

Instructions for EFIS multi-year forecasting tool

Background

A multi-year GSN grant allocation forecasting tool is now available in EFIS

This tool accepts three years projected data of enrolment at the school level, teachers' qualification and experience distribution, other inputs and Appendix C data resulted from the enrolment. The application uses the input data and applies the benchmarks and grant regulation table amounts for each corresponding year to calculate and display the GSN operating grant allocations for these three years.

The benchmarks, table amounts and the EFIS calculation reflect changes applicable to these three years which have already been communicated to the sector. These changes include:

- Salary and funding changes from the Provincial Framework Agreement
- Announced funding constraints including the 50% reduction of enrolment change support in transportation allocation; the reduction of top up funding level from 20% to 18% in 2010-11 and 15% in subsequent years.
- The \$21.5M staff development funding constraint under Pupil Foundation allocation is lifted.
- \$5M Internal audit and audit committee funding from 2010-11

Input

An Excel input template for the tool can be downloaded from EFIS under the Reports module by clicking "Projection Input Template".

There are several type of inputs required for the tool to calculate the GSN allocations for each year:

- Enrolment
- Teachers' qualification and experience (Q&E) distribution grid
- Other input
- Appendix C data

Enrolment

The enrolment input template (worksheet name is "Enrolment-Effectif") is preloaded with the board's schools that are in operations and the Average Daily Enrolment (ADE) based on the current 2009-10 Appendix C (i.e. ADE pupils of the board, excl. over 21). Additional rows are added on the top of the school list for boards to input any new schools that will be opened in these three projection years.

Boards must input the projected ADE and the On The Ground capacity (OTG) for each school in all three years. For Elementary schools, separate enrolment for Junior

Kindergarten(JK), Senior Kindergarten (SK), Grades 1 to 3 and Grades 4 to 8 are required. For Secondary schools, separate enrolment for age under 21 students and age over 21 students are required.

For any new schools that will be opened during the projection years, boards must input the school type (as defined under “Top up” tab column 6.4) in order to trigger the calculation of the School Foundation allocation and Supported School & other allocations if applicable. Other relevant data has been filled as placeholder information which you may chose to change as necessary.

The total ADE information for the three years is summarized at the top of the “Enrolment” input template. The tool assumes that the number of pupils and FTE are equally split between October 31 count date and March 31 count date based on the ADE for grant calculation purpose.

Please note: all input fields must contain a value (ie. If nil, enter 0) in order to create the final pipe-delimited file for upload.

Teacher qualification and experience distribution grid

The projected teacher FTE placements in the Teacher qualification and experience distribution grid for the three years must be input in the “Teachers-enseignant(e)s” worksheet.

In preparing their projections, board should factor in enrolment changes in projecting the FTE teachers, and must also take into account their teacher demographics in determining the teacher movement on the grid.

Please note: all input fields must contain a value (ie. Where nil, input 0,) in order to create the final pipe-delimited file for upload.

Other input

The “Other input-L'autre entrée” worksheet lists inputs that are required to complete the grant calculation but are not related to enrolment and the teachers’ qualification and experience distribution information input in the other worksheets. These inputs are pre-populated with values based on board submitted 2009-10 Estimates.

Boards can modify the pre-populated values to more accurately reflect its forecasting plan in any of the three years.

The tool does not include calculation of Capital grants, however, under Board Administration allocation, there is a 1% of eligible capital funding for Director of Education & Supervisory Officers allocation and Board Administration cost allocation respectively. To assist boards in projecting this allocation, the amounts from the board’s 2009-10 Estimates are pre-loaded, which the board could changet if necessary.

Appendix C data

The input template uses 4 worksheets to calculate the Appendix C data based on the enrolment input:

- Appendix C-Annexe C
- Top Up
- School Foundation & others
- DEA - Top up

The Appendix C data for each projection year must be done separately for each year following the steps below:

1. Ensure the enrolment input for each projection year is completed in the “Enrolment-Effectif” worksheet.
2. In the “Appendix C-Annexe C” worksheet, press the “Total” button in the worksheet page. A macro will cycle through each projection year and copy the required totals from the “Top Up”, “School Foundation & others”, and the “DEA – Top Up” worksheets in to the appropriate cells in the “Appendix C-Annexe C” worksheet.
3. To view the detailed results for each projection year, go to the “Top Up” worksheet. You may change the projection year by selecting from the drop-down box in Cell E10.

Uploading input for grant calculation

Select the “Cover” worksheet and press the “Create File” button on the worksheet. This will activate a macro which will prompt the user for a location to save the pipe-delimited text file that will be used as an upload to the projection application.

Once the file has been created, you must log in to EFIS and select the new menu item, “Projection Upload”. The screen provides for a “Browse” button that will allow the user to select the text file that was created in the previous step above.

Although a complete grant calculation requires complete input in all the four tabs mentioned above under input, board could upload their data at any stage of their input even though it is not completed. However, Boards should aware that grant calculation in this case is not complete.

Multi-year Operating Grant allocation output

Shortly after uploading the input in EFIS, an output Excel file containing the multi-year Operating Grant allocations and other key information based on the input will be available for download through a pop-up window.

The output file contains the following information:

- “Dashboard” worksheet which present some key information, such as revenue versus enrolment, students per teacher, school utilization, and teacher qualification statistics in graphical format.
- “Analysis” worksheet which shows data supporting the graphs.
- Multi-year operating grant by allocations under the “Report” worksheet.

Please note that the uploading and output process can be done multiple times with different input data.

Contacts

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