

# Research

## R E P O R T

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# Responding to Diversity: Examining Education Equity in Saskatchewan

By Lorraine Thompson

This resource was commissioned by the Education Equity Working Advisory Group of the Saskatchewan School Boards Association.

The Education Equity Working Advisory Group was established by the Executive of the Saskatchewan School Boards Association in April 2010 to assist boards of education to define and assess education equity.

## **Acknowledgements**

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*Note: The term “board of education” used in this document refers both to Saskatchewan’s boards of education and to the Conseil des écoles fransaskoises. The simplified term is used to reduce wordiness in this document.*



# Introduction

## Purpose of This Document

This document has been produced by the Education Equity Working Advisory Group of the Saskatchewan School Boards Association.

Boards of education are concerned about fairness in education funding, especially since the provincial government assumed responsibility for funding K-12 education in 2009.

This document is a first step by the Education Equity Working Advisory Group toward the fulfillment of its mandate.

## Role of Other Working Advisory Groups

This document and other work done by the Education Equity Working Advisory Group is designed to supplement and complement the work of other Working Advisory Groups established by the Saskatchewan School Boards Association, for example, the Education Finance Working Advisory Group and the Capital Funding Working Advisory Group. More information about the work of these other Working Advisory Groups appears in Appendices A and B at the end of this document.

## Responding to the Questions in This Document

Section 7 of this document includes nine discussion questions. These questions are provided for thought and reflection. Some boards of education may wish to discuss these questions at a board meeting or respond to them in writing. If your board chooses this approach, select two or three key questions to focus on as a board and leave the rest of the questions for individual reflection.

## The Education Equity Working Advisory Group

The Education Equity Working Advisory Group is made up of elected board of education members and senior board of education staff. The members are:

### Co-Chairs

- Scott Sander – Sun West SD
- Eldon Van Den Bossche – Horizon SD

### Members

- Larry Ahenakew – Northern Lights SD
- Marc Danylchuk – Horizon SD
- Cindy Anderson – Regina Public SD
- Bernie Girardin – Prairie South SD
- Debra Burnett – Regina Public SD
- Ben Grebinski – Prairie Valley SD
- Bert Provost – Prince Albert Catholic SD
- Lisa Lambert – Greater Saskatoon Catholic SD
- Janet Kotylak – Prairie Valley SD

## What is Education Equity?

The question “What is fair?” helps to define education equity. Fairness and justice for all people, taking into account each individual or group’s unique circumstances, is at the heart of equity.<sup>11</sup> Why do we seek equity? On a fundamental level our quest for equity in education arises out of our innate sense of fair play, a sense of a natural law that tells us all members of a society are of equal value before the law, and should have equal access to the benefits of that society.<sup>22</sup>

Equity is important for both students and boards of education.

*For students, equity goes beyond providing all students with the same opportunities. Equity means ensuring that students who experience barriers to learning have the supports they need to achieve the same benefits and successes as all other students. Equity is about outcomes, results, and opportunities.*

*For boards of education, education equity means equity of resources. Education equity means funding models that recognize it costs more to deliver the K-12 education program in some situations than in others and provide appropriate and adequate dollars so all boards of education can offer a comparable, equitable, high-quality program to their students.*

These two perspectives on education equity are closely linked. In order to create programs that result in equity of opportunity and of outcomes for all students, boards of education need equitable funding models that provide greater funding when students and areas of the province have greater need.

1 *Our Children, Our Communities and Our Future: Equity in Education.* (1997). Saskatchewan Ministry of Education.

2 Reimer, A. (2005). *Equity in Public Education.* Manitoba Association of School Superintendents.

# Saskatchewan's Boards of Education

Saskatchewan's boards of education have one important similarity and, at the same time, many differences. All boards share a commitment to their students, but they experience varying circumstances which mean that boards will take different paths as they act on their commitment to students.

## Saskatchewan's Boards of Education – Shared Values

What all Saskatchewan boards of education have in common is their commitment to their students – their desire to do the very best for every student in their care. All boards of education are focused on providing equity of opportunity and of outcomes for their students regardless of students' individual or family circumstances.

Saskatchewan boards of education recognize that some students need additional or specialized programming to achieve at high levels. They recognize, for example, that:

- Many First Nations and Métis children encounter a world with racism and social and economic inequities – the result of colonization. Colonization is the exercise of political, economic and/or military power by one group of people over another and the assumption that the worldview of the colonizer is superior to that of the colonized people. With colonization of the prairies, First Nations people lost their land and livelihood. With establishment of residential schools, First Nations children were taught to reject their culture and the bonds that held families and communities together were weakened.
- For some students English is an additional language. These students include immigrant and refugee children as well as some Hutterite and First Nations children born right here in Saskatchewan.
- Students who live with poverty may experience many barriers that make learning difficult. The direct consequences of poverty include hunger, poor housing, unsafe neighbourhoods, and health issues. The indirect consequences include family stress, feelings of inferiority, a sense of hopelessness, and social stigma.
- Some students have exceptional and/or intensive learning or behavioural needs. These include students with physical and intellectual disabilities and students whose behaviour makes it difficult for them to function in the regular classroom.

## Saskatchewan's Boards of Education – Differing Circumstances

Saskatchewan's boards of education have different circumstances and situations that must be recognized and accommodated within an equitable funding model.

Some of the ways that Saskatchewan boards of education differ include:

- **Different students** – The student body varies from one school division to another. In the North, the majority of students are First Nations and Métis. Several of Saskatchewan's cities and rural school divisions also have a large proportion of First Nations and Métis students. The North has a high poverty rate in most areas. Some urban and rural school divisions have a full range of economic situations – middle class neighbourhoods, neighbourhoods of extreme poverty, and also very high income neighbourhoods.

Regina and Saskatoon have a disproportionate number of students with exceptional needs – students with autism or who are medically fragile, for example – because their families move to the city to access services. In 2008-09, about 44 percent of the provincially-identified students with intensive needs attended school in Regina or Saskatoon.

The two large cities also have a disproportionate number of English as an Additional Language Students. However, Saskatchewan's immigration levels have increased significantly in recent years and EAL students can now be found in most Saskatchewan school divisions, sometimes concentrated in a community where a local industry has assisted the immigration of overseas workers.

- **Different geographic locations** – A school division's location affects costs for almost everything and also influences its ability to provide programs and services to its students. In the North, for example, taking students to another community for intermural sports may involve a day-long bus trip and an overnight stay. Distances in the North mean that everything from gas, to cleaning supplies, to licensed tradespeople, is harder and more expensive to get. The North also has challenges attracting and retaining teachers.

Distances are an issue for many rural school divisions as well. For example, an itinerant specialist, such as speech-language pathologists, may spend as much as 30 percent of their time travelling from school to school. Thus, a rural school division may need 1.3 or 1.4 speech-language pathologists to offer a level of service comparable to the city where these specialists spend little or no time travelling.

The "law of reversal" is sometimes cited when describing the effect of geography on equity. Costs are highest and services lowest in the areas of greatest need. Small and isolated communities with the least capacity, lowest socioeconomic conditions, highest nutrition costs and least connectivity, have the lowest capacity, the least access to professional services and supports, and the highest costs for goods and services.

Saskatchewan's Conseil des écoles fransaskoises faces a unique geographic challenge in that it covers the entire province (except for the North). Its 14 schools are located in 12 different communities.

- **Different infrastructure within school divisions** – School divisions created through restructuring are still struggling to equalize the quality of school buildings and technology so that all parts of the division have comparable services. This includes the 11 school divisions created on January 1, 2006 through legislation, as well as other voluntary amalgamations before and after that date. The infrastructure of the legacy school divisions that existed prior to restructuring may have differed greatly, with some having sophisticated technology and/or newer buildings, and others having limited technology and/or older buildings. As a result, some of the new, larger school divisions are challenged by the need to maintain an existing high quality infrastructure in one corner of the division, while at the same time upgrading or replacing aging infrastructure in another corner.

This situation is not limited only to school divisions affected by amalgamation. Infrastructure disparities also exist within some school divisions that have not been involved in amalgamation. Some of these school divisions are also struggling to bring facilities in all parts of the division up to the same quality standards.

The status of a school division's infrastructure affects operating budgets as well as capital budgets. Older school buildings usually cost more to heat and require more maintenance than do newer schools.

- **Different mandates** – All of Saskatchewan's boards of education and individual schools are committed to delivering a quality education program as defined by the curriculum, but the context within which they deliver the educational program sometimes differs, for example:
  - The Conseil des écoles francsaskoises has a triple mandate: academic, cultural and community. This mandate was established as a result of the constitutional guarantee in Section 23 of The Charter of Rights and Freedoms. The cultural, linguistic and community aspects of the mandate are in addition to the mandates of other boards of education.
  - Saskatchewan's Catholic boards of education are committed to nurturing faith as they provide a quality education.
  - Saskatchewan's public boards of education provide services to all children regardless of religion or language. The requirement to be inclusive of all children presents challenges and issues for public boards that differ from Catholic boards of education or the conseil des écoles francsaskoises.
- **Different collective bargaining environments** – All of Saskatchewan's boards of education are bound by the provincial collective bargaining agreement and all negotiate local LINC (Local Implementation and Negotiation Committee) agreements. However, the unions that represent support staff vary from one board of education to another. At least one board of education negotiates agreements with five different unions.

# Saskatchewan's Boards of Education

## Education Equity – A Shared Responsibility

Education equity for both students and boards of education is a fundamental principle of public education. Equity is an important part of the foundation upon which our public education system rests. Every organization and every individual within the education system has a responsibility to work toward education equity.

- **Provincial government** – The provincial government has a responsibility to consider how its actions affect equity. Curriculum, educational programming, operational and capital funding formulas all can have an impact on equity. The provincial government also has a responsibility to educate the public and the education system about the importance of equity and about programming and budgetary measures that enhance equity.
- **Boards of education** – Boards of education have a responsibility to use the dollars available to them in ways that enhance equity for students and that promote equity of programming, technology and facilities across the school division.
- **SSBA** – The Saskatchewan School Board Association has a responsibility to educate boards of education about equity, and to support boards of education in speaking with one voice on equity and other matters.

Achieving equity for both students and boards of education will require collective and coordinated action by government, boards of education and other members of the education community. No single agency can do it alone.

## Education Equity for Students

We will know that we are moving closer to achieving education equity for all students when we have:

- **Comparable graduation rates** – Equity means that graduation rates and achievement levels for First Nations and Métis students, students who live with poverty, and students for whom English is an Additional Language are comparable to those of the general population.
- **Comparable opportunities regardless of where students live** – Equity means that students who live in remote areas such as the North and some rural areas have access to educational opportunities that are comparable to (although not necessarily the same as) students who live in urban areas.
- **Adequate instructional resources** – Equity means that every student in every school in Saskatchewan has access to instructional resources (e.g., textbooks, reference books, online resources, DVDs, etc.) that are adequate in number and quality to support their instructional program.
- **Inclusive activities** – Equity means that no students are left out of school sports activities, extracurricular activities, field trips, or cultural activities because of family circumstances.

- **Comparable access to specialists** – Equity means that all students, no matter where they live in Saskatchewan, have comparable access to specialist educators such as speech-language pathologists, educational psychologists and the like.
- **Consistent teaching staffs** – Equity means that all Saskatchewan students experience a stable, consistent teaching staff in their school. It means that the turnover of teachers, educational administrators and educational specialists in rural areas and the North is comparable to the turnover in the province as a whole.

## Education Equity for Boards of Education

We will know that we are moving closer to achieving education equity for boards of education when we have:

- **Equitable funding** – Equity means that operational funding formulas recognize that equitable does not mean equal and that funding formulas provide additional resources when a board of education's particular circumstances require greater expenditures to create opportunities and student outcomes comparable to those in the rest of the province. We recognize that spending the same amount of money on each child will not lead to equitable results. Equity of results can only be achieved when there is equity of resources – providing more money for students who have the greatest need.
- **Comparable LINC Agreement costs** – Saskatchewan has a bi-level process for teacher collective bargaining, with some items being negotiated at the provincial level and some at the local school board level. Section 237 of The Education Act specifies the items that are mandatory for negotiations at each level. In recent years the scope of bargaining has expanded beyond the mandatory items listed in The Education Act. Equity means that the costs of LINC (Local Implementation and Negotiation Committee) Agreements are comparable for all school boards in Saskatchewan. It does not mean that the terms of all LINC Agreements are the same. Individual boards of education are best able to identify priorities within their own school divisions.
- **Comparable and suitable school facilities** – Equity means that the quality of school facilities is comparable across the province and comparable from one part of a school division to another. Quality refers to the suitability of school facilities, to school building construction and to the ongoing upkeep and maintenance of school facilities. A full assessment of infrastructure requirements takes into account the functionality and safety of the building, projected enrollments, suitability for current and future program delivery, aesthetics, and place in the community.
- **Equitable provisions for governance** – Equity means funding formulas that recognize it costs more to conduct the business of the board of education and school community councils in rural and northern areas than in urban areas. For example, a rural board member may have to drive two hours to attend a board meeting. A northern board member or school community council member may have to drive a whole day and stay overnight. The members of the Conseil des écoles fransaskoises live all over Saskatchewan and, no matter where board meetings are held, some members must drive long distances.

- **Equitable provision for transportation** – Equity means funding formulas that recognize transportation costs are higher in remote, rural and northern areas than in other areas of the province. The cost of transporting students to and from school, to other schools for sports events, and into the community for educational experiences isn't equal in all parts of Saskatchewan. Distances are greater and the cost of gas, oil and vehicle maintenance are higher in the North than in other areas of the province.
- **Transparency in funding** – Equity means there is complete transparency in funding in order to monitor progress toward education equity, and that no side deals are negotiated with individual boards of education. All boards of education want to be treated fairly according to the same set of principles. The principle of transparency has three implications:
  1. The funding formulas used by the provincial government to allocate operating and capital funds to boards of education are clearly defined and published on the Ministry of Education website, so these formulas are known to all.
  2. All school board budgets – both funds received and funds spent – are published on the Ministry of Education website so the budgeting process is entirely transparent.
  3. All budget income and expenses are coded in the same way – That is, apples are coded with other apples and oranges are coded with other oranges, so accurate financial comparisons can be made among boards of education.

## Board of Education Decision Making

Board of education autonomy is an important dimension of education equity. Each board has a thorough understanding of its own students and local priorities. Local autonomy means that boards of education spend the funds available to them in ways that best enhance equity of opportunity to learn and equity of results for all students. This will vary from one board of education to another because each board's circumstances and situation is different.

### Promoting Education Equity

In order to promote education equity for all students, boards of education will make decisions about:

- **Educational programs** – The characteristics of the student body and local priorities will determine the programs offered by boards of education in order to achieve the outcomes prescribed in the curriculum. How can middle years and high school students in small schools have access to the same range of options as students in large schools? Is English as an Additional Language programming needed? Do some students need tutoring in order to catch up to their grade level? How can schools be made welcoming to First Nations and Métis students? All of these program decisions relate to education equity. All have financial implications.
- **The terms of the LINC Agreement** – The LINC Agreements negotiated by individual school boards cover teacher preparation time, sabbatical and educational leave, special allowances for teachers and other matters relevant to employment. Boards can negotiate LINC Agreements that promote education equity for students. For example, some boards will negotiate additional teacher preparation time, so teachers have time to do individualized planning in order to respond to the needs of specific students. Other boards will negotiate funded educational leave to encourage teachers to upgrade their education and become specialists to work with certain groups of students or teach specialized subjects. Both approaches are ways of improving program quality. Both have financial implications.

The terms of the LINC Agreement can be one of the factors that make a school division an attractive place to work. Thus, it helps with recruitment and retention of teachers. The terms of the LINC Agreement can help create a more positive work environment, which in turn makes for a positive classroom environment that fosters success for all students.

- **Staffing models and ratios** – Most boards of education establish staffing models that define class size at various grade levels, the ratio among teachers/educational assistants/head office consultants, principal and vice-principal administrative time, and similar matters. Boards of education can use the staffing model to promote education equity by, for example, providing smaller class sizes for schools in lower socioeconomic neighbourhoods or by ensuring that students in small or remote schools have access to the same specialist services as students in large schools. Staffing models are also financial models, because the number and type of school division staff affect the board's bottom line.

- **Community engagement** – Every board of education will develop its own unique plan for involving parents and community in the life of the school, ensuring that the school program reflects community priorities and promotes opportunity to learn for all students. School community councils will be part of this plan, but so will many other initiatives. These initiatives may involve outreach to families, using the school as a location for community activities, and programs to make the school more welcoming.

Research shows that parents' involvement in their children's education is a strong predictor of student success. Yet some families may not see the school as a welcoming place. First Nations and Métis families may remember the residential schools, and immigrant and refugee families may think of schools as they were in the home country – where there was a sharp division between school and home. Strong community engagement programs can demonstrate to families that the school welcomes their involvement in their children's education and thus promote equity of opportunity for all students.

- **The annual schedule for the school division** – *The Education Act, 1995* sets the school year at 200 days or a lesser number of days as determined by the Minister of Education. In recent years, the school year has been 197 days. Within this context, boards of education organize the school year in ways that will best promote a quality education program and equity of opportunity and of outcomes for students. Elements that boards of education consider when approving the annual schedule include instructional days for students, teacher in-service days, semester turnaround days, parent/teacher interview days, and early dismissal days.
- **Education facilities** – Boards of education must be in a position to assess need within their school division and allocate capital expenditures and funds for maintenance so boards can maintain suitable facilities and fulfill their mandate to deliver quality education. Boards of education are in the best position to determine local facility needs and establish priorities.

As boards of education establish priorities, they need to consider the interconnectedness of decisions. For example:

- **Program decisions** – Boards need to make decisions about which course offerings will be provided, in which buildings, in which communities. They need to determine which initiatives will best strengthen student learning outcomes and opportunities and consider the most effective way of engaging the community in program decisions. All of these aspects of programming and planning are interconnected.
- **Teacher preparation time/class size** – It is common for boards of education to balance teacher preparation time and class size, with emphasis being placed on one or the other depending on local priorities. One board may provide 20 percent teacher preparation time, but larger class size. Another board may provide 10 percent preparation time, but smaller class size. Yet another board, which has several small schools, may hire additional teachers, in order to reduce multigrading or class size, or increase teacher preparation time within those small schools.
- **Teacher preparation time/semester turnaround days** – Another common balancing act is between teacher preparation time and semester turnaround days when teachers, but not students, are at school. Providing teacher preparation time and establishing semester turnaround days are two approaches that provide teachers with time to plan; the scheduling is just different.

## SSBA Action

The Saskatchewan School Boards Association, along with other Saskatchewan educational organizations, has a responsibility to promote education equity. The Education Equity Working Advisory Group recommends that the Saskatchewan School Boards Association take the following actions to enhance education equity in this province.

- **Advocate for boards of education** – The SSBA can strongly advocate for boards of education on matters of education finance, actively promote funding models that boards of education believe will best strengthen equity, work with Ministry of Education officials to develop appropriate funding models, and respond to proposals put forward by the provincial government.
- **Exercise strong leadership** – The SSBA can lead processes that enable all Saskatchewan boards of education to speak with a united voice on financial matters. Processes that bring representatives of boards of education together to share experiences and work together on common tasks give them a deeper understanding of each other’s situations and strengthen their ability to speak with a united voice on important issues such as education finance. The Working Advisory Group structure is one example of an active process that promotes unity to achieve these ends.
- **Monitor educational equity in Saskatchewan** – Initiatives that will support monitoring of education equity include publication of funding formulas and board of education budgets, and consistent coding of budget categories. The SSBA can monitor to ensure these initiatives are implemented and can work toward development of further monitoring processes. The SSBA can also help identify side deals that challenge education equity.
- **Support school division data collection** – Some school division funding will be based on, for example, the number of First Nations and Métis students or the number of English as an Additional Language students in a school division. The Saskatchewan School Boards Association can work with Ministry of Education officials and school divisions to establish procedures for determining these numbers. Self-identification, identification by school staff, Statistics Canada data, or some other method could be used to identify these categories of students. The Saskatchewan School Boards Association can also assist school boards to collect the data they need to support applications for funding.

- **Provide leadership for accountability** – Financial accountability is increased and monitoring of education equity is improved when boards of education report data and information in the same way, using the same format, so comparability is easier. The Ministry of Education’s Continuous Improvement Framework might be a starting point for consistency of reporting. The Saskatchewan School Boards Association can take the initiative, by working with boards of education and school division officials to determine:
  - The format that should be used for a school division’s strategic plan and annual report
  - The data that should go into a strategic plan and an annual report.
- **Work to identify “best practices”** – The Saskatchewan School Boards Association can work with boards of education to identify “best practices” in the distribution of resources to support quality education for PreK-12 students. Boards of education can compare themselves to other boards with similar characteristics and learn from the successes of others. The Saskatchewan School Boards Association can identify practices which reduce the impact of barriers to achievement such as poverty, ethnicity and gender.

## For Discussion

The questions below are provided for thought and reflection. Some boards of education may wish to discuss these questions at a board meeting or respond to them in writing. If your board chooses this approach, select two or three key questions to focus on as a board and leave the rest of the questions for individual reflection. The questions that are most suitable for board discussion are #4 which addresses accountability, #5 which addresses transparency, and #9 which looks to the future.

### What is Education Equity?

1. What does education equity mean to you?

### Saskatchewan's Boards of Education

2. How is your board of education similar to other boards of education?
3. How is your board of education different from other boards of education?

### Achieving Education Equity

4. Most boards of education advocate for unconditional operational funding – funding with no strings attached. Yet, at the same time, there is a desire for accountability to ensure, for example, that money a board of education receives for special needs students is actually spent on programming for those students. How can these two seemingly contradictory priorities be reconciled?
5. Total transparency will be an important step toward the monitoring of education equity in Saskatchewan. Transparency includes publication of funding formulas and board of education budgets, and comparable coding of budget categories. Are there other steps that can be taken to monitor or measure education equity in this province?



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## Appendix A: Education Finance Principles

The education finance principles which follow were developed by the Saskatchewan School Boards Association's Education Funding Working Advisory Group in 2009.

The members of this group were:

### Chair

- Dan Danielson – Saskatoon Public SD

### Vice-Chair

- Simone Couture – Conseil scolaire francosaskois

### Members

- |                                                      |                                                    |
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| • Ralph Pilz – Northern Lights SD                    | • Rob Currie – Regina Catholic SD                  |
| • Shirley Owen – Creighton SD                        | • Ron Ford – Living Sky SD                         |
| • Rod Luhnning – Prairie Valley SD                   |                                                    |

The education finance principles below are intended to provide a framework for the fiscal relationship between Saskatchewan boards of education and the provincial government. These principles are important to boards of education. They serve as a framework for discussions between elected boards of education and the provincial government and provide a context for decision making and action. These principles apply to capital funding as well as to operational funding, because both types of funding have an impact on student achievement.

These principles of education finance are all focused on the same end – realizing Saskatchewan's Goals of Education, developing the potential of all students, affirming the worth of each individual, and laying the foundation for learning throughout life. Saskatchewan's elected boards of education believe that educational goals and priorities should drive all decisions about educational finance.

The nine fundamental principles of education finance are:

- Adequacy
- Autonomy
- Balance
- Equity
- Involvement
- Predictability
- Reciprocal Accountability
- Sustainability
- Transparency

Each principle is important in its own right, but is also interrelated with and interdependent on the other principles (Nova Scotia Regional Schools Boards, 2004). All principles are of equal importance and all have equal relevance to education finance in Saskatchewan.

The Saskatchewan School Boards Association has incorporated these principles into the way it does business. They have been shared with the Minister of Education and the Minister of Finance, and the Saskatchewan School Boards Association expects they will be reflected in funding models.

## **Adequacy**

### **Definition**

- as much as is needed; fully sufficient
- suitable (Gage Canadian Dictionary, 1983)

### **Description**

The amount of funding that is provided to elected boards of education by the provincial government must be adequate to respond to provincial goals and priorities, to provide a high quality core program to all students, and to accommodate local innovation and initiatives. It must be adequate to meet the expectations that parents and community members have for the education of their children. Funding must also recognize the actual cost of education which includes not only program costs but also transportation costs, technology costs and the cost of maintaining, upgrading or replacing aging facilities.

Adequacy will differ from one school division to another because of geographic, student and cultural diversity. It is a provincial government responsibility to define and fund core educational programs. In addition, it is a provincial government responsibility to fund local needs and priorities as identified by locally-elected boards of education.

It is a provincial government responsibility to establish an audit function to ensure that similar expenses are described and coded in the same way by every school board and thus facilitate consistency and comparability across the province.

## Autonomy

### Definition

- self-government; independence
- a self-governing community (Gage Canadian Dictionary, 1983)

### Description

Boards of education derive their authority from The Education Act, 1995 which gives boards of education significant authority to manage the school division in a way that reflects local needs and priorities.

Saskatchewan is a diverse province and school divisions differ greatly in terms of student body, local priorities and local circumstances. Boards of education must have autonomy in order to respond to educational needs and expectations in their division. They must be able to establish their own spending priorities and set their own levels of expenditure.

Boards of education must receive the major portion of their funding unconditionally, so that they have high capacity to respond to local needs and priorities.

## Balance

### Definition

- an even distribution of weight or amount
- bring into or keep in equilibrium
- establish equal or appropriate proportions of elements in [a formula]
- have debits and credits equal (Gage Canadian Dictionary, 1983)

### Description

Balance in educational finance means:

1. All nine principles are reflected in funding formulas and checks and balances are established to ensure this occurs.
2. Finding the appropriate balance between conditional and unconditional funding from the provincial government. This balance may vary from year to year and may also vary from one school division to another. For all school divisions, the greatest proportion of funding should be unconditional; conditional funding should be based only on need or special circumstances.
3. Finding an appropriate balance between the amount of funding that might be desirable and the amount the tax base can reasonably be expected to provide.

## Equity

### Definition

- fairness; justice
- what is fair and just (Gage Canadian Dictionary, 1983)

### Description

Equity means fairness; it does not necessarily mean equal (Nova Scotia Regional School Boards, 2004; Our Children..., 1997). Student learning is at the heart of equity. Funding must be allocated so that all elected boards of education have the resources they need to achieve equitable student outcomes.

Two types of equity are important:

1. **Horizontal Equity** – means that the quality and availability of core programming in each community is equivalent. A provincial definition of “core” programming would provide a foundation for this type of equity.
2. **Vertical Equity** – means that students who have different or special needs are provided with different or special approaches to programming and service delivery in order to maximize their learning (Nova Scotia Regional School Boards; 2004). Because the number and type of students with different or special needs varies from one community to another and one area of the province to another, the amount of funding that is needed to achieve equitable student outcomes will also vary.

Funding formulas need to accommodate both types of equity.

Three points need to be considered to achieve equity:

1. Differences in school divisions’ geography, students and culture which may affect student outcomes.
2. The actual cost of operating small schools of necessity which will always exist in some areas of the province and play a vital role in student learning.
3. The actual number of students enrolled in the school division during the current school year.

Equity in education funding is central to producing equity of outcomes for all students – to ensuring that all Saskatchewan students achieve at high levels regardless of where they live in the province and their personal circumstances.

## **Involvement**

### **Definition**

- cause (a person or thing) to participate, or share the experience or effect (of a situation, activity, etc.)
- include or affect in its operations (The Canadian Oxford Dictionary, 1998)

### **Description**

Boards of education must be equal partners, along with the provincial government, in meaningful decision making that supports education finance. They must have significant input when funding formulas are established and accountability processes determined. Boards of education must also have significant input when funding decisions are made in response to evolving issues and unexpected circumstance.

There must be involvement at both the administrative and the political levels; that is, shared decision making between school board administrators and Ministry of Education administrators and between elected school trustees and elected members of the provincial legislature, particularly the Cabinet Ministers responsible for the Ministries of Education and Finance.

## **Predictability**

### **Definition**

- to state, tell about, or make known in advance, especially on the basis of special knowledge
- to foretell something (The Free Dictionary, 2009)

### **Description**

Predictability in education finance means that:

1. Boards of education can offer consistent and ongoing programming which is determined by provincially-defined programs and services, plus accommodation for diversity.
2. Funding formulas are clearly defined and published, so that boards of education can insert their own data in order to estimate income for up to three years and plan for the future.
3. Changes in funding formulas are planned well in advance and in consultation with boards of education.
4. Long-term plans are developed to provide for systematic renewal or replacement of items such as technology, buses and facilities.

## Reciprocal Accountability

### Definition – Reciprocal

- mutual
- expressing mutual action or relation
- a thing corresponding in some way to another; an equivalent or counterpart (Oxford Canadian Dictionary, 1998)

### Definition – Accountability

- responsible; required to account for one's conduct (Oxford Canadian Dictionary, 1998)

### Description

Reciprocal accountability in education finance means that:

1. Elected boards of education are responsible for achieving educational goals and objectives – their own and those of the provincial government – and the provincial government is responsible for providing the resources needed to achieve those goals and objectives.
2. The provincial government and elected boards of education each have a responsibility to be accountable by maintaining a cordial, collaborative working relationship and ensuring that the nine principles of education finance are reflected in all of their actions and decisions.
3. The provincial government and elected boards of education each have a responsibility to provide a complete accounting of resources assigned and resources used.
4. Elected boards of education have a responsibility to release a comprehensive description of the amount and type of revenue received from the provincial government, and the provincial government has a responsibility to facilitate the release of this information.

## Sustainability

### Definition

- endure
- maintain or keep (an action or process) going continuously
- that may be maintained, especially at a particular level (Canadian Oxford Dictionary, 1998)

### Description

Sustainability means that elected boards of education receive funds to achieve provincial and local educational goals and priorities. An important aspect of sustainability is a regular review of funding formulas to ensure they reflect changing educational goals and priorities.

Sustainability also means using reliable, factual data to establish funding formulas and to calculate funding allocations for each school division, based on actual reserves and expenditure requirements.

## Transparency

### Definition

- easily seen through or detected; obvious
- free from deceit or guile; frank (Gage Canadian Dictionary, 1983)

### Description

Transparency in educational finance means:

1. Making information about funding formulas and processes available to the public along with the rationale for these formulas and processes.
2. Ensuring that funding formulas and processes are understandable and straightforward.
3. Establishing monitoring processes that meet the needs of both boards of education and the provincial government.
4. Providing accurate, timely information to the public about resources allocated by the provincial government and resources utilized by boards of education.

### References

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# Appendix B: Capital Funding Recommendations

## Facilities Funding Working Advisory Group – September, 2009

### Recommendations for a New Facilities Funding Model

The Saskatchewan School Boards Association's Facilities Funding Working Advisory Group is chaired by SSBA Executive members Larry Pavloff (Central Constituency) and Janet Foord (Southern Constituency). Trustee members include Donna Ziegler (Regina RCSSD), Lois Smandych (Good Spirit S.D.), Jim Carriere (St. Paul's RCSSD), Wayne Steen (Saskatchewan Rivers S.D.), Ronna Pethick (Living Sky S.D.) and Randy Beler (Chinook S.D.). Administrator members of the Working Advisory Group included Aline Kirk (Prairie South S.D.), Ray Kopera (Living Sky S.D.) Mike Hurd (Saskatchewan Rivers S.D.), Rodd Hoffart (Regina RCSSD), Kim Redekop (Chinook S.D.), Teresa Korol (Good Spirit S.D.) and Mark Nerland (Prairie Valley S.D.). The Group was supported by SSBA staff members Leslie Anderson and Dave Jackson.

The Facilities Funding Working Advisory Group met on April 8-9 in Regina, on May 20 in Saskatoon (as part of the Group's Provincial Facilities Think Tank) and on June 9, 2009 in Warman.

Following are the key recommendations of the Facilities Funding Working Advisory Group. The SSBA and boards of education/CSF are fully committed to working with the Ministry to ensure publicly-funded education is delivered in quality facilities that best meet the learning needs of Saskatchewan students. The Working Advisory Group is also of the firm belief that if adequate facilities funding is provided, the details of how that funding would be fairly distributed could certainly be worked out.

**Recommendation # 1:** Facilities funding in Saskatchewan should be determined according to the following five categories:

#### 1. Major Capital

The province should continue to approve major capital projects which would include new schools, major renovations, roofing and portable classrooms. However, there is a need to create a "level playing field" and a shared understanding of the rules when it comes to the approval process.

There is a need to develop a common template or application form for funding for new school construction. Currently, the best crafted written proposals are more likely to be successful. A transparent, detailed and consistent application form should be developed to ensure all applications are being considered fairly.

#### 2. Infrastructure Renewal

Each year, the province should allocate 2% of Current Replacement Value to school divisions for the purpose of ongoing infrastructure renewal.

A formula for the distribution of this funding should be developed in consultation with school boards/CSF. The formula must provide for funding which is adequate, predictable and sustainable.

School divisions should develop 5-Year School Division Facilities Plans which provide comprehensive rationale for specific renewal capital projects, education programming, operating capacities, and current condition of facilities, land use, demographics, local community and economic development strategies.

As well, for all projects considered to be of high priority by the division, a detailed Project Report should be developed and updated annually. This report would outline project rationale, cost estimates and a comprehensive business case.

Some of the factors which should be considered in the infrastructure approval process include: Student enrolment, age of building, eligible school space, geographic location and other pertinent factors.

This recommendation addresses the need for school board/CSF accountability. As well, it speaks to the need for an adequate, dedicated amount of funding for boards/CSF to use at their discretion for annual infrastructure renewal. Such renewal would reduce the need for major capital projects (new schools) and would result in cost savings over the long term. The Ministry should provide provincial guidelines regarding how this money could be spent, but boards/CSF should retain the autonomy to make the final decision regarding infrastructure renewal expenditures within the school division.

### **3. Ongoing Operation and Maintenance**

Ongoing operation and maintenance accounts for approximately 11-13% of school divisions'/CSF's total budgets. There is a need for the Ministry and boards/CSF to jointly develop a formula to distribute adequate funding to operate and maintain facilities.

The specific facility needs of particular grades and class-size should be considered in the development of this formula, as well as such factors as special needs students, sparsity, distance and travel, and small schools by necessity.

### **4. Non-School Facilities**

The province will need to develop a formula to distribute adequate funding to construct and maintain non-school facilities such as transportation and administration facilities.

### **5. Provincially Protected Schools**

Restrictions have been placed on school divisions with respect to their ability to close schools. The province must continue to fund the operation and maintenance of these schools and where needed provide funding to decommission space that is no longer required.

**Recommendation #2: Capital Funding Backlog**

There is a need to develop a specific, long-term, sustainable plan to address the current capital funding backlog, estimated to amount to \$1.5 billion. The fact that we are creating a new funding model provides an opportunity to develop a specific plan to address this shortfall. A minimum of 10% of the shortfall should be allocated annually to address this backlog.

**Recommendation #3: Ministry Support**

The Ministry must maintain sufficient staffing levels to provide support for school divisions around school capital projects including: project management, technical, site development and cost management.

The Saskatchewan School Boards Association, along with other Saskatchewan educational organizations, has a responsibility to promote education equity. The Education Equity Working Advisory Group recommends that the Saskatchewan School Boards Association take the following actions to enhance education equity in this province.