



Submission

The Fix is In:

"How the Education Funding Formula is Slanted Against Support Staff And What Can Be Done to Improve It"

By the Ontario Division

of the

Canadian Union of Public Employees

**Toronto, Ontario
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Our plan includes smaller class sizes, a better curriculum and a revised funding formula along the lines suggested by Rozanski...we're going to fix that formula. (Dalton McGuinty, Ontario Hansard - May 5th, 2003)

Introduction

The Canadian Union of Public Employees represents about 50,000 employees in the province's elementary and secondary school system. CUPE has more than 100 bargaining units in the province's public, Catholic and Francophone boards, and we represent employees in virtually every classification save for classroom teachers, principals and vice-principals, and senior board staff.

Despite these numbers, and the crucial roles that support staff play in the school system, this government apparently endorses the way the funding formula views CUPE members as almost incidental to the smooth running of our schools. In a recent response to one of our members from the Dufferin-Peel Catholic board, who is losing her job, the Premier implied that programs for students will improve despite support staff layoffs. That's an insult to support staff, not to mention a slap in the face for someone losing her job.

While we welcome this opportunity to make recommendations for fixing the funding formula, our enthusiasm is tempered by the fact that we have been making suggestions to improve it since it was introduced but have been virtually ignored. Had our advice been heeded in the past the system would not be facing the crisis it is today. We can only hope that this time our voices will be heard.

Rozanski and Mackenzie are our Reference Points

Four years ago CUPE submitted an extensive brief to the Education Equality Task Force (EETF), chaired by Mordechai Rozanski. Though his final report did not address all of our concerns, it did address what we considered to be some of the most serious deficiencies in the formula: unrealistic benchmarks and inadequate overall funding levels. While this government, like the previous government, has

made progress on some of the EETF's recommendations, failure to address the fundamental underpinnings of the formula, the heart of the EETF's recommendations, has created the crisis we are facing today. Thus our first recommendation is that the Ministry dusts off our brief to the EETF and the task force's report, and compare its reforms of the funding formula over the past few years to our recommendations and those of Dr. Rozanski.

Our recommendations are also heavily influenced by the ongoing analyses of the Canadian Centre for Policy Alternatives associate Hugh Mackenzie, whose latest paper on education funding in Ontario, *Turning Point* shows that he remains the most astute critic of the funding formula introduced by Mike Harris' government in 1998. Mackenzie says, "at its root, the problem is that nearly a decade after its introduction, too little has been done to address fundamental defects in the design of the funding formula imposed by the Harris government..."¹

Our aim in this submission is to show how the defects in the funding formula, identified by Rozanski and Mackenzie, have impacted disproportionately on support staff, and to suggest changes that will make the formula fairer for all.

Funding Formula Benchmarks

Dr. Rozanski identified inadequate benchmarks as a crucial factor in the crisis that beset the education system as a result of the introduction of the funding formula in 1998. Rozanski's number one recommendation, one that would have cost over \$1 billion in 2002, was that "the Ministry of Education update the benchmark costs for all components of the funding formula (the Foundation Grant, the Special Purpose Grants, and the Pupil Accommodation Grant)."

This critical recommendation has not been fully implemented and, as Hugh Mackenzie says, "in the absence of action on these underlying funding issues, the

¹ Hugh Mackenzie, "Turning point? Time to renovate Ontario's education funding formula," CCPA, October 2006.

elementary and secondary education system in Ontario will continue to operate in an atmosphere of perpetual fiscal stress.”²

The Ministry finally got around to updating some benchmarks in the 2006-07 GLGs, but benchmarks governing the so-called “non-classroom” areas--those of most importance to support staff--were largely left untouched. For example, the GLGs released last June contained a 2% increase in the school operations grant for non-salary benchmarks, primarily to cover increased utility costs. Yet the cost of water, fuel and electricity increased 14% from June 2005 to June 2006, widening the gap between provincial funding and boards’ costs.³

For salary benchmarks, this year’s pupil and school foundation grants contained a highly touted 8.3% increase to the teacher salary benchmarks, as well as to salary benchmarks for principals, VPs and school secretaries. Yet other support staff benchmarks in the pupil foundation grant, such as those for paraprofessionals and JK/SK education assistants, were left intact, save for a 2.5% increase to meet collective agreement commitments for 2006-07. Moreover, the foundation grants provided no increased funding for support staff benefits, despite the fact that benefit costs have been regularly increasing faster than the rate of inflation.

Not only did the GLGs largely ignore support staff salary benchmarks, the way the ministry decided to fund the updated teacher salary benchmark adds injury to insult for support staff. Instead of putting new money into the system, it redirected money from grants for local priorities and learning opportunities--grants that gave boards flexibility to fund unique programs that met local needs, and hire additional support staff.

² Hugh Mackenzie, “Turning point?”

³ Statistics Canada, [Consumer Price Index](#), June 2006.

Boards now receive \$6 per student for regular program EAs (just over half what boards receive for staff development, \$11 per student). This level of funding will not reverse the situation across the province where almost no boards now can afford to hire EAs for kindergarten classes.

Given the province's highly touted initiative to reduce class sizes, this lack of funding for regular program EAs is puzzling. The class-size cap and collective agreement provisions respecting teacher preparation time have left school boards scrambling to cover gaps created by too few teachers. It has led to a situation where more and more boards are using special education EAs to supervise students in classrooms. We suggest that a way to remedy this problem is to provide boards more funding for regular program EAs.

Pupil Accommodation Benchmarks

As long as boards continue to receive less than they need to run their schools this province will continue to experience a crises in education. The signs of the under funding of school operations are obvious: poorly-maintained heating and ventilation systems, dirt, grime & dust, peeling paint, rotting window frames, leaking faucets and broken toilets. Not only are classrooms not as well cleaned as they used to be, in some boards they are only cleaned every other day, because of staff cuts. A glance at most school yards also reveals obvious signs of neglect. Less apparent but undoubtedly more dangerous are the moulds and possibly asbestos lurking in hard-to-see (and seldom maintained) areas.

Cuts to custodial and maintenance staff, laid off by the thousands since the funding formula was introduced, have led to a deplorable decline in the conditions under which are children are taught. Viral contagions spread more easily in these conditions, leading to more student absences and staff sick leave. Evidence continues to grow that the physical conditions under which student have a direct correlation to student achievement, and the funding formula short changes

students when it forces school boards to cut corners on cleaning and maintenance.

The under funding of school operations was built into the funding formula by design. Ignoring the recommendation of an expert panel, the authors of the formula used as the initial benchmark for school operations the median cost of all the provinces' school boards—\$5.20 square foot, rather than the more logical *average* cost, which was \$.26 sq. ft. (5%) higher at the time. As Mackenzie points out, boards serving the majority of students had higher costs than \$5.20. Though the benchmark has increased several times since Rozanski reported, and is now at \$5.97 sq. ft., the increases have lagged behind the rate of inflation, and because it remained at \$5.20 for years the benchmark was responsible for a huge backlog of routine maintenance projects that plague boards still.

As a result, the current benchmark leaves school boards with a \$375 million annual deficit in school operations funding, according to Mackenzie's recent estimate.⁴ But even that eye-opening amount understates the true school operations deficit. Since the formula was introduced, the artificial distinction made between "classroom" and "non-classroom" areas of the school has enticed boards to dip into their school operations funds to cover shortfalls in the "classroom" envelopes. The Minister cannot imagine the frustration felt by our members when they have to watch funding for school operations, inadequate as it is, get reallocated to make up for shortfalls in "classroom" funding, because cleaning and maintaining classrooms doesn't count as "classroom" spending!

Year after year, one board after another has postponed routine maintenance of mechanical, electrical and plumbing systems to direct the maximum amount of funds towards "the classroom." In 2002 Rozanski estimated the deferred maintenance backlog at almost \$6 billion province-wide. By the time of the

⁴ Hugh Mackenzie, "Turning point?"

government's February 2005 Good Places to Learn announcement of funding to support \$4B in renewal--only part of which was intended to address deferred maintenance -- that estimate had grown to \$8B. Someday soon, the roof is literally going to cave in on the funding formula's failure to keep our schools in top condition.

Under funding of school operations is the leading defect in the funding formula now that teacher salary benchmarks have been (notionally) addressed. It has led some boards to enter into ill-advised contracting out schemes that may save them money in the short term; but our research shows that contracting out comes at the price of experienced, dedicated workers, and implicates school boards in low-wage strategies. Contracting out of cleaning to firms that pay low wages and benefits (if any) is a practice that, in the interest of province-wide standards, the government should forbid rather than tolerate.

We simply recommend that the formula be revised so that it allocates to boards the funds they need to keep all their facilities in top condition. Clearly, significant funds will be required; first to restore schools to the top condition they used to be in, then to maintain them in that state. Ministry officials should meet with support staff unions and school boards on a regular basis to establish and keep current appropriate benchmarks for costs per square foot and pupil area requirements.

Special Education/Educational Assistants

Educational assistants and special education support workers (we will call them all EAs) know that the education funding formula does not give school boards the resources they need to properly deliver special education programs. Most EAs across the province have seen their hours of work cut back to 6 ½ or 6 hours a day since the formula was introduced. EAs get laid off over school breaks and summer holidays. Some even get laid off on PD days.

The result is a low-paying job with a significant risk of injury and/or burnout. Not everyone appreciates that in addition to lifting heavy students as they tend to their daily needs, some EAs are subjected to repeated acts of violence and verbal abuse from students that have severe behavioral difficulties. EAs, the overwhelming majority of whom are women, remain dedicated workers despite often-grueling working conditions.

And their jobs are getting more difficult each year. EAs are increasingly being asked to supervise non-special education students in addition to their regular work; some are doing the equivalent of one day a week of supervision. That amounts to a hidden cut to special education, because that is time not spent with special needs students.

Working conditions are worsening to the point where, last spring, EAs in the Thames Valley board went on strike over a measly additional hour of work per day. However, the Ministry did nothing to respond to the issues that were raised by the strike. In fact, the 2006 GLGs made things worse by severely reducing grants that school boards used to help cover the cost of EA jobs.

Now the predictable results are in: boards across the province are laying off EAs, child and youth workers and other special education support staff in numbers that will amount to several hundred province-wide. Boards plead that they have no fiscal room to increase hours of work or otherwise alleviate EA working conditions. Once again, some of the lowest paid members of the school system are paying for flaws in the funding formula.

The education funding formula needs to be revised to acknowledge the key role that EAs play in the system. Thousands are employed in school boards across the province, but EAs are almost invisible in the formula. The only mention of them in the GLGs is made in reference to JK/SK EAs, of which there are relatively few left. EAs who work in special education programs across the province look in

vain to the Education Act, or the funding formula, for recognition of their value and contributions.

We recommend that EAs, whose importance to the public school system has grown tremendously in recent years, actually be visible in the funding formula. The same way that the pupil foundation grant allocates certain amount per pupil for teachers, JK/SK EAs, etc., the Special Education grant should have an explicit amount for Educational Assistants and other special education support staff.

The amount specified should be determined in consultation with school boards and unions that represent EAs, but it should allow boards to hire EAs for at least 7 hours per day, the minimum EAs need to accomplish the many tasks and responsibilities they are given. EA professional development should also be fully funded, and the Ministry should give consideration to providing boards with funding to allow EA preparation time and professional development to occur during a portion of the current layoff periods.

Adult Education

2006-07 budget balancing exercises at school boards across the province are bringing in more cuts to adult English and French as-a-second language (ESL/FSL) programs and continuing education courses, including International Languages Programs. The Niagara Catholic school board is making \$800,000 in cuts to its adult education instructor's budget. The York Region DSB, traditionally one of the better-off boards under the funding formula, is making \$275,000 in cuts. Other boards may be forced to make cuts as fallout from their budget balancing exercises.

Adult education and language instruction programs for newcomers play vital roles in our communities. They deserve to be placed on solid foundations, and students and the staff of dedicated instructors who deliver the programs need long-term funding commitments from government. However, there is a lot of uncertainty right now concerning government support for adult education and language

instruction: the shift of responsibility for providing language instruction from the ministry of education to the ministry of citizenship and immigration, new eligibility guidelines under the Canada-Ontario Immigration Agreement, and the recent federal government cut of \$17.7 million to its Adult Learning and Literacy Skills program.

The Minister of Education authored a report last year that acknowledged that “Ontario lacks a cohesive system of adult education.”⁵ The report recommended the creation of a secretariat or some such vehicle to coordinate and implement the government’s adult education policy. We urge the government to move quickly on the recommendations of the adult education review.

Adult ESL/FSL and non-credit continuing education programs have been on shaky footings since the funding formula was introduced. The formula barely recognizes the cost of providing adult credit classes--adult learners are funded at about half the level of secondary students--and make almost no recognition of the costs of adult non-credit and language classes. The expenses involved in heating, lighting, cleaning and maintaining classrooms for adult non-credit education is not covered by the funding formula.

The education funding formula needs to explicitly recognize the valuable role that adult education and language instruction plays in our communities. School boards need assurances that the costs of running adult non-credit courses will be covered. At a minimum the funding formula needs to recognize the cost of using school facilities for adult classes. Ideally, the formula should encourage schools boards to use every available surplus classroom or school for adult life-long learning, not penalize those boards who attempt to make creative and productive use of school facilities.

⁵ Ontario Learns: Strengthening Our Adult Education System. Ministry of Education, 2005.

School Closures

The recent lifting of the moratorium on school closures has triggered another wave of announcements of possible school closures by boards across the province. These announcements are creating anxiety in many communities about the fate of their local schools--again. Few issues arouse as much passion as public school closures, testifying to the valuable role schools play in communities, and the fact that so many communities have been threatened by plans to close schools in recent years--many of which were subsequently aborted--reveals another serious flaw in the funding formula.

We acknowledge that overall elementary and secondary school enrolment in Ontario is declining, but we expect the funding formula to better acknowledge that school board expenses do not decline at the same pace as enrolment. The declining enrolment grant, which recognized this at least partially, helping boards cope with the loss of per-pupil funding, was chopped almost in half in 2006-07 to \$65 million.

We question the whole notion that school facilities can be properly funded on a "per-pupil" basis. When enrolment in a school declines, classrooms can be closed off and left unused, but the hallways, gymnasium, offices, etc. of that school still need to be cleaned and maintained. Declining enrolment needs to be mitigated, in the formula, by recognition that operational expenses decline at a slower pace than enrolment.

This year the funding formula made an important acknowledgement, through the new school foundation grant, that every school needs a principal and secretary to function properly. We recommend that the school foundation grant be expanded to take into account the also mandatory expenses of cleaning, heating, lighting and maintaining schools, to truly put schools on solid foundations.

We also believe that neglect of facilities has unduly accelerated the pace of school closures. Deferring maintenance too long leads to costly repairs, and eventually it becomes cheaper to close a neglected facility than to repair it. Under funding of school operations, and diversion of school operations funding to other budget areas, has made it all-too tempting for boards to close schools.

One good recent initiative by the Ministry is funding for community use of schools agreements. Schools are incredibly valuable resources that should be used to maximum advantage as community hubs. Adult education and sports programs for all ages have long-term social and economic benefits, and this Ministry should be promoting and nurturing such initiatives. Fully subsidizing the cost of evening and weekend use of schools helps boards keep good schools open, to borrow a phrase.

The funding formula also needs to give boards resources to provide space for Best Start and other publicly delivered child care programs in schools. Aside from the current federal government, almost everyone acknowledges schools are ideal child-care delivery sites, and fostering such use will help sustain the viability of schools in areas of declining enrolment.

Public schools are incredibly valuable community resources, and rather than tempt urban school boards to sell valuable school properties to eager developers, the funding formula should encourage creative use of schools in ways that benefit entire communities, including adult education and language programs, community use of school programs, and child-care programs.

Local Priorities and Learning Opportunities

The elimination of the local priorities grant and the drastic cut to the learning opportunities grant leaves school boards with virtually no flexibility to offer educational programs that meet the particular needs of their populations.

The Toronto DSB's plan to balance its budget includes cuts to JK/SK EAs, outdoor

education centres and swimming pools. Other boards have had to chop literacy, early learning and ESL programs.

In recognition that a “one size fits all” funding formula could not take into account local needs in every community, Dr. Rozanski recommended that 5% of the foundation grant should be flexible so that boards could use it for local priorities. Other experts state that 10% is the appropriate amount, while still other would go back to the days when local trustees had complete control over school board budgets. One of the original stated aims of the government that brought us the funding formula was to equalize funding across the province because reliance on local tax bases for school funding had led to some significant inequities between boards. Most observers now feel the funding formula went too far in this respect, and now some boards are left unable to offer the programs that their communities need to thrive.

School boards need some flexibility to offer local programs--true flexibility, not some notional amount in the formula that gets carved up by shortfalls elsewhere in the budget. In past years the Local Priorities boards to fund provincial priorities such as the primary class-size cap have actually used grant. Only when other funding shortfalls in the formula are resolved can boards really have flexibility to run local programs, and between 5-10% of boards' budgets should truly be available for local priorities.

Funding the Teacher Framework Agreement and Provincial Initiatives

Much of the funding shortfall this year is due to fact that commitments to teachers made under the April 2005 framework agreement, and the provincial primary class-size cap initiative, have not been fully funded by the province. Hugh Mackenzie estimates the agreement and initiative to cost \$528M in 2006-07, \$38M less than the total increase in operating funding provided to boards for the current school year.

This deficit has led to many stopgap arrangements across the province, most of which have increased support staff workloads. More classroom spaces are being used, and use intensified in the case of non-primary classrooms, without a corresponding increase in cleaning staff. In addition to EAs being asked to perform additional amounts of supervision and yard duty--on top of their regular duties with special education students--library techs are being asked to supervise high-school students, secretaries are asked to “keep an eye” on students sent to the office while the principal is off at a “twinned” site or teaching in a classroom. IT techs, trades-people and custodians have been asked to “mentor” students.

Many of these arrangements would be fine if they were properly acknowledged and funded under the funding formula, because CUPE members make excellent role models! However, failure to give boards the resources needed to hire either sufficient numbers of either teachers or support staff has intensified workloads to intolerable levels.

Provincial Support Staff Initiatives

The successful discussions and negotiations between the province, teachers federations and the school board associations has not been matched in the past by anything more than a few unproductive meetings between the Ministry and the union that represents the vast majority of support staff in the province’s schools. We believe that the funding formula contains a similar bias--explicit and expansive when it deals with teaching resources, but vague and non-committal on support staff resources.

There are opportunities to make advances on a provincial level on support staff issues which could lead to changes in the formula that redress some of our concerns. We believe regular dialog is needed on costing benchmarks that affect support staff complements. We refer to Rozanski one last time, who recommended regular consultations between the Ministry and stakeholders on benchmark updates.

We believe such discussion could lead to better provincial standards on a range of health and safety and staffing issues. We would like to explore the potential for savings in areas like staff benefits costs, which have spiraled out of control in recent years. In essence, we would like the Ministry, and the funding formula, to benefit from the experience and insight that CUPE brings to the table.

Conclusion

Since preparing this brief, CUPE has been invited to meet with the Minister of Education--for the first time in 18 months--and to a follow-up meeting with the Parliamentary Assistant a few days later. Of course we welcome these opportunities, which must mark the beginning of sustained, productive meetings designed to get the funding formula right on support staff issues.

We are not merely advocating for our jobs, though we make no apologies for that, as the funding formula has disproportionately affected CUPE members and other support staff. We truly advocate for a better education system for our students; we support life-long learning from pre-school through continuing education, and we want to foster full usage of school facilities by community groups.

We want the education system, and the funding formula that underpins it, to offer the same opportunities to our children as we received when we went to school: a first-class experience sustained by top-notch teaching and schools.

The government wants to promote character development among our students, an excellent notion: let's start by giving them schools and staff of which they can be proud!

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