABLE**

- Reports and makes recommendations to the Director General;
- Acts as advisor to the Director General regarding budget orientations and priorities;
- Prepares budget strategies and recommends the budget building calendar;
- Recommends financial resource redistribution in accordance with Article 275 of the Education Act;
- Contributes to the preparation of the draft budget including anticipated revenues and expenses;
- Periodically reviews expenses and revenues in order to update all stakeholders and determine unforeseen variations.

#### **DIRECTOR OF FINANCIAL SERVICES**

- Is responsible for the development and co-ordination of the budget building process;
- Is responsible for the budget planning process including: budget projections, analysis of parameters, consolidation of division budgets, and preparation of summary documentation;
- Acts as resource person for directors with financial queries;
- Provides advice to directors for following respective budgets;
- Receives and analyzes division budgets and recommends approval to the Director General;

## BUDGET BUILDING PROCESS FOR 2012-2013

### 5. **ROLES AND RESPONSIBILITIES (cont'd)**

#### **DIRECTOR OF FINANCIAL SERVICES (cont'd)**

- Follows up and coordinates quarterly updates on budgetary situation;
- Evaluates financial situation and makes recommendations to the Budget Control Committee;
- Proposes parameters and guidelines for equitable distribution of funds with appropriate personnel.

#### **PRINCIPALS (SCHOOLS AND CENTRES)**

- Adhere to school board orientation and priorities;
- Participate in school board budget activities;
- Analyze school/centres' activities and budget requirements;
- Forward to Regional Directors, Director of Human Resources, all professional development, goods, services and capital requirements in accordance with school board orientations and priorities;
- Within the scope of a management and educational success agreement concluded with the school board, annually determine with the board those measures required to achieve goals and measurable objectives set out in the partnership agreement between the school board and the Minister;
- Receive school/centres' budget envelope, prepare distributions of appropriations and submit to governing board for approval;
- Administer budget within parameters while following up with governing board and the Director General.

## BUDGET BUILDING PROCESS FOR 2012-2013

### 5. **ROLES AND RESPONSIBILITIES (cont'd)**

#### **GOVERNING BOARD**

- Advises the principal/centre director on the needs of the school/centre;
- Approves, after consultation with the personnel of the school/centre the *management and educational success agreement*;
- Analyzes and adopts the school/centres' annual budget as per Article 95 of the Education Act,
- The governing board is responsible for administering and accounting for its own budget as per Article 66 of the Education Act.

#### **DIRECTORS OF SERVICE**

- Adhere to school board orientations and priorities;
- Participate in school board activities;
- Analyze services activities and budget requirements;
- Analyze parameters and changes to laws, rules and ententes affecting area of service to determine financial impact;
- Present to management table the staffing, professional development, goods, services and capital requirements in accordance with school board strategic plan, orientations and priorities;
- Prepare budget for area of service based on financial envelope;
- Administer budget within parameters while following up with Director General.

#### **PARENTS' COMMITTEE (CPC)**

- Is consulted on the budget process as per Article 193 of the Education Act,

*“The parents’ committee shall be consulted on...the distribution of educational services among the schools;.....(and) the objectives and principles governing the allocation of subsidies, school tax proceeds and other revenues among its educational institutions as well as the criteria pertaining thereto, and the objectives, principles and criteria used to determine the amount to be withheld by the school board for its needs and those of its committees.”*

## BUDGET BUILDING PROCESS FOR 2012-2013

### 6. **ROLES AND RESPONSIBILITIES cont'd**

#### **PARENTS' COMMITTEE (CPC) cont'd**

- Section 197

*"The parents' committee and the advisory committee on services for handicapped students and students with social maladjustments or learning disabilities shall adopt their annual operating budget, see to its administration and give an account thereof to the school board.*

*The budget shall maintain a balance between the expenditures of each committee on the one hand and the financial resources allocated to each committee by the school board and each committee's own other revenues, on the other."*

#### **ADVISORY COMMITTEE ON SERVICES FOR HANDICAPPED STUDENTS AND STUDENTS WITH SOCIAL MALADJUSTMENTS OR LEARNING DISABILITIES. (ACSES)**

- Section 187

*"The function of the advisory committee on services for handicapped students and students with social maladjustments or learning disabilities are:  
1) to advise the school board on a policy for the organization of educational services to handicapped students and students with social maladjustments or learning disabilities; and, 2) to advise the school board on the allocation of financial resources to the services intended for those students...."*

- Section 187.1

*"Each year the school board shall inform the advisory committee on services for handicapped students and students with social maladjustments or learning disabilities of the amount of financial resources intended for those students and the allocation of those resources in light of the policies defined by the Minister."*

## BUDGET BUILDING PROCESS FOR 2012-2013

### **APPENDIX A: Objectives, Guiding Principles, Criteria, and related Orientations proposed for 2012-2013**

#### **Objectives:**

1. To achieve a balanced budget while maintaining the integrity of educational services at the school and center level as established by the Ministry of Education.
2. To support the vision established within the Board's mission statement given the available budgetary parameters and in compliance with the specific spending targets adopted by the Board.
3. **To ensure that spending decisions and the distribution of resources are both in conformity with the Board's Strategic Plan and facilitate both the partnership agreements concluded between the school board and the Minister, and the management and educational success agreements concluded between the school board and its schools and centres.**
4. To maintain those services at the Administration Building level essential to both support the implementation of the Curriculum and to adequately respond to educational and administrative responsibilities as mandated for the Board.
5. To address, where applicable, the Board's Redressement Plan within the context of the Board's Strategic Plan.

#### **Guiding Principles, Criteria, and related Orientations:**

- i) The Council and Administration will continue to inform and pressure the Ministry of Education, Recreation and Sports to redress funding shortfalls to which the EMSB has been subjected.
- ii) The spending inefficiencies implicit in operating sub optimally-occupied facilities will be addressed by the rationalization of the Board's network of schools and, if required, by system-wide (i.e. Administration Building and schools and centres) spending reductions.

## BUDGET BUILDING PROCESS FOR 2012-2013

### **APPENDIX A: Objectives, Guiding Principles, Criteria, and related Orientations proposed for 2012-2013 (cont'd)**

#### **Guiding Principles, Criteria, and related Orientations:** (cont'd)

- iii) *Administration Building departments* will continue to review services and restructure processes in order to maximize efficiencies and, if applicable, to meet, on an overall basis, the spending targets.
- iv) The Board recognizes the growing challenges faced by schools in respecting their per capita allocations, and shall therefore review such allocations with a view to maintaining or possibly increasing these grants, subject to the Board's financial framework.
- v) Within the approval process for capital expenditures, priority shall be given to those projects giving rise to a material reduction in operating expenses.
- vi) Staffing ratios for school and centre-based staff will be reviewed annually and be readjusted where deemed necessary, in keeping with the Board's Strategic Plan. (Appendix C – Staffing ratios currently in force for various classifications of personnel in schools/centres)
- vii) All allocations to schools and centres that are governed by specific life-spans and purposes must be spent within these parameters, and integrated in the context of school success plans. **Unspent balances at year-end in these budgets will not necessarily be added to the school's or centre's appropriations for the following school year- unless its management and educational success agreement so provides.**
- viii) Schools and centres will be permitted, subject to established guidelines, to reserve-with Governing Board approval- portions of locally-administered funds in order to augment local staffing.
- ix) The Board recognizes the need to reinvest net revenues generated by vocational and adult education centres -thereby enabling this sector to strategically invest in improving service delivery.
- x) Upon the adoption of department or unit-specific spending reductions, the integrity of those reductions remains constant until the following year's budget orientations are developed.
- xi) The Board shall ensure that equitable compensation is received from municipalities and other organizations using its facilities such that operating costs are adequately covered.
- xii) The Board shall ensure that unanticipated surpluses deriving from corporate operations of the preceding year shall be reviewed for the purpose of reserving and allocating funds for specific, non-recurring spending. Where feasible, preference shall be given to initiatives of a capital expenditure nature.

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX B: SUGGESTIONS FOR BUDGET PRIORITIES  
FEEDBACK ON GUIDING PRINCIPLES,  
CRITERIA, AND RELATED ORIENTATIONS**

Page 1 of 2

Group/School/Centre: \_\_\_\_\_

**1. Budget Priorities:**

Within the context of declining enrolment-and therefore decreasing subsidies-establishing budget priorities can realistically imply that these priorities *could* simply be exempted from reductions. In this light, please list, in order of priority, the needs among the schools/centres which you feel are most important:

1.	_____
2.	_____
3.	_____
4.	_____
5.	_____
(please use another sheet if this space is insufficient)	

Please note this list is part of the overall budget planning process. As the MELS funding parameters become known, some funds may have to be directed to specific spending initiatives per Ministry requirements.

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX B: SUGGESTIONS FOR BUDGET PRIORITIES  
FEEDBACK ON GUIDING PRINCIPLES,  
CRITERIA, AND RELATED ORIENTATIONS**

Page 2 of 2

Group/ School/Centre: \_\_\_\_\_

**2. GUIDING PRINCIPLES, CRITERIA, AND RELATED ORIENTATIONS**

Please provide your comments on the *Guiding Principles, Criteria, and related Orientations* as outlined in the attached document. You may use the reference numbers i) to xii) used in the document.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(please use another sheet if this space is insufficient)

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX C: STAFFING RATIOS CURRENTLY IN FORCE  
FOR VARIOUS CLASSIFICATIONS OF  
PERSONNEL IN SCHOOLS/CENTRES**

Page 1 of 5

The following ratios are applied with flexibility in cases where student enrolment is marginally below each allocation strata:

School Secretaries – Elementary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation*
0 – 400	1.00
401 – 550	1.50
551 – 700	2.00
More than 701	2.50

\* Represents Full Time Equivalent Allocation

School Secretaries – Secondary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 300	1.00
301 – 550	2.00
551 – 700	2.50
701 – 850	3.00
More than 851	3.50

School Secretaries – Social Affairs Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 400	1.00

School Organization Technicians – Secondary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 300	0.30
301 – 450	0.50
451 – 600	0.60
601 – 750	0.80
More than 751	1.00

Laboratory Technicians – Secondary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 400	0.50
401 – 800	1.00
More than 801	1.50

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX C: STAFFING RATIOS CURRENTLY IN FORCE  
FOR VARIOUS CLASSIFICATIONS OF  
PERSONNEL IN SCHOOLS/CENTRES (cont'd)**

Page 2 of 5

Documentation Technicians – Elementary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 200	0.20
201 – 400	0.30
401 – 550	0.40
More than 551	0.50

Documentation Technicians – Secondary Schools:

Criteria for allocation:

Estimated Student Enrolment	FTE Allocation
0 – 250	0.30
251 – 500	0.60
501 – 1000	1.00
More than 1001	1.20

Caretakers and Maintenance Workers:

Criteria for allocation:

- Estimated student enrolment
- Square meters, age and condition of the building
- G.E.S. Technologies recommendations in accordance with their PROPRES program
- Total school usage such as daycare, rentals (outside organizations), after school programs, etc.

Guidance Counsellors:

Ratio of guidance counsellor to students – 1:600 (Approx.) \*1

Criteria for allocation:

- Estimated student enrolment
- Special education student enrolment
- Projected secondary 4-5 enrolment
- Inner-City index
- Specific school needs (e.g. John Grant: ratio – 1:140)

Other considerations:

- Input from school principals and regional directors
- Input from the Allocation of Resources Committee (“ARC”)
- Regionalization

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX C: STAFFING RATIOS CURRENTLY IN FORCE  
FOR VARIOUS CLASSIFICATIONS OF  
PERSONNEL IN SCHOOLS/CENTRES (cont'd)**

Page 3 of 5

Psychologists:

Ratio of psychologist to students – 1:1150 (Approx.) \*1

Criteria for allocation:

- School population
- Special education enrolment
- Inner-City Index
- Specific school needs (e.g. presence of autistic class)
- Number of schools

Other considerations:

- Feedback from ARC
- Input from principals and regional directors
- Regionalization

Speech-Language Pathologists

Ratio of speech-language pathologist to students – 1:1100 (Approx.) \*1

Criteria for allocation:

- School population
- Special education enrolment
- Inner-City Index
- Specific school needs (e.g. presence of language class)
- Number of schools

Other considerations:

- Feedback from ARC
- Input from principals and regional directors
- Regionalization

Child Care Workers (CCW's)

Criteria for allocation: case-by-case basis (refer to page 5 in Appendix C)

Clustering of students is often considered to maximize deployment of CCW services  
Many hours of time are expended in carefully scrutinizing CCW services to meet  
student needs in consultation with in-school personnel, parents, professionals, etc.

Special Education Consultants

Criteria for allocation:

- Three (3) special education consultants are regionalized
- One (1) special education consultant is assigned to the three (3) special education schools (i.e. John Grant, Paul VI, and St. Raphael), Outreach Schools, Hors-Reseau Schools, and Social Affairs Schools

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX C: STAFFING RATIOS CURRENTLY IN FORCE  
FOR VARIOUS CLASSIFICATIONS OF  
PERSONNEL IN SCHOOLS/CENTRES (cont'd)**

Page 4 of 5

Occupational Therapists

Criteria for allocation:

- Regionalized

Spiritual Community Animators

Ratio of spiritual community animator to students – 1:1400 (Approx.) \*1

Criteria for allocation:

- School population
- Special education enrolment
- Number of schools
- Link between elementary feeder schools and high schools

Other considerations:

- Input from principals and regional directors
- Regionalization

**\*1 Ratio for each professional (i.e. guidance counsellors, psychologists, speech-language pathologists, and spiritual animators) will vary depending on the specific criteria indicated (e.g. the ratio for one psychologist is 1:825 whereas another is 1:1440)**

BUDGET BUILDING PROCESS  
FOR 2012-2013

**APPENDIX C: STAFFING RATIOS CURRENTLY IN FORCE FOR VARIOUS CLASSIFICATIONS OF PERSONNEL IN SCHOOLS/CENTRES (cont'd)**

Page 5 of 5

**Child Care Worker (CCW)**

**1. Criteria for Assigned Hours**

- Identified on a case-by-case basis by examining the following factors:
  - diagnosis
  - nature of behaviour problems (if applicable)
  - level of communication skills
  - level of self-care skills (e.g. toileting, feeding, etc.)
  - level of autonomy (e.g. within the classroom, at lunchtime, at recess, etc.)
  - safety issues (e.g. self control, possible runner, etc.)
  - medical/physical problems
  - gross motor/fine motor skills
  - intellectual abilities
  - nature of social interaction with others
  - organizational skills
  - nature of psychiatric difficulties (if applicable)
- A full-time CCW (i.e. 26.25 hours or more per week) will only be assigned in very extenuating circumstances (e.g. severe medical problem).

**2. Criteria for Assignments of Technicians and Attendants\***

- **Codes 23, 24, 33, 36, 42, and 44** are usually serviced by an **attendant**.
- **Codes 12, 14, and 71** are usually serviced by a **technician**.
- **Codes 50 and 99** may be serviced by an **attendant** or **technician** depending on the nature and severity of the case in question.
- **Code 34** students are serviced only in extenuating circumstances by a technician (e.g. with accompanying behavioural and/or social difficulties).
- **Code 53** students may be serviced by a CCW, where applicable.

\* Students with the above designated codes are not guaranteed CCW services as they may not necessarily require such services. As well, non-coded students with minor behaviour difficulties may receive the services of a currently existing technician, where applicable.

**3. Criteria for the Number of CCW's Assigned to a School**

- The feasibility of **clustering** students in the **same class** who are in the same grade with similar disabilities and/or handicaps.
- The feasibility of **clustering** students (from different schools) with CCW needs in the **same school** (e.g. those students with severe handicaps - e.g. very low functioning autistic students).
- The feasibility of newly identified students being serviced by the CCW(s) currently assigned to the school in question.