

2010: SB5

MEMORANDUM TO: Directors of Education

FROM: Andrew Davis
Director
Financial Analysis and Accountability Branch

DATE: February 17, 2010

SUBJECT: Multi-year Planning Tool

In response to recommendations of the Declining Enrolment Working Group, and as mentioned in 2009: SB41, the Ministry is taking measures to help boards with their multi-year planning. I am pleased to inform you that, as a first step, a new forecasting tool is now available. You are encouraged to use this new tool for internal planning purposes, but there is no ministry requirements or submission related to it. Over the next few months, we will be interested in receiving your feedback on the process to ensure that it is a meaningful and efficient planning tool.

This tool makes use of EFIS to allow you to perform three-year funding forecasts, based on a data upload of the following:

- enrolment as per current definitions of Average Daily Enrolment (Schedule 13);
- the teaching grid (Section 7); and
- an adaptation of the facility data from Appendix C.

The input template contains all projected benchmark updates as of the release of the 2009-10 Grants for Student Needs, including the Provincial Framework Agreements commitments as well as adjustments to the Student Transportation Grant and Top-Up funding through School Renewal and School Operations. Please note that policy work on the Early Learning initiative is currently in progress and, therefore, is not built into this year's application. This tool is to assist in a preliminary budget forecast which will need to be revisited after the release of the GSN.

Boards have the flexibility to manipulate the data to produce as many simulations as are necessary. The application output will equip boards with the following:

- a grant-by-grant summary of operating allocations for each year;
- a summary of key data; and
- a graphical dashboard representing this key data.

Having a common template for these plans is expected to facilitate the sharing of data and best practices among boards. As well, boards may wish to provide trustees with this information.

In keeping with the Working Group's recommendation to streamline reports, the Ministry will start collecting the enrolment projections from this template next year in place of the projections that are traditionally collected in January.

Attached is a detailed instruction guide for your reference. For further information, please contact: Mark Bonham at 416-325-8571 (mark.bonham@ontario.ca) or Stephen Shek at 416-325-8396 (Stephen.shek@ontario.ca).

A handwritten signature in dark ink, appearing to read 'Andrew Davis', with a stylized flourish at the end.

Andrew Davis

cc: Superintendents of Business and Finance