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2021: SB23

Date: October 18, 2021

Memorandum to: Senior Business Official
Superintendent of Facilities/Planning

From: Andrea Dutton
Director
Capital Policy Branch

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Subject: School Level Data Verification for 2021-22 Financial Statements and 2022-2023 Estimates/Revised Estimates and Updates on SFIS Business Rules and Procedures

The purpose of this memo is to inform school boards on the following topics:

- 1) School Level Data Verification (SLDV) process for the current and upcoming school year; and
- 2) School Facilities Inventory System (SFIS) business rules and procedure updates.

Section 1. School Level Data Verification

The goal of the SLDV process is to verify and confirm school level data for 2021-22 Financial Statements and 2022-2023 Estimates/Revised Estimates. School boards can now download the SLDV files from the Education Financial Information System (EFIS) File Download Portal (FDP) under the 2022-23 Estimates folder as explained in the [FDP User Guide](#). School boards are required to verify their school level data and update the various ministry systems outlined in Appendix A, Table 1, to ensure:

- Boards generate funding for all their schools in the 2021-22 financial statements and 2022-23 estimates/revised estimates.
- Data in SFIS support existing grants and funding levels.
- Completeness of data to support broader decision making and other capital activities.

The final list of schools for 2021-22 will be reflected in the school level input form of EFIS when the 2022-23 estimates forms are released. The school level funding for 2022-23 estimates and revised estimates will be

allocated using this final list. School boards will have the opportunity to revise the lists in the 2021-22 financial statements as part of next years' school level data verification process.

The final lists of schools eligible for funding for 2021-22 will be sent to school boards for verification and confirmation by April 30, 2022. Please note that the list will include remote learning schools, where applicable, for reference purposes. As in the previous year, please note that remote learning schools are not eligible for school-based funding, and school boards will be required to distribute any FTE reported in OnSIS in remote learning schools back to the students' home schools for each count date in EFIS. School boards are requested to contact the ministry's finance officers for any discrepancy and confirm the lists by June 15, 2022. Further details will be available and communicated when the 2021-22 final lists are ready. The final lists will be used for the school-based funding calculation in the 2021-22 financial statements, which includes the following:

- Top-up component within the School Operations and School Renewal Grant (which also indirectly affects funding through the Declining Enrolment Adjustment);
- School Foundation Grant;
- Supported Schools Allocation;
- Actualisation linguistique en français Allocation; and
- Curriculum and Assessment Implementation Allocation.

Please note that the school type assigned to schools are subject to relevant changes as information such as school enrolment, address, and geographic coordinates are updated in-year. School boards are requested to review all school data provided in the final lists ensuring these are correct.

Deadline for Submission

The verified list must be confirmed by the board's senior business official and senior planning official by signing and dating the "Signature" sheet provided in the SLDV file.

The verified and updated list to ONSIS and SFIS are due on December 15, 2021 and must be submitted to: CPPB-SFIS.Support@ontario.ca.

Please see Appendix A for additional details on the SLDV review including direction related to the Rural and Northern Education Fund (RNEF).

Section 2. Updates on SFIS Business Rules and Procedures

Permanent Building Ownership and Gross Floor Area (GFA) History

The Ministry has noted data anomalies on building history and is currently in the process of fixing these. If such anomalies were connected to buildings operated by your school board, ministry staff should already be in contact with you to apply corrections.

As a reminder, Boards must report the complete and accurate history of buildings GFA in the Permanent GFA/Age Dashboard in SFIS. This applies to schools exclusively or jointly owned by Boards. The ministry understands that complete and accurate information related to leased spaces is sometimes difficult to obtain, we recommend that you contact SFIS support staff to better assess minimal requirements for these facilities.

For additional details related to business rules for permanent building ownership and GFA, please refer to Appendix B.

Reminder Related to Program ID or Board School Identification Number (BSID) Requests

BSIDs are to be requested by school board's OnSIS administrative staff. When a school board submits a BSID request, it should ensure that the SFIS record is created prior to submitting the BSID request in OnSIS. The

SFIS record created should be populated with the same facility name and address information as that in the BSID request to align the SFIS and OnSIS data.

Finally, the ministry continues to work on SFIS data cleanup activities ensuring that the information in SFIS is current and accurate at any given time. We appreciate your constant collaboration. Additional updates planned for the remainder of the 2021-22 school year and will be communicated accordingly.

Contacts

For further information please contact:

- for SFIS: CPPB-SFIS.Support@ontario.ca / cc: Alexandre.Beaudin@ontario.ca.
- for OnSIS: ONSIS_SISON@ontario.ca
- for school level funding questions: Ministry's finance officers

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Appendix A: SLDV Review Details

School boards are requested to review all school data provided in the final list ensuring these are correct. Please note that:

- All changes made in SFIS must be completed in collaboration with the SFIS team.
- BSIDs must be obtained through OnSIS and added to SFIS appropriately.
- The SFIS team will update the Geographic Information System (GIS) data in SFIS as necessary.
- An SFIS ID must have only one BSID at any given time although a BSID can be used by multiple SFIS IDs.
- If a school moves to a new building or campus, a new SFIS record must be created (SFIS IDs cannot be reused).
- Each facility type in SFIS needs a corresponding SFIS record.
- Updates made in SFIS must be applied in ONSIS where appropriate for data consistency.
- Room changes must be reflected in the school year that the changes are made to accurately reflect the OTG capacity of the school.

If the data for a school is not correct or if school data is missing, school boards should make the correction(s) in the appropriate ministry system listed below, as well as indicate the changes in the file according to the instructions in the Guide tab.

Table 1

Data	System to be updated
School Name	SFIS
SFIS ID	SFIS
BSID	Must be obtained through OnSIS / Must be updated in SFIS
Campus ID	SFIS, based on validated address
Building ID	SFIS
Ownership	SFIS
Facility Type (panel)	SFIS
Status	SFIS
OTG (capacity)	SFIS
Address	SFIS, including geographic coordinates
Municipality	SFIS
Postal Code	SFIS
RNEF Eligibility	List of Schools Eligible for RNEF Allocation as per direction provided below

School Status Updates and Information Requirements

The SLDV files will include all schools with a status of “Open”, “Planned” or “Under construction”.

- Planned or Under Construction: School boards must provide the forecasted school opening date for all schools with a “Planned” or “Under construction” status.
 - Schools that will have a forecasted school opening date that falls within the 2022-23 school year will see their status changed to “Open” in 2022-23.

- Only schools with a status of “Open” in 2021-22 in SFIS will be included and uploaded in the final lists of schools that are eligible for school and facility level funding in EFIS for the 2021-22 financial statements.
- Only schools with a status of “Open” in 2022-23 in SFIS will be included and uploaded in the final lists of schools that are eligible for school and facility level funding in EFIS for the 2022-23 estimates/revised estimates.

Adult and Alternative Schools

For adult and alternative schools (those with panel “ADU” or “ALT”), columns are included for both the 2021-22 and 2022-23 school years for school boards to report whether they will have enrolment of regular day school students under the age of 21. It is important that school boards complete these columns for each school year. If the board doesn’t plan to have enrolment of regular day school students under the age of 21 in such school, it will not be included on the list of schools in EFIS. This list of schools is used to measure distances between facilities and schools, which determines school type for purposes of the School Foundation Grant as well as eligibility for enhanced top-up. Therefore, if the list is not accurate, then some school attributes will be incorrect and will not generate the proper school-based funding.

Other SLDV Updates

As some of the school level data changes may take time to process, such as applying for a BSID or mapping of a school in GIS for school distance calculation purposes, school boards are advised to start the updating process for new schools as soon as possible if it has not yet been done.

The ministry understands that some data, such as postal codes, may not be available at the time of the verification; however, school boards should update the systems with what is available at the time, while waiting for the complete information to become available.

Rural and Northern Education Fund (RNEF)

As a reminder, school boards continue to be required to spend the Rural and Northern Education Fund (RNEF) funding using the List of Schools Eligible for RNEF Allocation. School boards may modify the lists by passing board motions and should indicate in the SLDV if they intend to do so. The board motions along with the list of additional schools must also be submitted to EDULABFINANCE@ontario.ca including the following data:

- school name;
- SFIS ID;
- campus ID;
- BSID; and
- panel (elementary/secondary)

When submitting the board motions and list of additional schools, please include “RNEF” in the subject line of your email. Once board motions have been received, the ministry will seek approval for amendments to the regulations to reflect the changes to the lists.

Appendix B: SFIS Business Rules Reminder

Permanent Building GFA History

We would like to take this opportunity to highlight business rules that help ensuring that building histories are complete and accurate:

- All SFIS IDs should include an “Original” GFA/Age record unless it uses a portion of a building which is not “Original”. At an aggregate level the sum of all SFIS records (SFIS IDs) should provide a full history of the GFA/AGE record for that building (Building ID).
- There are 3 types of GFA/Age records that can be created per SFIS IDs/Building IDs: “Original”, “Addition” and “Demolition”.
- At an aggregate level, for each building, we should find minimally an “Original” record which should represent the original GFA and age (i.e. year built) of the building.
- If applicable, one or many “Addition” and “Demolition” records may be necessary to understand the GFA and Age history of a building.
- If the “Original” building was entirely demolished, both “Original” and “Demolition” records are required to complete the history of the building.
 - Example: if a building was built in 1910 with a GFA of 1,000 m², received an addition of 2,000 m² in 1960 and an addition of 5,000 m² in 2010 and saw its original section fully demolished in 2010, we should see in the building History four records, one for each event where the total GFA should be equal to 7,000 m².
- If the original building is partially demolished, the portion demolished must be reported under “demolition” with the corresponding GFA from the building space.
- Additional buildings on a campus should not be considered as an “addition” to the main building but rather an additional building. After creation of a SFIS ID for that additional building, the “original” and subsequent “additions” rule applies.
- When modifying data in the Permanent GFA/Age Dashboard, boards are encouraged to review the entire building data set (Building ID) in the current and previous school year for consistency. If changes are needed to previous or future year(s) please communicate with the SFIS team for support.
- When a building is shared by co-terminous boards, they are expected to collaborate and coordinate information on Permanent GFA/Age Dashboard to accurately capture the building space data. This is required in instances where spaces are shared to avoid double counting and misreporting of information.

Building and Land Ownership

- Building and land ownership are defined as follows:
 - **Exclusive Ownership:** When the building or land is exclusively owned by a board, the building and land owner name has to be the owning board.
 - **Joint Ownership:** For joint ownership, the building or land ownership name must be the boards that jointly own the building or land.
 - **Lease from another school board:** When the building or land is leased from another board, the building or land owner name is the owning board.

- **Lease from a 3rd party:** When leased from a 3rd party, the building or land owner name is the 3rd party owner.
- When a 3rd party leases a space in a building that is exclusively or jointly owned by one or more boards, the 3rd party lease must be reported as a separate record in SFIS by the owning board/s as a Facility Holding Leased to a 3rd party (HFA-LEA) indicating the spaces and the area utilized.
- Building ownership is separate from land ownership. As such, when a board owns and maintains a building on a leased land, building ownership must identify owning board. However, in such case, land ownership must identify the lessor which requires intervention from the SFIS support team by emailing CPPB-SFIS.Support@ontario.ca.