

Date: Tuesday, December 16, 2025
Time: 6:00 p.m.
Venue: District Education Support Centre & MS Teams Town Hall

Item	Description	
1.	CALL TO ORDER	
2.	WELCOME AND ACKNOWLEDGEMENT OF TRADITIONAL TERRITORY We open the meeting with the acknowledgement that the Board holds its meeting on the traditional and unceded territory of the Secwépemc people.	
3.	ADOPTION OF AGENDA – CHANGES / ADDITIONS <u>Recommendation</u> <i>That the Board of Education adopt the December 16, 2025 Regular Board Meeting Agenda as presented.</i>	
4.	ADOPTION OF BOARD MEETING MINUTES A. Regular Board Meeting Minutes – November 18, 2025 <u>Recommendation</u> <i>That the Board of Education adopt the Regular Board Meeting Minutes of November 18, 2025, as presented.</i>	Pg. 5
5.	ADOPTION OF IN-CAMERA MEETING SUMMARY A. Summary of In-camera Meeting – November 18, 2025 <u>Recommendation</u> <i>That the Board of Education adopt the Summary of the In-camera Meeting of November 18, 2025, as presented.</i>	Pg. 12
6.	BUSINESS ARISING None	
7.	DELEGATIONS None	

Item	Description	
8.	SUPERINTENDENT'S REPORT	
6:10pm	Superintendent: Donna Kriger	
9.	EDUCATIONAL COMPONENT	
	None	
10.	NEW BUSINESS	
6:25pm	A. Transportation Program Review	Pg. 14
	Acting Secretary-Treasurer: Jeremy Hunt	
	Director of Operations: Travis Elwood	
	Board Information & Discussion	
6:40pm	B. Amended Budget Priorities	Pg. 38
	Acting Secretary-Treasurer: Jeremy Hunt	
	<u>Recommendation</u>	
	That the Board provide approval of each of the presented initiatives through board motion, respectively.	
7:00pm	C. Board Governance Policies – Section 100	Pg. 42
	Board Chair: Corryn Grayston	
	Board Discussion	
11.	COMMITTEE REPORTS	
	A. Education Directions	
	Committee Chair: Marianne VanBuskirk	
	B. Finance & Facilities/Audit	
	Committee Chair: Amanda Krebs	
7:10pm	i. Salmon Arm Secondary Trail Project – Property Bylaw No. 3-2025 – 3rd Read	Pg. 43
	Acting Secretary-Treasurer: Jeremy Hunt	
	<u>Recommendation</u>	
	<i>That Property Bylaw No. 3-2025 be read a third time, passed and adopted this 16th day of December 2025.</i>	
7:15pm	ii. J.L. Jackson Secondary Proposed Renovation Plans	Pg. 52
	Director of Operations: Travis Elwood	
	Board Information	
7:30pm	C. Labour Relations	
	Committee Chair: Corryn Grayston	
	D. Partner Group Liaison	
	Committee Chair: Corryn Grayston	

Item	Description	
	E. Policy Committee Committee Chair: Brent Gennings	
7:35pm	i. Policy 4060: Accumulated Operating Surplus (Reserve) – Repeal Acting Secretary-Treasurer: Jeremy Hunt <u>Recommendation</u> <i>That the Board of Education approve the recommendation to repeal Policy 4060 – Accumulated Operating Surplus (Reserve).</i>	Pg. 55
	ii. Policy 110: Accumulated Operating Surplus – Second and Final Reading Acting Secretary-Treasurer: Jeremy Hunt <u>Recommendation</u> <i>That the Board of Education approve the second and final reading of Policy 110 – Accumulated Operating Surplus.</i>	Pg. 62
	iii. Policy 1050: Pandemic Planning – Repeal Superintendent: Donna Kriger <u>Recommendation</u> <i>That the Board of Education approve the recommendation to repeal Policy 1050 – Pandemic Planning.</i>	Pg. 68
	iv. Policy 3020: Energy Management – Repeal Superintendent: Donna Kriger <u>Recommendation</u> <i>That the Board of Education approve the recommendation to repeal Policy 3020 – Energy Management.</i>	Pg. 70
	v. Policy 9040: Student Access to Schools - Repeal Superintendent: Donna Kriger <u>Recommendation</u> <i>That the Board of Education approve the recommendation to repeal Policy 9040 – Student Access to Schools.</i>	Pg. 75
	F. Committee of the Whole Committee Chair: Corryn Grayston	
12.	EQUITY, DIVERSITY, AND INCLUSION	
8:00pm	A. Regional Indigenous Education Council (IEC) Gathering Assistant Superintendent: Chelsea Prince Board Information	Pg. 84
13.	BCSTA UPDATE	
8:15pm	Trustee: Corryn Grayston	

Item	Description	
14.	BCPSEA UPDATE	
8:20pm	Trustee: Corryn Grayston	
15.	QUELMÚCW EDUCATION COUNCIL UPDATE	
8:25pm	Trustee: Tennile Lachmuth	
16.	BOARD CORRESPONDENCE	
8:30pm	A. Letter from ECC Minister Beare to CSRD Vice Chair Flynn	Pg. 95
	B. Letter from ECC Minister Beare to Sorrento Elementary School PAC	Pg. 96
17.	TRUSTEE REPORTS	
18.	QUESTION PERIOD	
8:35pm	<p><i>The Board welcomes questions of a general nature, but the primary purpose of the "Public Question Period" is to ask questions about the Board's policies or operations.</i></p> <p><i>Question Period is not a platform for presentations or personal statements. As a reminder, all questions and responses must be germane to the agenda items under discussion.</i></p>	
19.	UPCOMING DATES / EVENTS	
	Winter Break – December 22, 2025 to January 2, 2026	
	Regular Board Meeting – January 20, 2026, 6:00 p.m.	
20.	ADJOURNMENT	

The Board of Education of School District No. 83

Minutes of the Regular Board Meeting of the Board of Education of School District No. 83, held at the District Education Support Centre and via Microsoft Teams Town Hall on Tuesday, November 18, 2025.

Present:

C. Grayston	Board Chairperson	D. Kriger	Superintendent
A. Krebs	Vice Chairperson	J. Hunt	Acting Secretary-Treasurer
B. Gennings	Trustee – <i>via Teams</i>	M. Guillou	Assistant Superintendent (HR)
T. Lachmuth	Trustee – <i>via Teams</i>	J. Findlay	Dir. of Instruction (Early Learning/Elem)
M. VanBuskirk	Trustee	T. Elwood	Director of Operations

Regrets:

C. Prince	Assistant Superintendent (Ind. Ed/St Supports)
R. Findlay	Dir. of Instruction (Middle/Secondary)

1. CALL TO ORDER

Board Chairperson Grayston acknowledged that a quorum was present and called the meeting to order at 6:04 p.m.

2. WELCOME AND ACKNOWLEDGEMENT OF TRADITIONAL TERRITORY

Board Chairperson Grayston opened the meeting with the acknowledgment that the Board holds its meeting on the traditional and unceded land of the Secwépemc people.

Chairperson Grayston reviewed the results of the 2025/26 Board Elections that took place on November 4th, acknowledging the outgoing Vice Chairperson, Trustee Lachmuth, and welcoming the incoming Vice Chairperson, Trustee Krebs.

3. ADOPTION OF AGENDA - ADDITIONS / CHANGES

089/2025 CARRIED *“That the Board of Education adopt the November 18, 2025, Regular Board Meeting Agenda, as amended with the following change:*

- *move Item 12A before Item 8.”*

4. ADOPTION OF BOARD MEETING MINUTES

090/2025 CARRIED **A. Regular Board Meeting Minutes – October 21, 2025**
“That the Board of Education adopt the Regular Board Meeting Minutes of October 21, 2025, as presented.”

091/2025 CARRIED **B. Special Board Meeting Minutes – November 4, 2025**
“That the Board of Education adopt the Special Board Meeting Minutes of November 4, 2025, as presented.”

5. ADOPTION OF IN-CAMERA MEETING SUMMARY

092/2025 CARRIED **A. Summary of In-camera Meeting – October 21, 2025**
“That the Board of Education adopt the Summary of the In-camera Meeting of October 21, 2025, as presented.”

6. BUSINESS ARISING

None

7. DELEGATIONS

None

8. SUPERINTENDENT'S REPORT

Superintendent: Donna Kriger

Superintendent Kriger reported on the following:

- District Strategic Plan – Strategic Priorities
 - currently in year 3 of the Plan and a new Strategic Plan will need to be consulted on in the 2027/28 year;
- Salmon Arm Reconfiguration (Strategic Priority – Organizational Development)
 - review of the 2025/26 changes at J.L. Jackson Secondary and Salmon Arm Secondary as well as the future changes in 2026/27 & 2027/28;
 - the final “single” graduating class will be the 2025/26 grad class;
 - conversations and meetings are ongoing with secondary school administrators and staff regarding the upcoming changes next year;
 - review of the urban and rural elementary school transitions in 2026/27 & 2027/28;
- Strategic Priority – Career Development
 - Director of Instruction, Reid Findlay, received an award from the Career Education Society of BC recognizing him as an Honorary Life Member;
- Strategic Priority – Organizational Development
 - new administrators in Armstrong schools: Gloria Cox will be the new Principal at Pleasant Valley Secondary and Kevin McGifford is the new Principal at Len Wood Middle;
 - upcoming refresh of the District and School websites, with the new format providing easier navigation and consistency across school sites;
 - monthly Strategic Focus publication which includes a “Mindful Moments” section with information provided by the District’s itinerant counselling team.

9. EDUCATIONAL COMPONENT**A. K to 12 Literacy Initiatives**

Director of Instruction: Jen Findlay

Director of Instruction Jen Findlay reviewed her presentation in the agenda on the Ministry of Education and Child Care’s new K-12 Literacy Initiative. She explained that the majority of the initiative’s focus is on early literacy which will include the creation of a BC specific early literacy screening tool; however, there is no definite timeline at this point for when the tool will be released. She highlighted the work already being done in the District to support early literacy, including:

- early literacy screening in Kindergarten using the SD83 Early Learning Profile tool and DIBELS 8 for Grades 1 & 2;
- Literacy Support Teachers;
- Literacy Intervention Model with a focus on Tier 1, 2, & 3 instructional practices;
- professional learning;

- communication with families as well as District and community partners; and
- other assessment tools used to support literacy.

She outlined the professional learning needs for teachers, which the majority of the Ministry funding received would be directed towards, as well as areas for future growth, capacity building, and indicators for success regarding student literacy support. Trustees shared their feedback on the initiative noting the development of the BC Early Literacy Screening Tool, support for writing, and appreciation of the Ministry initiative.

10. **NEW BUSINESS**

A. **Trustee Remuneration**

Board Chair: Corryn Grayston

Board Chair Grayston reviewed the briefing note included in the agenda noting that the consideration would be for a 2.6% increase to trustee remuneration based on the 2024 BC Consumer Price Index annual change as per Policy 136. Discussion ensued on undertaking a more fulsome review of trustee remuneration given the Board decision at its previous Regular Meeting to remain status quo with five Trustees regarding Trustee Variation, as well as reviewing the Board's governance policies prior to the next School Trustee Election and possibly striking a task force to complete this work.

**093/2025
CARRIED**

"That the Board of Education approve the Trustees annual remuneration be increased by the 2024 BC CPI rate of 2.6% effective December 1, 2025 as per Policy 136."

B. **June Board Meetings – Date Change Request**

Trustee: Tennile Lachmuth

Trustee Lachmuth brought forward her request to have the date of the June Board Meetings changed as it conflicts with her daughter's dry grad celebration at Pleasant Valley Secondary. Trustees discussed various alternative dates, consideration as to whether the new date would work for Partner Groups and needing to confirm the remaining District secondary school graduation event dates. The Board agreed that the date would be changed but to table this item to the December Regular Meeting when an alternate date could be finalized.

After Item 17: Trustee Reports, the Board agreed to return to this Item due to information gathered by staff while the meeting was in session.

**099/2025
CARRIED**

"That the Board of Education move the June 16, 2026 Board Meetings, In-camera and Public, to Tuesday, June 23, 2026, at the same times."

11. **COMMITTEE REPORTS**

A. **Education Directions**

Committee Chair: Trustee Marianne VanBuskirk

Trustee Marianne VanBuskirk reported that the Ministry K-12 Literacy Initiative was discussed at the November committee meeting as well as the Numeracy Residency Support Model being piloted at Sorrento, M.V. Beattie, Ranchero, and Falkland

elementary schools, and Communicating Student Learning.

B. Finance & Facilities / Audit

Committee Chair: Trustee Amanda Krebs

Vice Chair Krebs reported that, in addition to the items in the Regular Meeting agenda, the committee also reviewed the renewal agreement with the City of Salmon Arm and Shuswap Recreation Society regarding the Shuswap Middle School Sport Court and the notes from the Environmental Advisory Working Group meeting.

i. Quarterly Financials as at September 30, 2025

Acting Secretary-Treasurer: Jeremy Hunt

Acting Secretary-Treasurer Hunt presented the quarterly financials noting that this quarter is genuinely just looking at September and projecting out, as it is the only month of full school operations. He reported that revenues are as expected and that on the expense side, we are just under where we would like to be at 90% in regard to Teacher Salaries. He noted that there are no surprises at this point; however, staff would continue to monitor salaries and employee benefits as well as rental and lease revenues, following the new January rate increases.

ii. Statement of Financial Information (SOFI)

Acting Secretary-Treasurer: Jeremy Hunt

Acting Secretary-Treasurer Hunt reviewed the briefing note in the agenda highlighting what is included under remuneration and expenses, respectively, in the SOFI report. Regarding the schedule of payments made to suppliers, he noted that a significant portion represents contributions to pension and benefit plans as well as payments to contractors for capital projects, such as Sawchuk Developments Co. Ltd. included in the report regarding the PVSS gymnasium project. The Board discussed sending a letter to the Ministry to have the remuneration limit increased.

**094/2025
CARRIED**

"That the Board Chair write a letter to the Ministry to increase the remuneration limit in the Statement of Financial Information (SOFI) report to \$100,000."

iii. Salmon Arm Secondary Trail Project – Property Bylaw No. 3-2025

Acting Secretary-Treasurer: Jeremy Hunt

Acting Secretary-Treasurer Hunt reviewed the briefing note and presented the supporting documentation included in the agenda on the next phase of the City of Salmon Arm and Shuswap Trail Alliance greenway trails project at Salmon Arm Secondary. He reported that the first phase of the trail project at J.L. Jackson Secondary was completed this summer. He noted that the related property bylaw for this project is being brought forward for two readings, with the third and final reading coming back to the Board at its December Regular meeting.

**095/2025
CARRIED
096/2025
CARRIED**

"That Property Bylaw No. 3-2025 be read a first time."

"That Property Bylaw No. 3-2025 be read a second time."

iv. Transportation Committee – Terms of Reference

Acting Secretary-Treasurer: Jeremy Hunt

Acting Secretary-Treasurer Hunt explained that the Transportation Committee Terms of Reference (TOR) are being brought forward for discussion and feedback on the matter of the Trustee who chairs the committee being in conflict regarding any transportation decisions that are appealed. Director Elwood noted the process and types of information gathered and considered when a transportation decision is made. He explained that currently, the Transportation Committee reports to the Finance & Facilities Committee under the TOR; however, he proposed that the recommendations for transportation decisions come forward to the Board instead. The Board discussed the matter of having a Trustee chair the Transportation Committee and the Committee's TOR. The Board agreed to wait until after looking at the findings of the Transportation Review before discussing this item further.

C. Labour Relations

Committee Chair: Board Chair Corryn Grayston

No meeting in November.

D. Partner Group Liaison

Committee Chair: Board Chair Corryn Grayston

Board Chair Grayston reported that Partner Group Liaison will meet on November 20, 2025.

E. Policy Committee

Committee Chair: Trustee Brent Gennings

i. Policy 110: Accumulated Operating Surplus – First Reading

Acting Secretary-Treasurer: Jeremy Hunt

Acting Secretary-Treasurer Hunt presented the updated Accumulated Operating Surplus policy, which follows policy direction provided by the Ministry of Education and Child Care and best practices. He explained that a sample policy was provided by the Ministry and reviewed the sections regarding Local Capital and restricted capital. He also highlighted the transparency pieces in the policy ensuring that board motions are required for any appropriation or interfund transfers as well as having them linked to the Board's District Strategic Plan. Discussion ensued on the wording in the "Use of Appropriated Surplus and Contingency Reserve" section, the merging of the contingency reserve and unrestricted operating surplus sections from the previous regulation to the new policy, and the percent range of the contingency reserve.

**097/2025
CARRIED**

"That Item 4 of Policy 110 – Accumulated Operating Surplus be adjusted to add after circumstances, 'such as, but not limited to.'"

**098/2025
CARRIED**

"That the Board of Education approve the first reading of Policy 110 – Accumulated Operating Surplus."

F. Committee of the Whole

Committee Chair: Board Chair Corryn Grayston

Board Chair Grayston reported that the next Committee of the Whole meeting is scheduled for December 15th at 5:00 p.m.

12. EQUITY, DIVERSITY, AND INCLUSION**A. Student Support Services – Universal Design for Learning (UDL)**

District Principal (Student Supports): Jo McKenna

District Vice-Principal (Student Supports): Lara Matthews

District Principal McKenna and District Vice-Principal Matthews provided a review of the professional learning and capacity building initiatives in the District being led by the Student Support Services department. They shared how the professional learning aligns with the District Strategic Plan, key priorities, and the evidence-based practices being sourced including Universal Design for Learning (UDL). They reviewed the professional learning to date, the three key principles of the UDL guidelines, why UDL is being used, and the benefits of UDL. They explained the next steps for learning for Principals and Case Managers, upcoming Positive Behaviour Support Plan learning series, and UDL pilots at Highland Park Elementary and Carlin Elementary/Middle.

13. BCSTA UPDATE

BCSTA Provincial Council Representative: Board Chair Grayston

Board Chair Grayston reported on the BCSTA Provincial Council meeting on October 24th that she attended, as well as the BCSTA Board Chairs call on November 13th.

14. BCPSEA UPDATE

BCPSEA Representative: Board Chair Grayston

Board Chair Grayston reported that she is scheduled to attend the BCPSEA AGM on January 29th.

15. QUELMÚCW EDUCATION COUNCIL UPDATE

Trustee: Tennile Lachmuth

Trustee Lachmuth reported that the Council is currently at a learning session this week for professional development.

16. BOARD CORRESPONDENCE

None

17. TRUSTEE REPORTS

Trustee VanBuskirk reported on J.L. Jackson and Bastion PAC meetings as attended as well as the School Learning Plans Trustee Ed. Session. She acknowledged the many Remembrance Day assemblies and projects at schools and Indigenous Veterans Day.

Board Chair Grayston noted that Sorrento, Carlin, and North Shuswap schools are all busy preparing for their Winter Concerts, which she is looking forward to.

The Board agreed to revisit Item 10B of the agenda.

18. QUESTION PERIOD

The Board welcomes questions of a general nature, but the primary purpose of the "Public Question Period" is to ask questions about the Board's policies or operations.

Question Period is not a platform for presentations or personal statements.

No questions were received.

19. UPCOMING DATES / EVENTS

Shihiya Groundbreaking Ceremony – November 21, 2025

BCSTA Trustee Academy – November 27-29, 2025 – Vancouver, BC

Knowledge Keepers Luncheon – December 10, 2025

Regular Board Meeting – December 16, 2025 - 6:00 p.m.

20. ADJOURNMENT

The meeting was adjourned at 8:29 p.m.

Certified Correct:

Corryn Grayston
Board Chairperson

Jeremy Hunt
Acting Secretary-Treasurer

The Board of Education of School District No. 83

Summary of an In-Camera Board Meeting of the Board of Education of School District No. 83, on Tuesday, November 18, 2025, at the District Education Support Centre.

Present:

C. Grayston	Board Chairperson	D. Kriger	Superintendent
A. Krebs	Vice-Chairperson	J. Hunt	Acting Secretary-Treasurer
B. Gennings	Trustee - <i>via Teams</i>	M. Guillou	Assistant Superintendent (HR)
T. Lachmuth	Trustee - <i>via Teams</i>		
M. VanBuskirk	Trustee		

Regrets:

C. Prince Assistant Superintendent (Ind. Ed/St. Supports)

1. CALL TO ORDER

Board Vice Chair Krebs acknowledged that a quorum was present and called the meeting to order at 4:04 p.m.

2. WELCOME AND ACKNOWLEDGEMENT OF TRADITIONAL TERRITORY

Board Vice Chair Krebs opened the meeting with the acknowledgment that the Board holds its meeting on the traditional and unceded land of the Secwépemc people.

3. ADOPTION OF AGENDA – CHANGES / ADDITIONS

Motion:

That the Board of Education adopt the November 18, 2025, In-camera Board Meeting Agenda, as amended.

CARRIED.

4. ADOPTION OF BOARD MEETING MINUTES

A. In-camera Meeting Minutes – October 21, 2025

Motion:

That the Board of Education adopt the October 21, 2025, In-camera Board Meeting Minutes, as presented.

CARRIED.

5. BUSINESS ARISING

None

6. LAND/LABOUR/LAW

The Board discussed three labour matters and two legal matters.

Trustee Gennings left the meeting at 4:57 p.m.

7. LABOUR RELATIONS – COMMITTEE REPORT

Board Chair Grayston reported that the that the Committee did not meet in November.

8. OTHER

Three other matters were discussed by the Board.

9. UPCOMING DATES/EVENTS

In-Camera Board Meeting – December 16, 2025 – 4:00 p.m. @ DESC

Regular Board Meeting – December 16, 2025 – 6:00 p.m. @ DESC

10. ADJOURNMENT

The meeting was adjourned at 5:40 p.m.

Corryn Grayston
Board Chairperson

Certified Correct:

Jeremy Hunt
Acting Secretary-Treasurer



BRIEFING NOTE

TO: The Board of Education
FROM: Jeremy Hunt, Acting Secretary-Treasurer
RE: **Transportation Department Review**

DATE: December 16, 2025

Purpose

This briefing note is to provide an overview of the Transportation Department Review and seek direction from the Board on the recommendations set out in the attached review.

Background

February 2025

Director Elwood contacted the Association of Student Transportation Services of British Columbia (ASTSBC) for recommendations on transportation experts to conduct a departmental review. A list of contacts was provided and followed up on. One of the recommended experts was School Bus Training Company, which had previously performed a similar review of SD83's transportation department in 2009.

February 2025 Board Meeting

Superintendent Kriger presented a briefing note highlighting the importance of conducting a departmental review to enhance efficiency, service quality, safety, and staffing adequacy. Trustees inquired about potential costs and budget implications. They recommended that Senior Administration:

- explore a contract with a Canadian provider;
- revise relevant policies;
- review walk zones; and.
- ensure user consultation includes staff and families.

Motion 016/2025 carried: *"That the Board of Education approve a review of the Transportation Department through a contracted service agreement with an external transportation expert."*

May 2025 Board Meeting

Director Elwood provided an update to the Board on the awarding of a contract to School Bus Training LLC for their review of the transportation department in June of 2025. The purpose and scope of the review was to focus on the following areas:

- Bus route efficiency
- Dispatch and work assignments
- Mechanic shop and maintenance programs
- Staff workload and assignments
- Fee for service implementation options

Additionally, a survey went out asking parents/guardians, staff, community stakeholders, rightsholders, and students for their input on the transportation department. There were 822 responses to the survey which asked 20 questions. This information was reviewed with the Board at the December 15, 2025 Committee of The Whole.

Summary

School Bus Training LLC conducted their on-site transportation department review for the District from June 1 to 7, 2025. They provided a comprehensive review of the department and focused their efforts on the areas outlined in purpose and scope.

Their report outlined valuable information that staff have found to be insightful and relevant when considering the overall operation of the transportation department. Although most items from the report come with an associated cost to implement and further discussion, a number of items from the report have already been acted on or are in the process. These include the following:

- Ridership Audit
- Dispatch/Cross Training
- Alert System
- Fuel Spill Procedure

Further direction from the Board and input from stakeholders will help prioritize the progressing momentum of this review and staff look forward to implementing additional recommendations identified.

Recommendation

For Board discussion of report recommendations and further direction to staff provided through board motion(s).

Respectfully submitted,

Jeremy Hunt

Jeremy Hunt
Acting Secretary-Treasurer

FINAL REPORT

TRANSPORTATION PROGRAM REVIEW

FOR

**The Board of Education of School District No. 83
(North Okanagan-Shuswap)**

Prepared by:

SCHOOL BUS TRAINING, LLC

**Denny Coughlin
Michael Shields**

7-8-2025

TRANSPORTATION REPORT FOR DISTRICT 83

The purpose and scope of this evaluation involves five areas:

Bus Route Efficiency

Dispatch and Work Assignment Process

Mechanic Shop and Maintenance Program

Staff Work Load and Assignments

Fee for Service

From June 1 to 7, 2025, Denny Coughlin and Michael Shields, School Bus Training, LLC, visited the North Okanagan-Shuswap District 83, in Salmon Arm, BC., with the purpose of evaluating the transportation department as described in our proposal. The staff was prepared and fully cooperated with our requests for information.

After a complete evaluation we will not see the huge dollar savings, since the routing system is very efficient and the shop operates very well. While this site visit has numerous recommendations for improvement in each area, we are concentrating on the operations and management of the department. We provided a considerable amount of both classroom sessions and personal training for the staff.

We feel school bus transportation has the most vulnerable liability for student safety and injury exposure in the district. With this understanding and acceptance of responsibility, this department must have full cooperation of the school system.

Mr. Shields has expertise in routing, and Mr. Coughlin has expertise in maintenance, so these reviews were individual for the most part. The rest of the evaluation had contributions from both individuals, since both have experience and knowledge in management and personnel issues.

EXECUTIVE SUMMARY

This executive summary is a brief of our findings. A full report will follow this summary.

Mr. Shields reviewed the routes as they are scheduled and as proposed for next fall. His initial conclusion was that they were timed very close between the first and second tier with a minimum dead time between. Any changes in bell times would either increase the paid times or create challenges to meet the schedules for reliability. The district staff has done a great job in maximizing the efficiency of the bus routes.

He challenged the staff with questions that are common errors in routing, and they showed their schedules and policies did not fall into the categories he was searching. He was very pleased with the schedules they have been using and have planned for the fall.

There were numerous recommendations for more accuracy, with a major recommendation to compare actual ridership with registered student counts. This may be an opportunity to produce efficiencies in the fall after school starts, and data is collected.

Mr. Coughlin reviewed the shop operations. Two of the employees currently employed were here for our 2008 evaluation. He found the shop to be in very good shape with a good crew and leadership. The service schedules appeared to be up to date, the shop was clean and well equipped, and the individually owned mechanical tool boxes were the best and most equipped ever seen in a district shop. This indicates efficiency, productivity and the correct attitude of the workers.

The procedures were reviewed, and a few suggestions were made to improve the efficiency of the fleet. Research will be done by current staff and leadership for the best results for the district.

There was full cooperation and an open attitude to accept our recommendations for improvement.

While our initial and general assessments were positive in general, the department has some serious vulnerabilities. There are qualified individuals that are extended beyond expectations in responsibilities and duties. We also observed what we believe to be personnel with questionable capabilities to fulfill the job description. This places additional responsibilities on other personnel, creating liability for the district.

The department has key personnel that individually carry responsibilities critical to the transportation department and the safety of the students. This is dangerous to the district, in that if one of these individuals was absent, due to accident, sickness, or leaving the district, there is no one to cover these critical responsibilities. In our opinion, this is the paramount issue to the transportation department and the school district.

We have made a recommendation for the addition of one full-time transportation employee. This addition will eliminate the need for the current 5-hour position. We recommend there be cross training, so every job duty has two qualified individuals to perform that task. We recommend transportation office coverage from 6:00 AM to 6:00PM, and 8-hour shifts for the transportation staff. All staff must be the most qualified persons available.

Summary:

We feel this is a well-led transportation department with great potential to be a model department for the industry. There are changes mentioned that need to be made for the future of the department. We met with Human Resources and feel they understand our concerns and we fully expect they will help the department leadership with the desired improvements.

Full Report for School District 83

Transportation Department

Scope of Work:

1. Bus Route Efficiency

- *Consulting with the director and routing personnel will be necessary to understand the priorities and parameters of the department. An evaluation of the current routes and routing system will be conducted so we understand the current system and the challenges encountered. As the evaluation process progresses, it is expected we may propose ideas to improve the routing system and share the evaluation factors so the current employees can understand the thought process. Designing all new routes is not included in this proposal.*
- *Student safety will be the priority, and cost savings will be estimated as the level of service requested is determined.*
- *This will be a major and extensive portion of the evaluation, since there are a number of factors that must be considered. A final report may be produced after our on-site evaluation.*

Our experience visiting the transportation department of SD 83 was as good as any transportation department we ever evaluated with respect to professional demeanor, friendly atmosphere, and open communications. Inviting a company in to look for efficiencies is commonly an anxious setting. These transportation staff were openly sharing current practices and accepting change suggestions.

The department has documented many processes used in the performance of the jobs. This sets the standard in writing for everyone to follow in the learning process, and as events occur. It is our recommendation to continue developing a written process particularly as new duties or jobs are implemented.

The transportation department has developed clear expectations. Evaluating the success of the expectations may be accomplished by examining data that is already available. A basic expectation is to get students to school safely and on time. We can look at the safety record of our system and the on-time deliveries, or conversely, late buses to school, or the number of afternoon routes running late. This is a simple example of evaluating the department's performance, and we are recommending the department look at these and other expectations the district, parents, and students have and collect data on these criteria. This can be repeated on a regular basis, monthly to yearly, to judge performance. While this does take time to collect, it can be recorded as events occur or reviewing daily logs. This is critical to evaluate where improvement may be needed, and whether the performance is at or above expectations.

We recommend the department review the mission statement and the strategic plan statements of the district to examine how they may better serve these goals for the success of the students. This may influence the policies and procedures of the transportation department.

Routing

Observation of routes: the current routing system and software are very efficient. The distance and length of route travel prohibits and limits reducing the number of routes. With the current bell times and travel distances, drivers commonly have two morning runs and two afternoon runs with a total of 34 buses being used on routes.

Routing system evaluation: the routes seem to be as efficient as possible considering the geography and travel distances. With the current bell times of approximately 6 hours for elementary and 6 ¼ for secondary the space between AM first runs and second runs are properly aligned. The afternoon layovers are commensurate with the differences in length of school day between elementary and secondary school. Substantial savings in dollars may be made in number of buses needed by acquiring the count of actual ridership versus registered riders, documented over several months. If actual ridership is far lower than actual students riding, it may be prudent to combine routes. It is important to mention that this is conjecture and speculation based on our experience that commonly more students and families register than normally ride the buses. Until actual ridership can be gathered and routes analyzed the cost savings are undeterminable.

It is our desire to recommend a system that will uncover the students that are registered and not make use of the school bus service. The district is reserving a seat that remains empty, when they may save efficiency if another student could be using the seat. It is unknown what percent of the students fall into this category, but if this data was known, there is a possibility that buses may be rerouted, and savings of routes may be possible. We have discussed possible methods of accountability of students with the district. There will be either a cost of material and technology involved, or additional time involved by the drivers and staff.

2. Dispatch and Work Assignment Processes:

- *An evaluation and assessment of the current dispatch procedures will be performed. Recommendations for the processes of assigning work and communications with the drivers will be made.*
- *Recommendations for the dispatch position will be made after understanding the current process and the demands of the position. This will need to include a number of factors, such as*

hours of operation, all duties expected of the position, and communications required of the public and drivers, along with numerous other factors.

Note: Within the school bus industry, dispatch is a term for the position that is used to communicate with the drivers, make assignments as necessary, assist with difficult driver situations, drive bus in emergencies, and a variety of other assignments. This is (with rare exception) always considered a transportation position. We understand in your system; dispatch is considered a clerical position. These clerical personnel may have office skills and phone experience, but seldom have experience driving a school bus, maneuvering a treacherous roadway with the responsibility of 50 students aboard, or being the only authority to discipline difficult unruly students, while being expected to operate a large school bus safely. We strongly feel it is negligent to expect clerical staff to professionally assist a school bus driver in a difficult situation when they cannot relate, or have experience, with the driver's situation. We strongly feel these Dispatch/Transportation Assistant positions should be filled with qualified individuals with school bus driving experience.

The Dispatch office is (minimally) proficient at times, in terms of driver needs being addressed and met when the office staff shifts are not aligned with the driver's schedules. When the office is closed, drivers are expected to call the cell of the lead hand in the shop or the transportation manager's cell. We see this as a possible risk area in the part of the district. Expanding the hours of staff to cover 6 AM to 6 PM may mitigate and reduce this exposure. This will provide transportation office coverage for nearly all normal route schedules. We recommend having 8-hour shifts for the two individuals covering and responding to drivers, parents, school staff, phones, radios, routing needs, and other duties required and assigned. Both individuals should be proficient in routing software,

covering trips, assigning spare buses, assigning drivers, responding to phone calls, and driving school bus and other district vehicles. This will allow for lunch break coverage and allow for uninterrupted time to perform the computer work for the shop operations, assigning field trips for the week ahead, and other duties required. We expect the implementation of two qualified individuals in these positions will eliminate the need for a clerical position in the transportation office.

The process for tracking buses and drivers is in place with the use of the program Traversa. This is a very good system that allows the dispatcher to locate the exact location of any bus at any time.

There is a roll out feature that identifies drivers reporting to work and must be continuously monitored to identify drivers that may report late to work or not at all. “No shows” has not been a huge problem but we did see it occur. When discovered, the shop lead hand pre-tripped the school bus, and a mechanic was assigned to drive the route. The route ran about 30 minutes late, resulting in very few students (if any) being at the bus stops. The district has a parent call system when route variances occur. This is a good system that communicates with the parent. It is not always possible for the parent to communicate with the student if the parent is not home. We cannot emphasize the large safety risk and liability for children the district is exposed to, that could occur when a dispatcher overlooked, or didn’t see a bus not leaving on time, or at all. We are recommending an additional program or process that will set an alarm or warning if a bus is not checked in by an assigned time. This would give the dispatcher the ability to investigate and make assignment with a substitute driver.

A duty in the transportation office is to schedule field trips and perform the billing. The current charges are \$1.10 per kilometer and \$35 per hour for the driver. These numbers have been used for many years, and we are requesting they be reviewed. We are asking the shop to determine the cost per kilometer to operate the school buses and a review of the driver’s

actual costs with benefits to be calculated. It is expected these charges will be adjusted as the calculations are completed. Annual adjustments may be necessary as contracts and operating costs change.

We examined the job descriptions (duties) within the department, and it appears some of the qualifications were tailored to previous individuals, the qualifications were very specific. Since individuals with these qualifications from within the district or from the public are nearly impossible to find, we recommend the qualifications be reviewed and modified to be more job specific to meet the department needs.

We are strongly recommending changing the title of Transportation Operations and Training to Dispatcher/Transportation Assistant and the addition of another Dispatcher/Transportation Assistant position and evaluating the duties of the Transportation Admin Assistant and the Transportation Operations and Training position. Since both new positions have similar duties, serving AM or PM shifts, the duties will be virtually the same. In an effort to cross train and cover for absences, leaves, or substituting for a bus route during driver shortages, they must be able to perform all duties.

We recommend the transportation manager, the transportation operations and training person, and the HR department review and modify these job descriptions, since they are most familiar with the current duties and what is required in the future. We strongly feel this task is critical to the success and future of the department. This will take concentrated time from the participating parties, and careful consideration must be given to each characteristic and duty.

It may be suggested to use the two current job descriptions as a guide and add to the duties as desired, and as additional needs are identified.

It will be prudent to estimate the frequency and time required for the various tasks, on a daily, weekly, or monthly basis. This may guide the duties assigned to each individual after the positions are in place.

It is again recommended that written processes and procedures be developed for each task. This may be in the future, as time permits.

Hours of operation in the dispatch office are strongly recommended 6 AM to 6 PM. We suggest the dispatch closing and shop closing be coordinated with the last mechanic and the dispatcher leaving together, to ensure the safety of both individuals closing the gate. This would require a time change for the mechanic of 30 minutes, and the recommended 6 pm closing for the dispatcher.

3. Mechanic Shop and Maintenance Program:

- *A complete evaluation of the shop will be conducted, including the work load, the service schedules, the assignment process, tools provided, the shop layout and other factors.*
- *Recommendations will be made to make the best use of the talent and responsibilities, expedite the tracking of the work assignments, account for the technician's time, parts ordering and storage. The computerized system will be examined for utilization of work assignments and tracking costs.*

This shop is very unusual for school transportation. A true Preventative Maintenance (PM) program will replace items before they fail, as is the case in this shop. This is necessary for long haul trucking, in that if a part fails far from the home shop, it will be very expensive to repair, since there will be down time, possible expensive towing charges, product perishing or late delivery charges, and extra time for the driver. This department is an exception to most school bus shops and does a true PM program. This practice greatly assists in student on-time delivery and safety.

The school bus industry is not as diligent with this practice since the school buses operate close to the home shop, can substitute another school bus rather easily, and repairs may be done by the district shop. Due to these conditions, most school bus fleets don't replace many components until they fail, resulting in additional breakdowns, poor service, exposure to liability, tarnished reputation, and additional maintenance costs.

This shop is very diligent with inspections, and many repairs are completed with the replacement of worn (but not yet failed) parts that are predicted to fail in the future, eliminating service calls and further down time. This practice increases the reliability of the fleet.

While this practice may seem like an additional cost to the fleet, the life cycle of the replacement parts commonly extends beyond the extended life of the bus, eliminating the need to replace the item again. This PM practice results in reduced road failures which enhances on time delivery of students.

The location of the parts room is convenient for the mechanics. The parts are well organized with shelves and bins easily identified with a good numbering system. The parts stocked serve the fleet very well. The lead-hand understands the desired on-hand quantities and ordering process. The inventory is current as obsolete parts have been eliminated.

The shop is divided into two areas, with the larger area using two inground adjustable hoists and a workable bus stall in front of one hoist. This is convenient for faster or minor repairs where a hoist is not required. In front of the other hoist is an area sufficient for working on smaller and seasonal equipment. A wall divides the shop providing a single stall on the far side. This stall is equipped with a 4-post-portable hoist for complete versatility. In front of the bus area is a small car type hoist that

has adapter brackets to lift various types of equipment. This appears to be very efficient.

One of the in-ground hoists is not able to move the front cylinder, limiting the versatility to lift additional wheel base vehicles. We recommend this be repaired to allow better usage of the lift. There is a request for another set of portable 4-post lifts. This will require an expenditure of around \$80,000. The versatility of this type of lift is very good. I would estimate the life expectancy in this use to be over 20 years. Lifts, in my experience, are a big-time saver, as well as much easier on the technician's body, thus reducing time off injuries. This request will be more critical when the lead hand spends more time in the shop, and less time on clerical duties.

The manpower in the shop is currently sufficient to keep the fleet running. The additional equipment needing service, that is the responsibility of the shop, could be better scheduled with additional hours in the shop. It is our recommendation that the equipment that is seasonally parked be scheduled and serviced as soon as possible. If there are parts that need to be special ordered, they are in place before it is stored for the off season and assured to be ready when called for next season. This policy pertains to all the additional equipment serviced. The lead hand has taken responsibility for much of this equipment. It is the goal to have the lead hand spend 4 hours of the day in the shop. This is expected to help with the equipment service and repairs. This means that much of the recording computer work will be transferred to the transportation office.

The "A" inspections are very comprehensive. Repairs are completed as defects are found. The PM services are scheduled for a 4-week schedule for each school bus. I have been informed the Provencial Inspectors require not more than 6 weeks between "A" inspections. I am recommending the schedule be extended to a targeted 5-week program. I do not see this as sacrificing safety and will still give five days cushion to the next scheduled inspection. Conversation with the shop personnel

agreed with this recommendation. This time savings can be used to assist with the maintenance of the white fleet and the equipment servicing and repair.

The "B" inspections include an "A" inspection along with an engine oil change and other services. These vary by bus brand and models. The variances for the buses are well posted for the technicians.

The "C" inspection is an annual inspection that is the most extensive. Each of these inspection categories has a check sheet that must be completed by the mechanic, signed and filed. These inspection forms and corresponding work orders are recognized as a legal document, for any accounting, historical research, follow up, or accident investigation.

The shop is exercising good practices by using premium synthetic oils in the small equipment and portions of the school buses. This increases the fuel efficiency in cold weather and extends the life of the components.

The fueling system uses a divided above ground tank for diesel and unleaded fuels. Dispensing is computerized using a Pro-Fuel system that appears to work well. The mileage is input at the time of fueling and the amount of fuel is automatically recorded and downloaded to the shop computer. This provides precise accountability for fuel usage. While fuel spill mitigation materials are on site, we would recommend adopting fuel spill procedures with written documentation that would be in line with provincial and local regulations.

The fuel is purchased from the COOP. My inquiries into the process of bidding and purchasing the fuel were responded to by the Director of Operations.

The fuel is bid every two years by the district. There is a price that coordinates a constant amount above the fuel pipeline (head) price. The markup is constant, but the cost per liter will vary with each delivery depending on the pipeline price of fuel.

I suggested bidding fuel in cooperation with the city shop, or other school districts. Combining expected or assured volumes may lower the bid price considerably. This suggestion was readily accepted by Travis Elwood.

In a session we looked at the billing rate for the shop. It has been set at \$40.10 per hour for many years. Using general numbers (not completely researched or accurate) we listed the technicians wages and estimated the health insurance costs, uniforms, district contributions to retirement, costs of workers' compensation, shop utilities, paid time off, and other factors and estimated the mechanics time at about \$90 per hour. We recommend the department repeat this exercise with more precise numbers applied.

It is the department's desire to have the lead-hand account for about 4 hours per day working on equipment or school buses. This would allow him 4 hours per day to assign work, handle parts ordering and check in, oversee the fuel system, and other shop office duties. This would account for about \$360 per day of productive accountable work.

This shift of duties will move much of his computer clerical input work into the transportation office. This will require the transportation staff to learn those duties and have the ability to be proficient and accurate in the input processes. For this to occur, the duties must be reviewed, and training must be provided for the appropriate person(s). It is expected this will **not** be a 4-hour addition to the work load, with the actual time required dependent on the qualifications and abilities of the transportation staff person.

Training is a serious issue with this industry. Nearly every department I have worked with has a deficiency of training. Training technicians is the best money you can spend for payback and to improve efficiency. I recommend department management allows two hours per month for each mechanic with training to increase their knowledge. There may be a cost to bring in a bus vendor, parts supplier, equipment manufacturer,

or other individual. Not only will it increase their knowledge and proficiency but improve the morale of the group.

██████ (lead-hand) makes nearly all the assignments of the work. When he is not present ██████ generally takes over. ██████ is admittedly not comfortable with the assignment. I coached both individuals that ██████ has the responsibility to explain to ██████ his thought processes and assure ██████ understands so he is more comfortable, confident, and will make similar decisions when required. Due to the maturity, quality, and attitudes of the mechanics, it may be appropriate on occasion to make group decisions. I recommend ██████ facilitates discussion with the mechanics on a regular basis as appropriate policy decisions are made.

One of the technicians was out with a back injury during our site visit. He was able to attend a training session we conducted. While the shop is currently about equally staffed to the workload, I feel the shop is extremely vulnerable to serious manpower shortage if one individual is absent for an extended period of time, either through injury, accident, sickness, retirement, or other reasons, long term or permanently. While I am not predicting or expecting such an event, it is entirely possible, and alternate solutions should be considered. I do not have a solution at this time; I would suggest the department look at other personnel within the district with some mechanical experience that may be qualified to fill in with some of the duties. Another option may be to canvass the community to search for someone that may be available for a period of time if needed. Another option may be to implement overtime for the existing technicians. This is an issue I recommend the department examine.

I had conversation with the shop about their tire program. I suggested they look at a tire machine to change the tires on the rims. Modern machines make this work relatively easy. It's swapping the tires on the bus that is more labor intensive. I expect they will do their analysis to determine the best process for the shop.

There is an upcoming challenge for the shop with the implementation of the new maintenance program from Tyler Technologies. While the system is loaded, the complete transition to the new system will require additional time and patience. I recommend the department provide the support required to the shop, both in time and training, to learn and implement the program completely.

In summary, we were very impressed with the shop and the operations. [REDACTED] lead hand, has done a good job organizing and managing the work load and the processes. He is well respected by his subordinates.

4. Staff Workload and Assignments:

- *This recommendation will be tied into the previous two sections. As we understand the duties of the current staff, and the work load and consider our suggested changes, final recommendations can be made for the department personnel to perform more effectively. This may include a shifting of responsibilities, hours or duty adjustments, possible addition or deletion of work hours, equipment upgrades, and other unforeseen changes at this time.*

We will review and recap the primary points of the recommendations described in the previous sections.

For the transportation manager, the job duties are daunting and voluminous, making them almost impossible to complete. There is relief that can occur with the addition of another person in the transportation office. We are proposing the current Transportation Operations and Training position, a very capable and valuable employee be moved to a Dispatch/Transportation Assistant position, with the addition of another similar position. These two positions can take some of the work load off the manager.

We have discussed the duplication of the duties of the dispatch/transportation assistant positions. We feel there are duties of the transportation manager that must be shared with the new positions to service the district in the transportation manager's absence. This training will allow a portion of the managers work load to be shifted to the dispatch/transportation assistance duties as necessary. Currently there are insufficient staff to effectively cover all the tasks and responsibilities expected. If any of the staff need or have time off (illness, accident, or unforeseen absence) there presently is not the coverage for sustaining service in the shop or transportation office. This lack of a backup plan creates serious safety, liability, performance, and financial exposure for the district, schools, and students. While we feel the transportation manager is the right person in this position, we fear long term 'burn-out' from the individual. We saw no indication of that at this time, but we feel now is the time to mitigate this possibility.

It is our recommendation to have two dispatch/transportation assistant positions assigned to transportation. Their qualifications and duties will be similar, and assigned responsibilities may vary after positions are filled. Both of these positions must require the proper licensing and the ability and willingness to drive school routes.

[REDACTED]

[REDACTED] The job description of the Transportation Admin Assistant does not fulfill the duties necessary to qualify for the proposed Dispatch/Transportation Assistant.

We have discussed cross training that must occur to prevent a breakdown in operations if one individual of the team is absent long term. Having the proper individuals with the necessary requirements, abilities, experience, and training is critical to the district's responsibility to provide a safe, proficient, and reliable transportation department.

We have recommended the transportation manager, and an HR representative or dispatch/transportation assistant visit each site either monthly or semi-monthly to meet with the drivers. This is to create a better relationship with drivers and get to know them personally. This could be accompanied by rolls and coffee to relax the atmosphere. This would be a time to share information about the district, department and individuals and answer any questions or concerns they may have. This may lessen the complaints brought forth to the union or in grievances.

We provided a variety of training for the staff and individuals while on site. This was not planned ahead of time, but it was appropriate to the needs of the department.

We conducted a class on **Personal Management**, which included characteristics that managers and leaders need to possess to be effective and respected managers, leaders, and employees.

A class on **Hiring the Right People** discussed the various steps in the hiring process with an emphasis on, the often short-cut, interview process.

We did a class on the importance and value of an effective **Performance Evaluation**. We encouraged the development of a custom evaluation, approved by human resources, that covers the duties of each particular job, and how the individual performs the tasks. This provides an opportunity to communicate effectively and honestly with the subordinate.

The final session, (all designed for 1 hour) was on **Diversity and Conflict**. This is to help staff understand the diversity that exists among all of us and how this diversity may cause conflict due to our differing cultures and values. This teaches how to identify the differences and understand why conflicts may exist. After we understand the other person, we may have an opportunity to be understood and resolve the conflict.

There were dozens of individual teaching and coaching sessions with staff on topics as they were encountered. Together we have 100 years of experience and 100 years of stories to tell about difficult, pleasant, learning, problem, and successful experiences. We were anxious to share them as it was appropriate. We hope this experience was invaluable to the staff as a learning opportunity.

5. Fee for Service Implementation:

- *This item will require an understanding of the make-up of the district population. We will require input from the department and district concerning the needs and goals of the district.*
- *This evaluation and recommendation will have many factors in the formula and may be presented with options for the district to consider.*

This topic was difficult for us to evaluate. There was a district parent survey that was sent to a portion of the population before our site visit. We have not seen the results of that survey.

Since we are not familiar with the culture of the student population and the percentage of various income levels within the district, it is difficult to know what the acceptance levels of fee for service would be.

We had no understanding nor communications with the district about what the goals or expectations of the amounts were desired and what the income would be used for.

We have reviewed the results of the BC. Student Transportation Survey, 2024, and while most districts are not using Fee for Service, the districts that are, have drastically varied methods of collection. There is no standardization identified at this time.

We feel it is prudent to not offer an opinion or recommendation without direction and understanding of the desired outcomes. Initiating fee-

based services can be very contentious and problematic with parents. It is recommended the parent survey be studied to understand the majority opinions. This may give the Board an understanding of the acceptance or rejection of the program.

It may be beneficial to indicate the amount of funds that are desired to be collected, and from whom it would be collected. The desired usage of the funds and the targeted students that would benefit from the program may be communicated.

There may be other issues to be addressed. It is our opinion the more information that is communicated to the parents and the public, the better the outcome will be long term.

Additional observations

We discovered items that were not part of the titles we proposed. We feel there are items that affect the operations of the department that deserve comments.

It was obvious to us that the unions are very strong in the district. We have both been successful in working with unions, but it often needs diplomacy and inclusion from the unions and human resources to resolve issues.

We believe when there are issues from the drivers, they should address their concerns with the transportation manager. It would be reasonable for the manager to consult with human resources if there are questionable procedures or contract interpretation involved.

It appears to us the union would like to be first informed so they can address driver issues. We understand why the union wants to be first involved, but we believe the response should be to the union from any district department to direct the union to address the issues with the transportation manager, before it is addressed by any other department.

Exceptions to the process encourages the union and hijacks the authority of the transportation manager, making management of the department more difficult and less effective.

With the experiences we both possess, and working as an expert witness in legal cases involving school districts and school buses, we encourage the school district to expedite the recommendations we are offering. The exposure to liability and student injury is an issue we desire to mitigate for District 83 as soon as possible.

Events can occur at any time without warning; there are no assurances. Our goal is to provide sound advice with the knowledge and experience we have to assist SD 83 to provide the safest and most efficient transportation system for the students and families you service at the earliest time possible.

School Bus Training, LLC would like to express our appreciation to the administration and employees of the district for their cooperation and the information they freely offered to us. Our experience with the district was positive in every way. It is our goal to provide the best information for the district to build and maintain a model transportation department.

If there are services desired in the future, we would be anxious to serve the district further.

Respectfully Submitted,

School Bus Training, LLC

Denny Coughlin, President

Michael Shields



BRIEFING NOTE

TO: The Board of Education **DATE:** December 16, 2025
FROM: Jeremy Hunt, Acting Secretary-Treasurer
RE: **2025-26 Amended Budget Priorities**

Background

The Board was presented with a number of recommendations during the 2025-26 Annual Budget process to consider implementing for the upcoming school year. At the time, the financial position of the District coupled with the uncertainty around the September 2025 enrollment projections led to a recommendation to hold off on a number of initiatives.

Information

As we now have clarity on the financial position of the District, with an unrestricted surplus from the 2024-25 year amounting to \$1,415,963 and confirmation of stable student enrollment, it would be appropriate to revisit the previously discussed initiatives that the Board held off on.

The initiatives discussed include the following:

- Principal teaching time reduction
- Position of Special Responsibility (POSR)
- Library clerks

Additionally, it has been brought forward at previous Board, Committee of The Whole, and Budget Advisory Committee meetings that additional supports for students is a priority initiative of several stakeholders and this would be best supported through additional Certified Education Assistants (CEA). To this end, costing for additional support is included for consideration in the following package.

Supporting Documentation

- Budget Priorities presentation

Recommendation

That the Board of Education of School District No. 83 approve each of the presented initiatives through board motion, respectively.

Respectfully submitted,

Jeremy Hunt

Jeremy Hunt
Acting Secretary-Treasurer

BUDGET PRIORITIES: Hold

Recommendation: Hold these priorities until October/November discussions once enrolment and 2024/25 financial position confirmed.

Annual Cost:

Initiative	Detail	Amount
Principal Teaching Time	Reduction to single administrators teaching time.	\$200,000
Positions of Special Responsibility/Substitute Days	Middle/Elementary Position of Special Responsibility and/or substitute days.	\$80,000
Library Clerk	Additional library clerk allocation.	\$100,000

January to June Cost:

Initiative	Detail	Amount
Principal Teaching Time	Reduction to single administrators teaching time.	\$120,000
Positions of Special Responsibility/Substitute Days	Middle/Elementary Position of Special Responsibility and/or substitute days.	\$48,000
Library Clerk	Additional library clerk allocation.	\$60,000

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1

RISK ASSESSMENT – Principal Teaching Time

- Request of NOSTA and school principals over the past several years.
- Increased administrative time results in additional teacher time in schools.
- The school principal is often unavailable to staff and parents while they are in their classrooms teaching.
- Increase of 0.1 FTE would have a very small impact on both teaching time and overall administration and the workload of school principals. This small change would support the overall well-being of school principals.

Impact Categories	Insignificant	Minor	Moderate	Major	Catastrophic
Financial	The financial impact of the decision is less than \$50,000	The financial impact of the decision exceeds \$50,000, but less than \$150,000	The financial impact of the decision exceeds \$150,000, but is less than \$250,000	The financial impact of decision exceeds \$250,000, but is less than \$500,000	Financial impact of the decision exceeds \$500,000
Comments &/or Mitigation Strategy	1. This will present an ongoing cost that will need to be absorbed each year through the annual budget. 2. It may be possible to address this need during the amended budget process, which is a strategy we have used multiple times in the past.				

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2

RISK ASSESSMENT – Positions of Special Responsibility

- Currently no such positions at Elementary Schools
- These positions could be of significant support for principals who are sole administrators in a school.
- Further exploration needed to identify if POSR or additional teacher on call support would most beneficial.

Impact Categories	Insignificant	Minor	Moderate	Major	Catastrophic
Financial	The financial impact of the decision is less than \$50,000	The financial impact of the decision exceeds \$50,000, but less than \$150,000	The financial impact of the decision exceeds \$150,000, but is less than \$250,000	The financial impact of decision exceeds \$250,000, but is less than \$500,000	Financial impact of the decision exceeds \$500,000
Comments &/or Mitigation Strategy	<ol style="list-style-type: none"> 1. There is not currently a consensus on what these positions could look like in elementary schools. 2. It may be prudent to pilot this concept in a few elementary schools using two different models to determine their effectiveness, which would reduce the cost significantly where the impact would be less than \$50K. 				

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3

RISK ASSESSMENT – Library Clerk Time

- Number of positions in place across the District.
- This is a request that NOSTA has supported in the past
- This time would create greater efficiency in school libraries.

Impact Categories	Insignificant	Minor	Moderate	Major	Catastrophic
Student Outcomes	Immaterial impact on student learning and achievement.	Student learning and achievement will show some improvement	Parental advocacy is presented regarding the initiative.	Overall student learning and achievement will be directly impacted and supported.	A significant improvement to student learning and achievement will occur.
Comments &/or Mitigation Strategy	<ol style="list-style-type: none"> 1. The overall impact of a reduction to teacher librarian time and an increase to library clerk time will need to be monitored. 				

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4

BUDGET PRIORITIES: New

Recommendation from previous Board, Committee of The Whole, and Budget Advisory meetings to add additional Certified Education Assistants.

Initiative	Detail	Amount
CEA Positions	Additional CEA positions cost per year based on a 27.5 hour week.	\$42,000
CEA Positions	Additional CEA positions cost starting in January 2026 (6/10 months) based on a 27.5 hour week.	\$25,000

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5

RISK ASSESSMENT – Additional CEA Time

- Additional CEAs to support student learning and growth
- Request from several stakeholders throughout budget consultation and meetings
- Support families of children with learning differences as they transition into our schools

Impact Categories	Insignificant	Minor	Moderate	Major	Catastrophic
Student Outcomes	Immaterial impact on student learning and achievement.	Student learning and achievement will show some improvement	Parental advocacy is presented regarding the initiative.	Overall student learning and achievement will be directly impacted and supported.	A significant improvement to student learning and achievement will occur.
Comments &/or Mitigation Strategy	1. In the absence of government funding, the District is required to absorb these costs. 2. Continued advocacy to hold the government accountable for a campaign promise is necessary. 3. Annual review of CEA positions throughout District to ensure support is prudently allocated.				

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6



The Board of Education of School District no. 83

Item 10C

BRIEFING NOTE

TO: The Board of Education **DATE:** December 16, 2025
FROM: Corryn Grayston, Board Chair
RE: **Board Governance Policies (Section 100) – For Discussion**

Background:

One of the key responsibilities of the Board of Education is to provide direction through its policy process. These include planning, developing, implementing, and evaluating policy.

Summary:

Section 100 – Board Governance and Foundational Commitments of the Policy Manual are policies which are connected to the roles and responsibilities of the Board and Superintendent, as well as how the board conducts its business and the expectations it has regarding the conduct of students and employees within the district.

Information:

An election will be held in the fall of 2026 which could see changes to the existing board. Earlier in the year, Vice-Chair Krebs suggested that the Board spend time reviewing the policies under Section 100 of the policy manual to ensure they are current and up to date. This work is likely best suited for a future Trustee Education Session.

Respectfully submitted,

Corryn Grayston

Corryn Grayston
Board Chair



The Board of Education of School District No. 83

BRIEFING NOTE

TO: The Board of Education **DATE:** December 16, 2025

FROM: Jeremy Hunt, Acting Secretary-Treasurer

RE: **Salmon Arm Secondary Trail Project – Property Bylaw No. 3-2025 – Third & Final Reading**

Purpose

This briefing note is to provide the Board of Education of School District No. 83 with information to support the third and final reading of Property Bylaw No. 3-2025 for the Statutory Right-of-Way (SRW) regarding the City of Salmon Arm and Shuswap Trail Alliance greenway trails project at Salmon Arm Secondary. The SRW is required to be approved by Bylaw and registered with the Land Titles Office.

Background

The Board passed the first and second readings of Property Bylaw No. 3-2025 at its November 18th, 2025 Regular Meeting. The SRW is regarding the proposed trail on the western edge of the Salmon Arm Secondary property, following the existing social trail in place and tied into the existing City of Salmon Arm trail on 20th Avenue NE. This is illustrated in the supporting document: Statutory Right of Way Plan – EPP148507.

Once the Property Bylaw for the SRW is passed, District staff will work with City of Salmon Arm staff to enter into a Right-of-Way agreement for trail use.

Supporting Documentation

- Property Bylaw No. 3-2025
- Statutory Right of Way Plan – EPP148507
- City of Salmon Arm – Sample ROW Agreement for Trail Use

Recommendation

That School District No. 83 Property Bylaw No. 3-2025 be read a third time, passed and adopted this 16th day of December, 2025.

Respectfully submitted,

Jeremy Hunt

Jeremy Hunt
Acting Secretary Treasurer

PROPERTY BYLAW NO. 3 - 2025
THE BOARD OF EDUCATION OF SCHOOL DISTRICT NO. 83

WHEREAS pursuant to Section 96 (1) of the *School Act*, “land” includes any interest in land, including any right, title or estate in it of any tenure;

NOW THEREFORE be it resolved that the Board of Education of School District No. 83 grant a Statutory Right-of-Way on that portion of the property owned by the Board and described as:

Facility #08383035 – Salmon Arm Secondary School, located at 1641 30th Street NE,
Salmon Arm, British Columbia

Legal Description: Lot 1, Plan KAP50046, Section 24, Township 20, Range 10, Meridian
W6, Kamloops Div of Yale Land District, Part 1 of 2 See 04460.0101 (PID: 018-309-861)

to the City of Salmon Arm as outlined in **bold**, as per the attached Statutory Right-of-Way plan.

THAT the Board’s signing officer be authorized to execute the Statutory Right-of-Way.

AND FURTHER THAT the Statutory Right-of-Way will have no adverse effect on the use of the site by the District.

READ A FIRST TIME this 18th day of November, 2025.

READ A SECOND TIME this 18th day of November, 2025.

READ A THIRD TIME, passed and adopted this ____ day of _____, 2025.

Board Chair

Acting Secretary-Treasurer

I HEREBY CERTIFY this to be a true and original School District No. 83 Property Bylaw No. 3-2025 adopted by the Board the ____ day of _____, 2025.

Acting Secretary-Treasurer

SURVEY PLAN CERTIFICATION
PROVINCE OF BRITISH COLUMBIA

PAGE 1 OF 2 PAGES

Your electronic signature is a representation that you are a British Columbia land surveyor and a subscriber under section 168.6 of the *Land Title Act*, RSBC 1996 c.250. By electronically signing this document, you are also electronically signing the attached plan under section 168.3 of the act.

Mark Mason E34PZ9	Digitally signed by Mark Mason E34PZ9
	Date: 2025.09.23 12:00:41 -07'00'

1. BC LAND SURVEYOR: (Name, address, phone number)

Mark R. Mason, BCLS
201-371 Alexander St.

Salmon Arm

BC V1E 4N5

☐ Surveyor General Certification [For Surveyor General Use Only]

2. PLAN IDENTIFICATION:

Control Number: **175-865-4041**Plan Number: **EPP148507**

3. CERTIFICATION:

☒ Form 9☐ Explanatory Plan☐ Form 9A

I am a British Columbia land surveyor and certify that I was present at and personally superintended this survey and that the survey and plan are correct.

The field survey was completed on:	2025	August	25	(YYYY/Month/DD)	The checklist was filed under ECR#:
The plan was completed and checked on:	2025	September	23	(YYYY/Month/DD)	295524

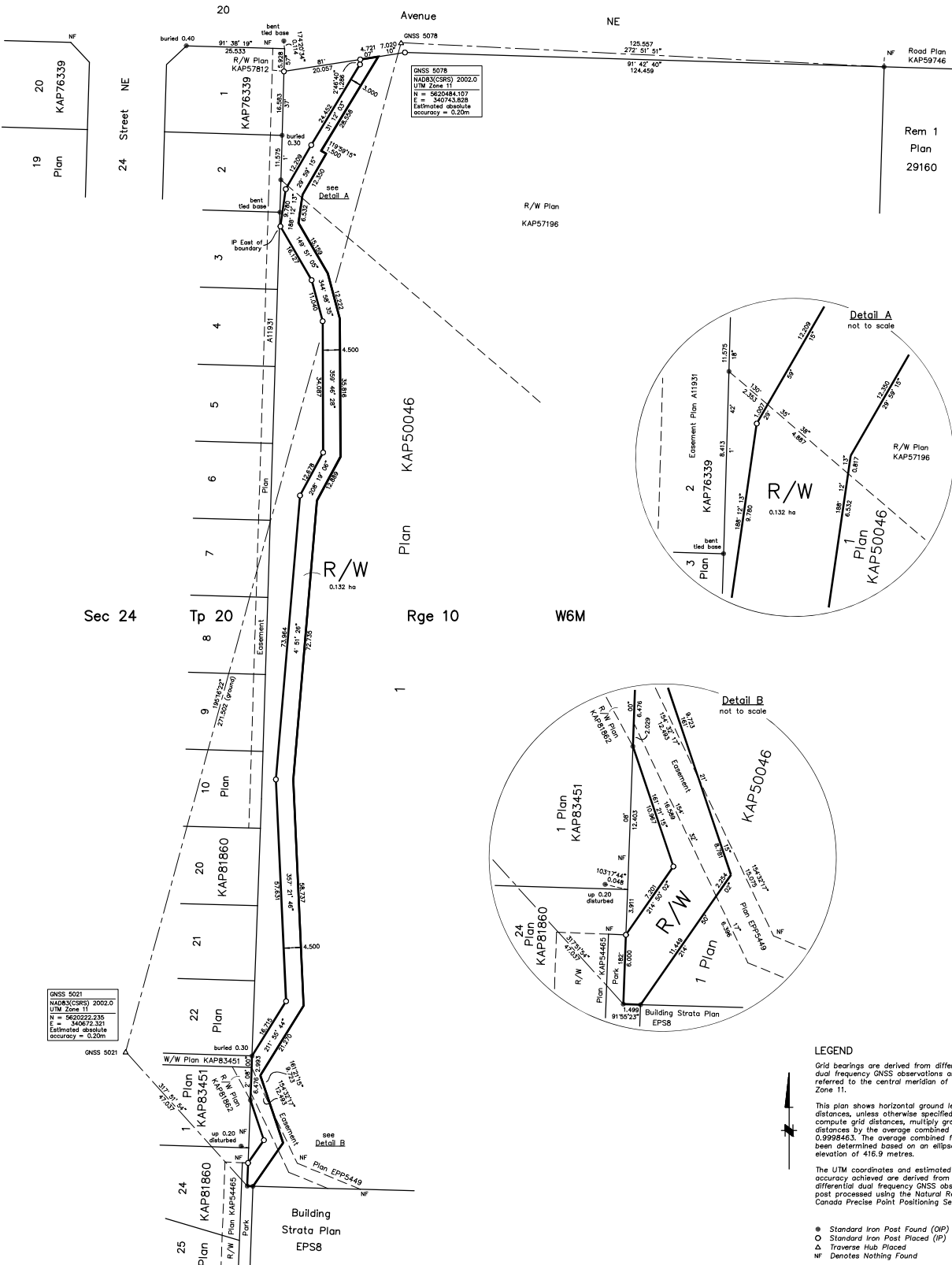
☒ None ☐ Strata Form S

☒ None ☐ Strata Form U1 ☐ Strata Form U1/U2
Arterial Highway ☐Remainder Parcel (Airspace) ☐4. ALTERATION: ☐

Statutory Right of Way Plan
in Part of Lot 1,
Sec 24, Tp 20, Rge 10,
W6M, KDYD, Plan KAP50046

Pursuant to Section 113 of the Land Title Act
BCGS 82L.074

All distances are in metres.
The intended plot size of this plan is 560mm in width by 864mm in height (D size)
when plotted at a scale of 1:500



TERMS OF INSTRUMENT - PART 2

STATUTORY RIGHT-OF-WAY - PUBLIC TRAIL

THIS AGREEMENT dated for reference the 1st day of November, 2023.

BETWEEN:

(the “**Grantor**”)

AND:

CITY OF SALMON ARM

Box 40, 500 2 Avenue, NE

Salmon Arm, British Columbia V1E 4N2

(the “**Grantee**”)

Background

- A. The Grantor is the registered owner of lands and premises located in the City of Salmon Arm, British Columbia, more particularly known and described as:

(the “**Lands**”).

- B. The granting of this Statutory Right-of-Way is necessary for the operation and maintenance of the Grantee’s undertaking.
- C. At the request of the Grantee, the Grantor has agreed to grant to the Grantee a Statutory Right-of-Way encumbering the title to the Lands on the terms and conditions set out in this Agreement.

Terms of Agreement

In consideration of TEN DOLLARS \$10.00 and other good and valuable consideration now paid by the Grantee to the Grantor (the receipt and sufficiency of which is hereby acknowledged), the parties hereby covenant and agree as follows:

1. The Grantor hereby grants and conveys to the Grantee and its servants, agents, workmen, contractors and all other persons acting for and on behalf of the Grantee, the full and free right in perpetuity to enter on to and use that portion of the Lands shown in bold outline on a Statutory Right of Way Plan in Parts of Lots

and assigned Plan EPP132980 (the “**Right-of-Way Area**”), for the following purposes:

- (a) to construct, maintain, repair and replace from time to time a public, pedestrian, and bicycle pathway and other accessories associated with a public trail including but not limited to signs, park benches and garbage/recycling containers (the “**Public Trail**”) on and within the Right-of-Way Area;
- (b) to enter onto the Right-of-Way Area from time to time together with vehicles, machinery and equipment as the Grantee may reasonably require to construct, inspect, maintain, repair and replace the Public Trail;
- (c) to use the Right-of-Way as part of a public pathway system that passes through lands lying adjacent to the Lands and to permit members of the general public to cross over the Right-of-Way Area on foot or on bicycle from time to time; and
- (d) to regulate, administer or prohibit use of the Public Trail by members of the general public on foot, bicycles, scooters for disabled persons, wheelchairs, strollers, for pedestrian and bicycle access as set out above.

2. The Grantee covenants with the Grantor:

- (a) that upon construction of the Public Trail, and except with respect to the maintenance, repair and replacement of the Public Trail from time to time, to restrict usage of the Right-of-Way Area to recreational pathway purposes only. Without limiting the generality of the foregoing, no motor bikes, all terrain vehicles or any other vehicles, or horses shall be permitted within the Right-of-Way Area. Nothing herein contained, however, shall prevent the use of wheelchairs or other means of transport for use by persons with disabilities within the Right-of-Way Area;
- (b) not to bury any debris or rubbish of any kind in excavations or backfill, and will remove shoring and like temporary structures as backfilling proceeds;

- (c) to thoroughly clean all of the Lands to which it has had access hereunder of all rubbish and construction debris created or placed thereon by the Grantee, and will leave the Lands in a neat and clean condition;
- (d) as soon as weather and soil conditions permit, and so often as it may exercise its right of entry hereunder to the Lands, replace the surface as nearly as may be reasonably possible to the same condition as it was prior to such entry, in order to restore the natural drainage of the Lands to the Grantor;
- (e) to carry out all work in a proper and workmanlike manner so as to do as little injury to the Lands as possible;
- (f) make good at its own expense all damage or disturbance which may be caused to the surface soil of the Lands in the exercise of its rights hereunder;
- (g) as far as reasonably possible, restore any fences, lawns, flower beds, trees or other surface growth at its cost as nearly as may be reasonably possible to the same condition as they were in prior to any entry by the Grantee upon the Lands of the Grantor outside of the Right-of-Way Area; and
- (h) at all times maintain the Right-of-Way Area in a manner such that it does not detract from the aesthetic appeal of the Lands generally.

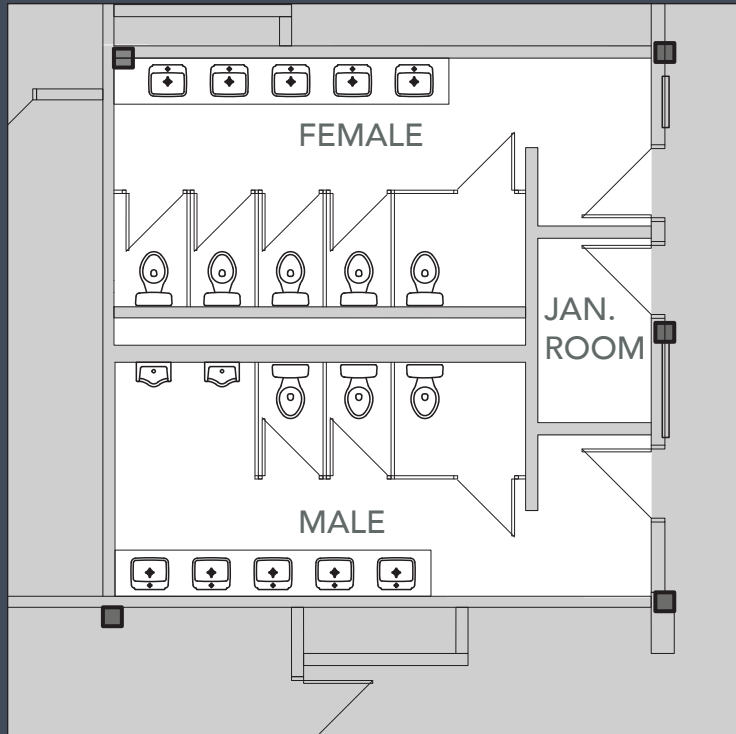
3. The Grantor shall:

- (a) not, nor permit any other person, to erect, place, install or maintain any building, structure, mobile home, concrete or asphalt driveway or patio, pipe, wire or other conduit on, over or under any portion of the Right-of-Way Area so that it in any way interferes with or damages or prevents access to, or is likely to cause harm to the Public Trail authorized hereby to be installed in or upon the Right-of-Way Area;
- (b) not do nor knowingly permit to be done any act or thing which will interfere with or injure the Public Trail, and in particular, will not carry out any blasting on or adjacent to the Right-of-Way Area without the consent in writing of the Grantee, provided that such consent shall not be unreasonably withheld;
- (c) not substantially diminish the soil cover over the Public Trail installed in the Right-of-Way Area, and in particular, without in any way limiting the generality of the foregoing, will not construct open drains or ditches along or across the Right-of-Way Area; and
- (d) from time to time and at all times upon every reasonable request, and at the cost of the Grantee, do and execute or cause to be made, done or executed all such further and other lawful acts, deeds, things, devices, conveyances and assurances in law whatsoever for the better assuring unto the Grantee of the rights hereby granted.

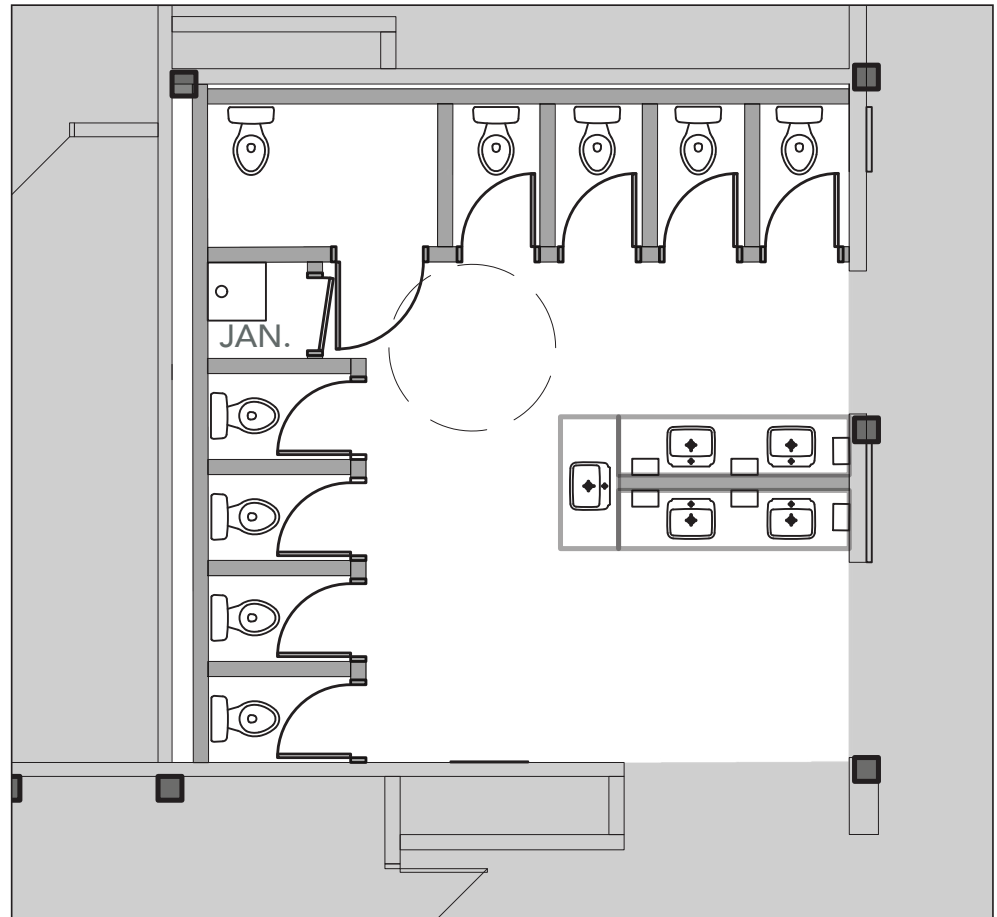
4. Waiver of any default by either party shall not be deemed to be a waiver of any subsequent default by that party.
5. This Agreement runs with the Lands.
6. The Grantee shall at all times and does hereby indemnify, save harmless, release and forever discharge the Grantor from and against all manner of actions, causes of action, claims, debts, suits, damages, demands and promises, at law or in equity whether known or unknown, including without limitation for injury to persons or property including death, of any person directly or indirectly arising or resulting from, or attributable to any use of the Right of Way Area by the Grantee and the public or to any act, omission, negligence or default of the Grantee in connection with or in consequence of this Agreement, save and except to the extent caused by any act, omission, negligence or default of the Grantor.
7. Notwithstanding anything contained in this Agreement the Grantee reserves all rights and powers of expropriation otherwise enjoyed by the Grantee.
8. Whenever it is required or desired that either party shall deliver or serve a notice on the other, delivery or service shall be deemed to be satisfactory if and deemed to have occurred when mailed by prepaid registered mail, on the date received or on the sixth day after receipt of mailing by any Canada Post office, whichever is the earlier, so long as the notice is mailed to the party at the address provided in this Agreement or to whatever address the party may from time to time provide to the other party.
9. Wherever the singular or masculine is used in this Agreement, the same is deemed to include the plural or the feminine or the body politic or corporate as the context so requires.
10. Every reference to each party is deemed to include the heirs, executors, administrators, successors, assigns, employees, agents, officers, and invitees of such party wherever the context so requires or allows.
11. If any section, subsection, sentence, clause or phrase in this Agreement is for any reason held to be invalid by the decision of a Court of competent jurisdiction, the invalid portion shall be severed and the decision that it is invalid shall not affect the validity of the remainder of the Agreement.
12. This Agreement shall enure to the benefit of and be binding on the parties notwithstanding any rule of law or equity to the contrary.
13. This Agreement shall be governed and construed in accordance with the laws of the Province of British Columbia.
14. Notwithstanding anything contained in this Agreement, neither the Grantor nor any future owner of the Lands or any portion of the Lands shall be liable under any of the covenants and agreements contained herein where such liability arises by reason of an act or omission occurring after the Grantor or any future owner ceases to have an interest in the Lands.

15. This Statutory Right-of-Way and the terms, covenants and conditions herein contained shall enure to the benefit of the Grantee and shall be binding upon the Grantor and the Grantor's heirs, executors, administrators, successors and assigns.
16. The Grantor acknowledges and agrees that this Statutory Right-of-Way shall be registered as a charge against the title to the Lands pursuant to the provisions of Section 218 of the *Land Title Act*, R.S.B.C. 1996, Chapter 250 in priority to all financial charges.

AS EVIDENCE OF THEIR AGREEMENT this Agreement was executed by the parties as of the date first written above on one or more pages of the General Instrument.



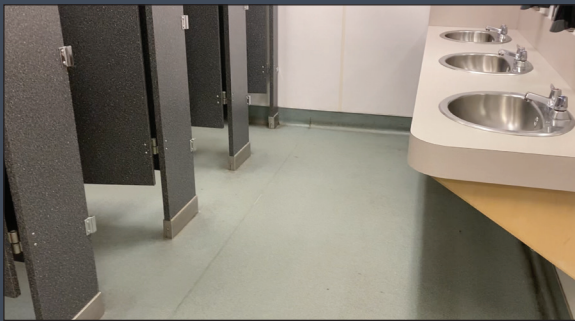
CURRENT WASHROOM PLAN



NEW WASHROOM PLAN

OBJECTIVES

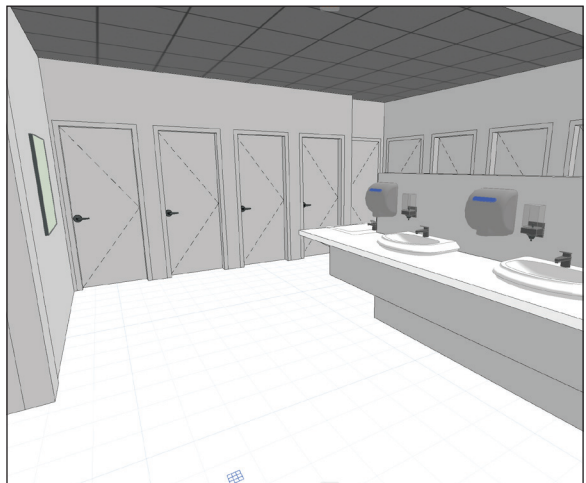
The new washroom stalls will be individual, floor-to-ceiling spaces with shared sinks. This redesign enhances accessibility, privacy, and hygiene, while improving visibility from the hallway and circulation within the washroom.



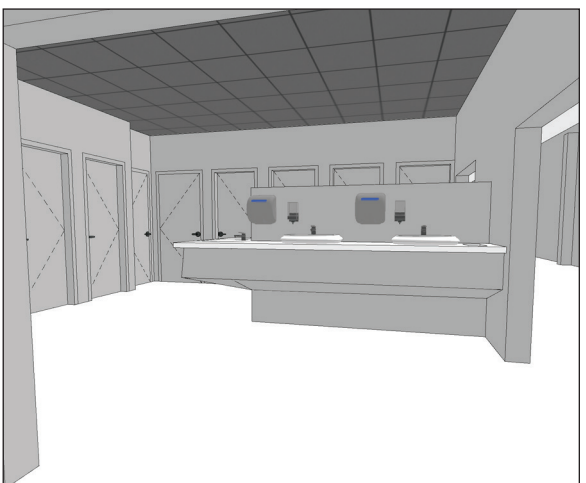
CURRENT WASHROOM



INSPIRATION FOR THE WASHROOM



3D MODEL

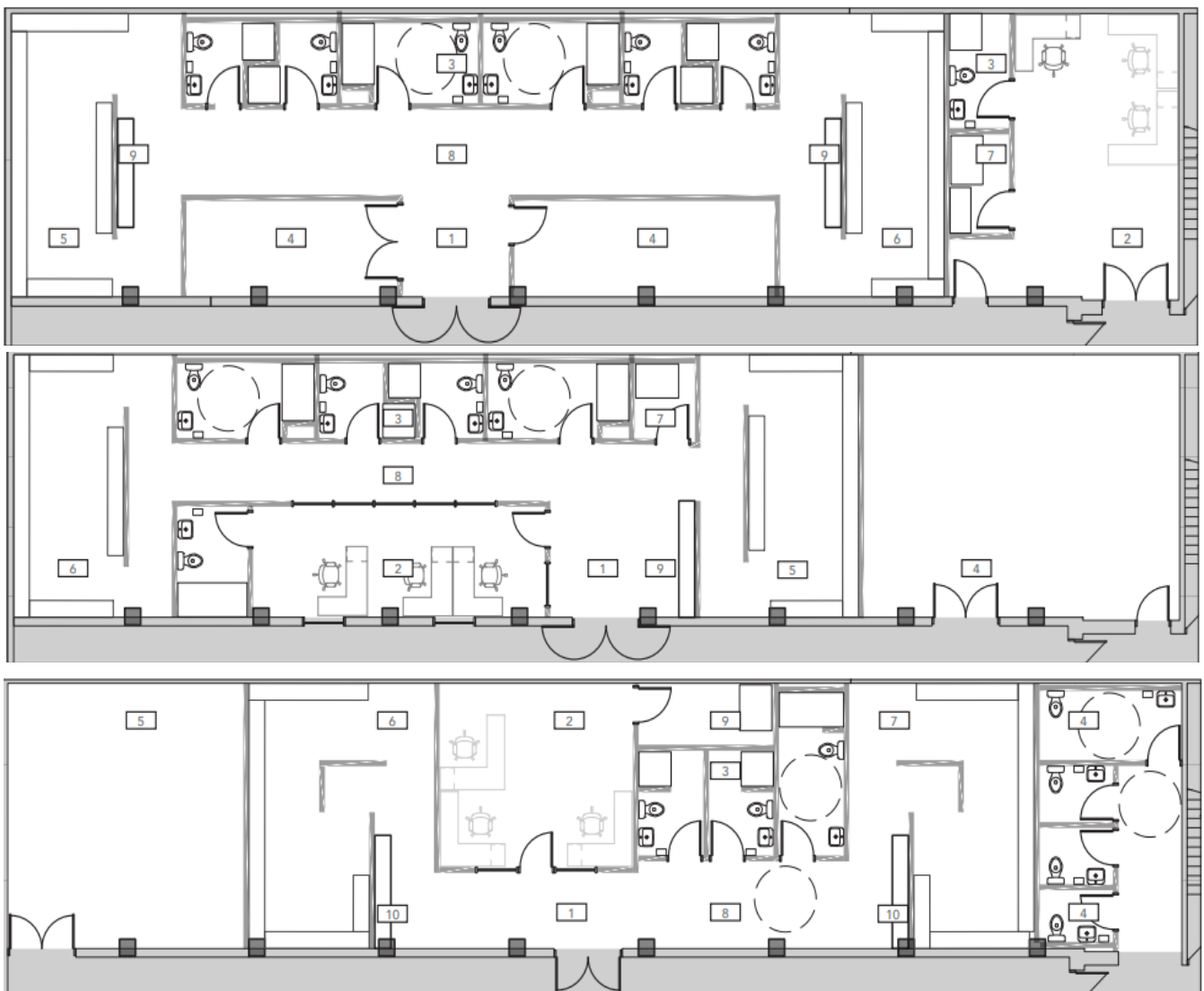


STAFF REPORT

J.L. Jackson Changeroom Proposed Renovation

Our goal is to renovate the existing changeroom to improve the function and safety of the changing rooms for all students. Equipment that was stored under the old bleachers needs to be accommodated, supervision concerns need to be addressed, and the space needs to meet the needs of all students.

Many revisions were shared and reviewed at the school with staff to find the best use of the areas available. Below are some options shared that accommodated changes staff and students asked for (i.e.: showers, storage, staff office amenities, larger change spaces, etc.)



The latest revision has slightly larger change spaces with additional seating.

2 single showers for students (11)

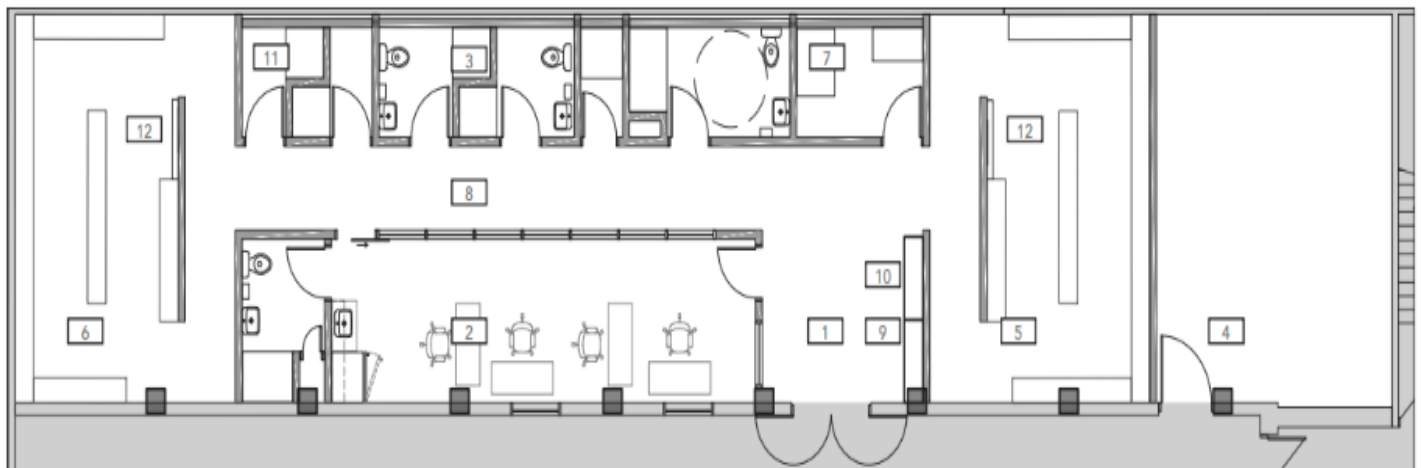
4 showers with bathrooms for students, including one accessible (3)

Laundry (7) moved out of the Office (2)

Lockers (9) / Cubbies (10) inside the entrance (1) doors

Mirrors with small shelf (12)

Supervision from the offices into the hallways - sight lines from gym through offices to common hallway.



We will continue to work on improving the plan with staff and student input.

Travis Elwood

Director of Operations



BRIEFING NOTE

TO:	The Board of Education	DATE: December 16, 2025
FROM:	Jeremy Hunt, Acting Secretary-Treasurer	
RE:	Board Policy 4060 – Accumulated Operating Surplus (Reserve) - Repeal	

Background:

Board Policy 4060 – *Accumulated Operating Surplus (Reserve)* is a policy which was adopted in 2018 due to Ministry of Education requirements. Since that time, the Ministry of Education and Child Care has implemented the K-12 Public Education Accumulated Operating Surplus Policy to ensure that there is consistency, transparency and accountability for the use of educational operating funding that is not used in the year in which it was provided.

Summary:

New Board Policy 110 – *Accumulated Operating Surplus* was developed in response to this Ministry Policy, using the policy template provided by the Ministry; therefore, replacing Policy 4060 and its corresponding Regulation 4060.01R.

Recommendation:

“That the Board of Education approve the recommendation to repeal Policy 4060 – Accumulated Operating Surplus (Reserve).”

Respectfully submitted,

Jeremy Hunt

Jeremy Hunt
Acting Secretary-Treasurer

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83	4060
	Adopted: 2018-07-11

POLICY**ACCUMULATED OPERATING SURPLUS (RESERVE)**

The Board of Education of School District No. 83 (North Okanagan-Shuswap) recognizes the importance of ensuring that the district is protected financially from extraordinary circumstances which would negatively impact school district operations and the education of students.

To discharge this responsibility, the Board will establish a restricted portion (contingency reserve) from available operating surplus which would be used to mitigate any negative impact such circumstances might cause.

The Board will be publicly transparent when allocating any surplus funds.

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83 REGULATION	4060.01R
	Adopted: 2018-07-10
<p style="text-align: center;">ACCUMULATED OPERATING SURPLUS (RESERVE)</p> <p>The School District’s objectives in terms of its accumulated operating surplus is set out in this regulation and accompanying policy. Through a clear understanding of its operating surplus objectives, and by continually measuring progress towards achieving those objectives, the School District can attain greater fiscal stability and better support educational goals.</p> <p>One of the key indicators of the financial health of a school district is the accumulated operating surplus. The accumulated surplus (or deficit) is comprised of all of the past operating surpluses and/or deficits.</p> <p>It is important to note that although accumulated surpluses can be a source of cash for spending, it cannot sustain on-going services. The ability to carry forward unspent operating funds helps school districts budget and spend their annual operating grants more effectively.</p> <p>INTERNALLY RESTRICTED OPERATING SURPLUS</p> <p>Unique to other organizations in the public sector, school districts are permitted to incur annual deficits as long as they have sufficient accumulated surplus to cover the annual deficit. An accumulated surplus indicates that a school district has net resources that can be used to provide future services. It is achieved by spending less than the revenue it earns.</p> <p>The Board may approve restrictions on the spending of the surplus. Boards of Education are required by legislation to prepare balanced annual operating budgets, which may include use of (appropriation of) prior year accumulated surplus.</p> <p>The following categories of internally restricted operating surplus have been established for the purposes(s) identified:</p> <p><u>Operations Spanning Future School Years</u></p> <p>To support effective planning, there will be situations where monies will need to be carried over to future years. These could be for the following categories:</p> <ul style="list-style-type: none"> • Future years’ operations/budget (not beyond the next two fiscal years) 	

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83 REGULATION	4060.01R
	Adopted: 2018-07-10
<ul style="list-style-type: none"> • Schools and department surplus/carry-forwards (not beyond the next two fiscal years); • Operating projects in progress; • Technology, utilities, equipment, and Capital projects (includes amounts to be transferred to Local Capital, but have not yet been identified for specific initiatives); • Purchase order commitments; and, • Distributed learning, International Program. <p>The amount of Accumulated Operating Surplus restricted for operations spanning future school years at the end of a fiscal year should be a minimum of 1.5% and a maximum of 3.0% of actual operating expenses of that fiscal year.</p> <p><u>Anticipated Unusual Expenses Identified</u></p> <p>To support effective planning, there will be situations where senior management has identified unusual/non-recurring expenses anticipated to be spent in the upcoming fiscal year that will not be funded by revenues of that year. These could be for categories such as:</p> <ul style="list-style-type: none"> • Staffing, labour relations, employee benefits, severance • Implementation of new curriculum <p>The amount of Accumulated Operating Surplus restricted for anticipated unusual expenses identified at the end of a fiscal year should be a minimum of 0.5% and a maximum of 1.0% of actual operating expenses of that fiscal year.</p> <p><u>Nature of Constraints on the Funds</u></p> <p>In recognition of some monies having constraints as to how they can be spent, funds may need to be internally restricted at the end of the fiscal year. Funds with external restrictions are to be included in Special Purpose Funds. These internal restrictions could be for categories such as:</p> <ul style="list-style-type: none"> • Contractual obligations (i.e. professional development) • Aboriginal education • School Generated Funds (not externally restricted) • Education Plan • Donator named funds (not restricted by the donor) 	

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83 REGULATION	4060.01R
	Adopted: 2018-07-10
<p>The amount of Accumulated Operating Surplus restricted for nature of constraints on the funds at the end of a fiscal year cannot be quantified as a range of minimum to maximum.</p> <p>CONTINGENCY RESERVE</p> <p>To support effective planning, there will be situations where contingency funds need to be available for unexpected increases in expenses and/or decreases in revenues. Budgeted annual operating expenses should be reflective of actual estimated costs or, where applicable, contractual expenditure requirements. The contingency reserve mitigates the risk of actual costs being greater than estimated. These could be for categories such as:</p> <ul style="list-style-type: none"> • For major emergent operating issues – the School District is exposed to major non-reoccurring costs related to various emergency events or situations, e.g. inclement weather, forest fires, etc. These emergent situations cannot be anticipated and budgeted for and may not be feasible to absorb the cost of such events in other budget areas in any given year. • For one-time and intermittent projects – the School District undertakes certain one-time and/or intermittent projects that are larger in terms of costs. If these projects were funded from annual per-pupil based operating grants from the Ministry of Education, annual fluctuations in educational service levels may result; therefore, it is not prudent to fund these projects from current annual per-pupil based operating grants from the Ministry of Education. • To offset unrealized revenues – some of the School District’s revenue sources, e.g. off-shore student enrolment, rentals, etc., are cyclical in nature and thus are subject to downturns in the economy. The School District tries to anticipate economic downturns by budgeting for a base dollar amount of these revenues in its general operations. Despite its best efforts, the School District is exposed to the possibility of unrealized revenues and/or to declines in base revenues from year to year. • The amount of Accumulated Operating Surplus restricted for Contingency Reserves at the end of a fiscal year should be a minimum of 0.5% and a maximum of 1.0% of actual Operating Expenses of that fiscal year. 	

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83 REGULATION	4060.01R
	Adopted: 2018-07-10
<p>UNRESTRICTED OPERATING SURPLUS</p> <p>The School District will maintain Unrestricted Operating Surplus balances for working capital purposes, i.e. to provide for operating expenditures before operating grants from the Ministry of Education are received. Maintaining minimum working capital levels eliminates or reduces the need to borrow externally and/or internally for operations. The School District may require emergency funds from time to time, from its Unrestricted Operating Surplus balance, for unforeseen costs. When this occurs the School District needs to rely upon sufficient balances being available.</p> <p>Also included in the Unrestricted Operating Surplus are funds that may be used in budget years beyond the next two fiscal years.</p> <p>The amount of Unrestricted Operating Surplus at the end of a fiscal year should be a minimum of 0.5% and a maximum of 1.5% of actual Operating Expenses of that fiscal year.</p> <p>INCREASES TO RESTRICTED SURPLUS</p> <p>Annual and/or periodic increases to the restrictions on the Accumulated Operating Surplus shall be specific to each category of restriction, as approved by the Board through the School District’s annual financial planning/budgeting process.</p> <p>RESPONSIBILITIES</p> <p>The School District’s Secretary-Treasurer shall be responsible for:</p> <ul style="list-style-type: none"> • Recommending the necessary increases/decreases and transfers so that the School District’s Restricted Operating Surplus and Unrestricted Operating Surpluses are maintained in accordance with this Policy; • Conducting an annual review of all restricted Operating Surplus balances, and Unrestricted Operating Surplus balances including comparing actual levels with the established minimum and maximum levels within this Policy and with other school district and jurisdiction benchmarks, and reporting the results of such a review to the Board of Education; and, • Recommending any revisions or amendments to this Policy, as may be required from time to time, as a result of changes in applicable Ministry of Education directives, accounting standards, economic conditions, etc. 	

NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83 REGULATION	4060.01R
	Adopted: 2018-07-10
<p>RESTRICTION INCREASES/DECREASES AND TRANSFER OF FUNDS</p> <p>Increases/decreases in Internally Restricted Operating Surplus in excess of \$20,000 will be considered by the appropriate Standing Committee and approved by the Board of Education.</p> <p>The Secretary-Treasurer has the authority to approve increases/decreases in Internally Restricted Operating Surplus up to and including \$20,000. Any such increases/decreases will be reported to the Finance Committee.</p> <p>Any transfer of funds between the Operating Fund and Capital Fund not included in the Annual Budget, or Amended Annual Budget, will be considered by the Finance Committee and approved by the Board of Education.</p> <p>It is expected that the annual operating budget will allow transfers to local capital which are sufficient to allow efficient replacement or acquisition of assets consistent with the School District's capital plan. Transfers to local capital should be authorised through the budget bylaw or by separate board motion. They should be supported by a planned use of the local capital balance.</p>	



BRIEFING NOTE

TO: The Board of Education **DATE:** December 16, 2025
FROM: Jeremy Hunt, Acting Secretary Treasurer
RE: **Board Policy 110 - Accumulated Operating Surplus – 2nd and Final Reading**

Background

The *School Act* requires Boards of Education (Boards) to prepare a balanced annual budget. Estimated spending in the annual budget must not exceed estimated revenue plus accumulated operating surplus (operating surplus). Operating surplus, with consistent rules and guidelines in place, enables boards to engage in long-term planning, mitigate financial risk and support consistent service to all students in the District.

Information

A Board achieves an operating surplus when its annual revenue exceeds annual expenditure. Transfers of operating surplus can then be made for the purpose of acquiring capital assets or supplementing Local Capital. An operating surplus means that the Board has financial resources that can be used to fund school district operations for a period longer than one year. The ability to carry forward unspent funds (with certain restrictions) enables the Board to effectively plan for future years.

To support effective planning, that includes risk mitigation strategies, the Board should consider maintaining a reasonable amount of unrestricted operating surplus. The Board may require emergency funds from time to time or need contingency funds available for unexpected increases in expenses and/or decreases in anticipated revenues. When this occurs, the Board needs to have access to enough funds to continue to provide educational services and operations without making service cuts. The amount that is proposed in the policy for this is between 1% to 2.5% of operating expenditures.

Summary

Policy 110 aligns with the Board's strategic priority of responsible governance and stewardship. It strengthens the Board's commitment to accountability and governance while also adhering to the Ministry of Education and Child Care's requirement that all boards have in place a policy on accumulated surplus in line with the Ministry's K-12 Public Education Accumulated Surplus Policy. The Board gave first reading to Policy 110 – Accumulated Operating Surplus at its November 18th Regular Board Meeting.

Recommendation

"That the Board of Education approve the second and final reading of Policy 110 - Accumulated Operating Surplus."

Respectfully submitted,

Jeremy Hunt

Jeremy Hunt
Acting Secretary-Treasurer

POLICY 110 ACCUMULATED OPERATING SURPLUS

The Board believes that the maintenance of appropriate operating surpluses or reserves contributes to the District's financial health and stability. The Board achieves an operating surplus when its annual revenue exceeds annual expenses. An operating surplus means that the Board has financial resources that can be used to operate schools for a period longer than one year. The ability to carry forward unspent funds enables the Board to effectively plan for future school years. Such operating surpluses may be restricted, which means the Board has designated such funds to be expended for a particular purpose in the future. Reserves which are not restricted are referred to as unrestricted operating surpluses.

The *School Act* requires Boards of Education prepare a balanced annual budget. Estimated spending in the annual budget must not exceed estimated revenue and may include the use or appropriation of prior years' accumulated operating surplus to balance the budget.

Regular board monitoring of restricted and non-restricted surplus balances is required to assess the appropriateness of such operating surplus balances and to determine if the financial health of the District is being achieved. To that end, quarterly financial reports shall include the status of all operating surplus balances. For restricted surpluses the status shall include the balance and the purpose for which the Board, through motion, has restricted those funds.

This policy is designed to meet the following objectives:

- To comply with Ministerial direction in regard to accumulated operating surpluses.
- To the extent possible, assist the Board in expending the current budget to support students.
- To provide for the long-term financial health of the District so a strong educational system is maintained for the benefit of current and future students.
- To protect the District from extraordinary financial circumstances which would negatively impact the education of students.

1. Internally Restricted Operating Surplus Funds

The Board may set aside a portion of operating surplus funds to support long-term financial planning and for items that are linked to multi-year strategic objectives and future operational needs. Restrictions are made only for defined operational needs with defined timelines, including services or purchases that are directly related to the Board's District Strategic Plan, operations needs, and enhanced educational outcomes for students.

To increase transparency, every appropriation requires a board motion. Approval of appropriations related to confidential matters or land, legal or personnel matters shall be considered in a closed board meeting.

2. Unrestricted Operating Surplus or Local Capital Surplus (Contingency Reserve)

The Board is responsible for ensuring the District is protected financially from extraordinary circumstances which would negatively impact school district operations and the education of students. To discharge this responsibility, the Board will establish a contingency reserve with available

The Board of Education of Kwátsalktnéws ne Secwepemcúl'ecw School District No. 83

operating surpluses, if applicable, which would be used to mitigate any negative impact such circumstances might cause.

The Board shall maintain a contingency reserve of operating expenditures at a minimum of 1%, if available, and shall not exceed ~~3%~~ 2.5% of operating expenditures.

3. Restricted for Future Capital Cost Sharing

To support major capital projects that are identified by the Boards' 5-year Capital Plans, and approved by the Ministry for concept plan or business case development, the Board may restrict operating surplus to satisfy capital project cost share expectations at the time the project is brought forward for funding approval.

4. Use of Appropriated Surplus and Contingency Reserve

The Board may approve the use of Appropriated Surplus or Contingency Reserve under the following circumstances **such as, but not limited to:**

- The elimination of any deficit arising at the end of a fiscal year.
- Funding for new cost pressures in a school year that were not known at the time of budget development.
- Unanticipated utility cost pressures.
- The payment of severance (wages and benefits) upon termination of employment.
- The settlement of any legal action that is not covered by the School Protection Plan.
- Continuity of District or school-based projects that span more than one school year.
- Coverage for disaster recovery expenditures.
- Extraordinary expenses incurred to ensure business continuity.
- Coverage for unexpected additional major capital project costs not funded by the Ministry of Education and Child Care.
- To assist in balancing annual budgets for future school years.

In recognizing that the use of the contingency reserve represents a one-time source of funding, the Board will incorporate into its future budget planning processes, strategies to re-establish the contingency reserve. Such strategies may be implemented over a period of two years.

5. Interfund Transfers

Interfund transfers are funds transferred from one fund to another (e.g., between the Operating fund and the Capital Fund). All transfers to and from Operating Surplus Reserves or Capital Surplus Reserves must be authorized by specific Board motion.

Transfers will normally be considered by the Board as part of the Board's approval of the Annual Budget or Amended Annual Budget.

Transfers from operating surpluses to the Local Capital reserve will be considered by the Board as part of the Board's review of the draft audited financial statements and must be supported by a plan detailing the proposed use of the Local Capital balance.

6. Local Capital

Local Capital includes the Board's portion of any proceeds from the disposition of capital assets, transfers from operating funds and interest earned on Local Capital funds restricted for the purchase of tangible capital assets. Transfers from operating funds to Local Capital must be made only for specific initiatives that have a clear linkage to the District's Strategic Plan, or that address capital assets investment, or that meet the specified needs of the school district.

References: School Act [RSBC 1996, Part 4, Division 6, Section 52(2)]

Date Adopted: July 11, 2018

Date Amended:

DRAFT

Board Accumulated Operating Surplus Policy (Sample Only)

The School Act requires boards of education (boards) to prepare a balanced annual budget. Estimated spending in the annual budget must not exceed estimated revenue plus accumulated operating surplus (operating surplus). Operating surplus, with consistent rules and guidelines in place, enables boards to engage in long-term planning, mitigate financial risk and support consistent service to all students in the province.

To demonstrate accountable and transparent operating surplus financial planning, the board will make publicly available (eg. post on website) information about how and when the board will engage the local community and education-partner groups, including local First Nations and Métis Nation BC, on how it will manage operating surplus (eg. during budget consultations).

Categories of Surplus

To align with the guidance in the Ministry of Education and Childcare's (Ministry) [Accumulated Operating Surplus Policy](#) the board will use the following categories to manage surplus.

Internally restricted operating surplus

To support long-term financial planning the board can restrict operating surplus for use in future years within ministry-specified guidelines (see the Ministry [Companion Guide to the Accumulated Operating Surplus Policy](#)). To increase transparency, appropriations require a board motion. It is appropriate for some motions to be made in a closed board meeting (for example, related to land, legal or personnel matters), but the default should always be to a public meeting motion whenever possible.

Restrictions can be made for items that are identified by the board, have defined timelines, are directly related to a board's goals outlined in their strategic, operational and financial plans, or that meet the specified needs of the school district. The three streams of internally restricted operating surplus are:

- Restricted due to the nature of constraints on the funds;
- Restricted for anticipated unusual expenses identified by the board; and
- Restricted for operations spanning multiple school years

Unrestricted operating surplus (contingency)

To support effective planning, that includes risk mitigation strategies, the board will maintain a reasonable amount of unrestricted operating surplus. The board may require emergency funds from time to time or need contingency funds available for unexpected increases in expenses and/or decreases in anticipated revenues. When this occurs, the board need to have access to enough funds to continue to provide educational services and operations without making service cuts.

Restricted for future capital cost sharing

To support major capital projects that are identified in boards' 5-year Capital Plans, and approved by the Ministry for concept plan or business case development, the board may restrict operating surplus to satisfy capital project cost share expectations at the time the project is brought forward for funding approval. Capital cost share expectations can be found within the [Capital Planning Instructions](#).

Local capital

Local Capital includes the board's portion of any proceeds from the disposition of capital assets, transfers from operating funds and interest earned on Local Capital funds restricted for the purchase of tangible capital assets. Transfers from operating funds to Local Capital must be made only for specific initiatives that have a clear linkage to the board strategic goals, or that address capital assets investment, or that meet the specified needs of the school district.

Reporting

The board will use the existing Ministry financial reporting framework to annually provide the Ministry with an annual report on their budget allocation decisions, (including operating surplus and Local Capital), demonstrating that approved allocations support boards' strategic objectives.



The Board of Education of School District No. 83

BRIEFING NOTE

TO: The Board of Education
FROM: Donna Kriger, Superintendent
RE: **Board Policy 1050 - Pandemic Planning**

DATE: December 16, 2025

Background:

Board Policy 1050 – *Pandemic Planning* is a policy which was adopted in 2010 prior to an actual pandemic. Since that time, the COVID-19 Pandemic of 2020-2021 has taught us that direction setting during a global pandemic becomes the responsibility of the Provincial Chief Medical Health Officer. All restrictions or mandates that are established as a result of a pandemic are legislated through Ministerial Order.

Information:

As a government funded public school district, we are required to follow all guidelines, restrictions, and/or mandates as legislated.

Summary:

Government legislation directs all public entities during a pandemic and as such Policy 1050 is redundant and is being brought forth to repeal.

Recommendation:

"That the Board of Education approve the recommendation to repeal Policy 1050 – Pandemic Planning."

Respectfully submitted,

Donna Kriger
Superintendent of Schools

**THE BOARD OF EDUCATION NORTH
OKANAGAN-SHUSWAP SCHOOL
DISTRICT NO. 83**

1050

Adopted: 2010-04-13

POLICY

PANDEMIC PLANNING

The Board of Education desires to provide a healthy learning environment for students and a healthy and safe workplace for its employees. As part of this responsibility, the District will initiate measures to respond to an outbreak of a disease which has been declared a pandemic by Health Authorities. A pandemic is a worldwide illness due to the spread of a new infectious agent such as a virus that rapidly spreads via human contact and the majority of population has little or no immunity.

The employees and students will follow the procedures described in the district's regulations when the Superintendent of Schools, in consultation with the Interior Health Authority and Chief Medical Officer, declares a pandemic response is required.

To be accomplished, in part, through Regulation:

1030.05R *Epidemics, Absenteeism*

1050.01R *Pandemic Response*

1030.11R *Medical Support to Students*



BRIEFING NOTE

TO: The Board of Education
FROM: Donna Kriger, Superintendent
RE: **Board Policy 3020 – Energy Management**

DATE: December 16, 2025

Background:

One of the key responsibilities of the Board of Education is to provide direction through its policy process. These include planning, developing, implementing, and evaluating policy.

Summary:

Board Policy 3020 was originally adopted in 2010 and has not seen any amendments since that time. During the 2024-25 school year, a working group developed the Environmental Stewardship Action Plan. On June 17, 2025, the Board of Education adopted the Environmental Stewardship Action Plan as a comprehensive roadmap for fostering a sustainable future. The plan outlines five pathways of environmental stewardship: Learning, Culture and Leadership, Sustainability, Climate Change mitigation and adaptation, and Responsibility to the Land. Each pathway includes specific objectives designed to guide meaningful action and measurable progress.

The Board of Education has also developed Policy 124 – Environmental Stewardship and Sustainability which is more robust and replaces the original Policy 3020.

During the December Policy Committee Meeting, the committee unanimously agreed that Policy 3020 be repealed.

Recommendation:

“That the Board of Education approve the recommendation to repeal Policy 3020 – Energy Management.”

Respectfully submitted,

Donna Kriger
Superintendent of Schools

**THE BOARD OF EDUCATION NORTH
OKANAGAN-SHUSWAP SCHOOL
DISTRICT NO. 83**

3020

Adopted: 2010-05-11

POLICY

ENERGY MANAGEMENT CONSERVATION

The Board of Education recognizes its responsibility to ensure that every reasonable effort is made to conserve energy and natural resources within the School District while exercising sound financial management. The Board will support initiatives that ensure the most efficient, effective, and economic use of energy resources.

The Board is committed to environmental sustainability and, through the employees and students, will ensure that every reasonable effort is made to conserve energy and natural resources in order to reduce the school district's carbon footprint.

The Board believes that staff and students must be active in building a society that is socially responsible and environmentally sustainable.

**THE BOARD OF EDUCATION NORTH
OKANAGAN-SHUSWAP SCHOOL
DISTRICT NO. 83**

Category: **3020.01R**

Adopted: 2010-05-11

REGULATION

ENERGY MANAGEMENT CONSERVATION

The implementation of the energy management and conservation policy is the collective responsibility of the Board, District Staff, school Administrators, teachers, support staff and students. Implementing acceptable and sustainable energy practices and behaviours will be achieved by:

- (a) Employees and students contributing and supporting energy conservation initiatives and being “energy savers”
- (b) schools using a variety of curricular materials to provide students an opportunity to participate in energy management initiatives
- (c) encouraging community engagement and partnerships in all district environmental learning and sustainability activities
- (d) supporting staff, students and parents in local or global projects that will serve as on-going reminders of this commitment
- (e) establishing a district energy management plan that will include both short term and long term targets
- (f) reporting annually to the Board on the progress towards the targets and initiatives taken by staff and students
- (g) ensuring that any additions or changes to physical infrastructure includes energy conservation methods or techniques to reduce the carbon footprint
- (h) tracking, monitoring, reporting and communicating the energy consumption at all sites in the district
- (i) engaging District Staff in cooperation with the Energy Manager to coordinate, develop, and assist in the efficient and effective use of energy systems and practices.

POLICY 124 ENVIRONMENTAL STEWARDSHIP AND SUSTAINABILITY

The Board of Education recognizes that the planet is in a state of climate emergency (see Intergovernmental Panel on Climate Change, 2023). We acknowledge the legitimacy of the United Nations Climate Action Charter (2016) and B.C.'s Climate Action Charter (endorsed March 10, 2009, by our District).

As stewards on Secwépemc ancestral lands, we are committed to fostering environmental sustainability and honouring the deep connections between this territory and its ecosystems. Stewardship is defined as making informed decisions and taking appropriate actions to protect and conserve resources for all plants and animals who share our planet. The District defines environmental sustainability as meeting the needs of the present without compromising the ability of future generations to meet their own needs. This commitment is guided by the principles of Reduce, Reuse, and Recycle.

The Board acknowledges that achieving environmental sustainability requires shared responsibility among trustees, administrators, teachers, students, and support personnel. Its success depends on cooperation at all levels and integration into our collective practices and decision-making.

The Board's commitment to environmental sustainability is closely aligned with the priorities outlined in the Strategic Plan.

Intellectual Development

The District is responsible for the education and well-being of current and future students. As part of our commitment to expanding teaching and learning practices, the District will:

- Promote the growth of ecological literacy and ethics, empowering students to understand environmental challenges.
- Embed environmental education within instruction, connecting core competencies to real-world sustainability challenges.
- Emphasize First Peoples' knowledge and other traditional ecological knowledge, honouring Secwépemc perspectives on caring for the land.
- Address environmental issues and engage students in climate action projects, fostering creativity, adaptability, and resilience.
- Provide students with flexible work skills in a changing world.
- Support students emotional coping strategies in the context of climate change.
- Support the development of a Green Team or Eco Club at each school to support action at the school level.

Community Partnership Development

Expanding a culture of social responsibility requires meaningful collaboration with community partners. The District will:

- Endeavour to work with various levels of governments, Indigenous communities, and community partners to align efforts and deepen our impact.
- Naturalize school grounds with an ecological and educational lens.

Effective Governance and Leadership

The Board's leadership role includes promoting sustainability and environmental accountability. The District will:

- Optimize energy efficiency in new and existing buildings.
- Limit Green House Gas (GHG) emissions and consider alternate fuel sources.
- Conserve resources, including energy, water, and materials, and promote responsible purchasing practices.
- Reduce waste, including electronic waste, through effective composting, recycling, and proper disposal.
- Track energy consumption and material used to measure progress and identify areas for improvement.
- Uphold accountability to the policies, administrative procedures, and targets previously endorsed by the Board.
- Support the planning and funding of professional development related to sustainability and environmental education.

As a large consumer of energy and resources, the District acknowledges its responsibility to serve as a model for sustainability. Staff and students are encouraged to take immediate, positive, and collective action towards mitigating climate change and adapt to its inevitable impacts. This shared commitment reflects our values of Reconciliation, Respect, and Empathy and strengthens our stewardship of the Secwépemc lands.

References: **SD83 Strategic Plan 2023-2028**; IPCC 2018 Summary for Policymakers of IPCC Special Report on Global Warming of 1.5°C approved by governments — IPCC 2023 Climate Change AR6 Synthesis Report; UN Climate Action Charter, 2016 Climate Change – United Nations Sustainable Development; BC Climate Action Charter <https://www2.gov.bc.ca/gov/content/speical/2016-climate-change-united-nations-sustainable-development>; The British Columbia Climate Action Charter ([gov.bc.ca](https://www2.gov.bc.ca/gov/content/speical/2016-climate-change-united-nations-sustainable-development))

Date Adopted: September 21, 2021

Date Amended: March 11, 2025



The Board of Education of School District No. 83

BRIEFING NOTE

TO: The Board of Education
FROM: Donna Kriger, Superintendent
RE: **Board Policy 9040 – Student Access to Schools**

DATE: December 16, 2025

Background:

One of the key responsibilities of the Board of Education is to provide direction through its policy process. These include planning, developing, implementing, and evaluating policy.

Summary:

Board Policy 9040 was originally adopted in 1997 and the most recent amendment to the policy occurred in 2012. The policy has a series of regulations (9020.01R, 4020.01R, 9020.01R) which are outdated and not being followed. Administrative Procedure 300 – Student Registration and Student Transfer Requests was adopted and is being followed with both elementary and secondary students.

During the December Policy Committee Meeting, the committee unanimously agreed that Policy 9040 be repealed.

Recommendation:

“That the Board of Education approve the recommendation to repeal Policy 9040 – Student Access to Schools.”

Respectfully submitted,

Donna Kriger
Superintendent of Schools

<p>NORTH OKANAGAN-SHUSWAP SCHOOL DISTRICT NO. 83</p> <p>POLICY</p>	<p>9040</p> <p>Adopted: 1997-05-13 Amended: 2004-03-24 Amended: 2012-12-11</p>
<p style="text-align: center;">STUDENT ACCESS TO SCHOOLS</p> <p>Normally, we believe that students attend their neighbourhood schools, except under special circumstances.</p> <p style="text-align: center;"><i>To be accomplished, in part, through Regulation:</i> 9020.01R <i>Student Transfers to Different Areas</i></p> <p>Under special circumstances, we may be willing to provide a boarding allowance to students who must live away from home to attend school.</p> <p style="text-align: center;"><i>To be accomplished, in part, through Regulation:</i> 4020.01R <i>Boarding Allowance</i></p> <p>Students from districts within British Columbia, but out of this district, may attend subject to the provisions of the School Act.</p> <p>Out of province students may attend, provided they pay for the services provided.</p> <p style="text-align: center;"><i>To be accomplished, in part, through Regulation:</i> 9020.02R <i>Out of District Pupils</i></p>	

ADMINISTRATIVE PROCEDURE 300

STUDENT REGISTRATION AND STUDENT TRANSFER REQUESTS

BACKGROUND

The District recognizes that a school-age resident of British Columbia may enroll in an educational program in any district and attend any school, provided there is space available, and an appropriate program can be provided for the student at no extra cost to the District.

Students living within a catchment boundary will normally attend the school within that area. Parent(s)/guardian(s) may, however, request that their child attend a school or program outside their designated catchment area.

All students will be treated in a fair and equitable manner with respect to District placements. Decisions relating to requests for placement will be made in accordance with the procedures outlined in this administrative procedure.

DEFINITIONS

Assigned School - The school designated by the Board based upon the student's place of residence subject to space availability.

Catchment Area - In relation to a school, is the geographical area established under [Section 75.1](#) of the *School Act* that defines the boundaries of a school to which a student has first priority to attend, as defined by the District's school boundary descriptions.

Catchment Area Child – A person who is of age and resident in the catchment area of the school.

Continuing Student – A student who attended the school during the previous school year.

Cross-Boundary Student – A student wishing to attend a school outside of their District catchment area. Cross-boundary students are required to submit an application when moving from one school to the next if continuing outside of their District catchment area.

District Student – A catchment area child or a non-catchment area child who resides in the District.

District Program – The catchment area for a District program is defined to be the entire District.

Enrolment – A student is enrolled when the school gives permission for the student to attend and enters them into the school's register.

Feeder Schools – The catchment "Feeder" schools and their associated "receiving" schools are identified in the District's established boundary descriptions.

Non-Catchment Area Student – A person who is of school age, resident in the District, and not resident in the catchment area of the school.

Non-District Student – A person who is of school age, resident in British Columbia, and not resident in the District.

Previous School Year – As defined in the School Act, the school year previous to the school year for which the person is applying to enroll in the educational program.

School Wait List (Catchment Students) – A school list identifying newly arriving students who reside in the District and have been placed at a nearby school since available space, facilities, or resources are not available at the student's catchment school.

Cross-Boundary List (Transfer Students) – A school list that identifies and prioritizes the first-time transfer applicants who reside in British Columbia and have not been given permission to attend a requested school due to the lack of available space and facilities at the time of application.

Transfer Student – A non-catchment or non-District student who applies to attend a school or program other than their catchment school.

PROCEDURES

1. [Section 74.1](#) of the *School Act* establishes priorities for enrolment to apply if the District determines that space and facilities are available in a school.
 - 1.1. Space and facilities are available in a school for purposes of [Section 74.1\(6\)](#) and [\(7\)](#) of the *School Act*.
 - 1.1.1. If there is space available, taking into account both the physical and instructional resources after reasonable enrolment projections have been made to allow for the following:
 - 1.1.1.1. accommodation of new catchment students;
 - 1.1.1.2. students returning from prior years;
 - 1.1.1.3. students enrolling in District programs;
 - 1.1.1.4. students incoming from designated feeder schools; and,
 - 1.1.1.5. children enrolling kindergarten who live in the catchment area of the school.
 - 1.2. Each First Nations Band, in consultation with the School District, are entitled, under [Section 74.2](#) of the *School Act*, to designate the "School of Choice" for students who are ordinarily resident of the First Nation and are on the Band's nominal roll. Each First Nation Band may designate one School of Choice for each age group of students.
 - 1.2.1. Students who are ordinarily resident of the First Nation and are on the Band's nominal roll will usually attend their catchment school.
 - 1.2.1.2. If parent(s)/guardian(s) wish to enroll their child(ren) at the designated School of Choice, they must do so by April 10th for priority registration.

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- 1.2.1.3 After that date, regular cross-boundary processes are in effect, except that, priority will be given to students from the First Nations Band in the cross-boundary process.
 - 1.2.2. The First Nations Band must make the designation of the School of Choice in writing to the Board.
 - 1.2.2.1 The designation of the catchment schools continues for each subsequent year unless the First Nations Band revokes the School of Choice designation.
 - 1.2.3. Enrolment in specialty programs within the designated school or any other district school or program follows the same process as for any other student.
 2. Available space shall be determined by the Superintendent or designate, in consultation with the principal of the school involved, based on program capacity, including consideration of the following factors:
 - 2.1. The operating capacity of the school as defined by the District.
 - 2.2. The level of staff assigned to a school.
 - 2.3. The physical space in which to operate instructional programs.
 - 2.4. The ability to provide appropriate educational programs for the applicant and other students.
 - 2.5. The needs of other programs located in the school.
 3. Kindergarten Registration and School/Program of Choice Registration will open on the third Wednesday in January of each year.
 - 3.1. All Kindergarten students not enrolling in a School/Program of Choice, must enroll in their catchment area school prior to beginning the process of transferring to another school.
 4. When a parent/guardian requests that their child attend a school or program outside of the designated catchment area, the following procedures must be followed:
 - 4.1. Elementary and Middle Cross-Boundary Process
 - 4.1.1. The first date that new Cross-Boundary Request Forms (Form 300-1) will be received at a school will be the third Wednesday in January of each year.
 - 4.1.2. Cross-boundary students and students outside the District must apply for registration at the requested school no later than May 31st.
 - 4.1.3. A parent/guardian requesting a transfer for their child must register their child in their catchment area school and complete the Cross-Boundary Request Form. Student Cross-Boundary Request Forms may be acquired at the catchment area
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school. The catchment area school will note on the registration form (for new students) that a transfer request has been made.

- 4.1.4. The principal of the catchment area school must also sign the Cross-Boundary Request Form. The principal of the child's catchment area school may request a meeting with the parent /guardian and/or child in order to discuss the requested transfer.
- 4.1.5. The parent/guardian may then submit the form to the requested school. Cross-Boundary Request Forms are to be dated when they are received by the requested school.
- 4.1.6. The principal of the catchment area school must contact the principal of the requested school to discuss the reason(s) for the transfer request.
- 4.1.7. The principal of the requested school must submit the Cross-Boundary Request Form to the Superintendent or designate once it has been completed.
- 4.1.8. A deadline for transfer requests will be May 31st, and again on the Friday after Labour Day, to ensure that students who move into the catchment area during the summer will have priority at their catchment area school.
- 4.1.9. Decisions regarding transfer requests will be determined near the end of the first week of school in September. Students are expected to attend their catchment area school until a determination has been made. In some circumstances, transfer requests may be approved before June 30th if both principals and the Superintendent or designate have confidence they can accept the student and still have room for additional catchment area students.
- 4.1.10. Transfer requests received between October 1st and May 31st may be considered and approved for the current school year.
- 4.1.11. During the summer months when schools are closed, parent(s)/guardian(s) with questions regarding the registration process are welcome to contact the District Education Support Centre at 250-832-2157.

4.2. Secondary Cross-Boundary Process

- 4.2.1. Students new to the catchment area must register at the catchment area school prior to completing the Cross-Boundary Request Form.
- 4.2.2. Principals/Vice Principals must ensure that students have completed the course selection process in their catchment school prior to completing the Cross-Boundary Request Form.
- 4.2.3. New Cross-Boundary Request Forms (Form 300-2) will be received at a school no later than March 31st. In some circumstances, transfer requests may be approved before June 30th if both principals and the Superintendent or designate have confidence they can accept the student and still have room for additional catchment area students.

- 4.2.4. The principal of the catchment area school must also sign the Cross-Boundary Request Form. The principal of the child's catchment area school may request a meeting with the parent/guardian and/or child in order to discuss the requested transfer.
 - 4.2.5. The parent/guardian may then submit the form to the requested school. Cross-Boundary Request Forms are to be dated when they are received by the requested school.
 - 4.2.6. The principal of the catchment area school must contact the principal of the requested school to discuss the reason(s) for the transfer request.
 - 4.2.7. The principal of the requested school must submit the Cross-Boundary Request Form to the Superintendent or designate once it has been completed.
 - 4.2.8. Cross-boundary requests after March 31st and decisions regarding remaining transfer requests will be determined near the end of the first week of school in September to ensure that students who move into the catchment area during the summer will have priority at their catchment area school. Students are expected to attend their catchment area school until a determination has been made.
 - 4.2.9. Transfer requests received after March 31st may be considered and approved for the upcoming school year.
 - 4.2.10. During the summer months when schools are closed, parent(s)/guardian(s) with questions regarding the registration process are welcome to contact the District Education Support Centre at 250-832-2157.
5. Parent(s)/guardian(s) exercising the option of sending their children to schools other than those normally serving the areas in which they reside shall be wholly responsible for any transportation arrangements and costs.
6. After enrolment of continuing students, and if the required space and facilities are determined to be available, applications from new students will be accepted in the following order of priority, provided that application deadlines and other requirements have been met:
 - 6.1. A student from a First Nations Band at their designated school of choice.
 - 6.2. A catchment area student.
 - 6.3. A non-catchment area student.
 - 6.4. A non-District student.
7. If space and facilities are inadequate to accommodate all continuing students, they will normally be re-enrolled in the following order of priority:
 - 7.1. A student from a First Nations Band at their designated school.

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- 7.2. A continuing non-catchment area student.
 - 7.3. A continuing non-District student.
 8. When applications made within the appropriate registration periods have the same priority (after application of any permissible sibling preference) the priority between them will be determined by time and date of application.
 9. Continuing students within the same school are not required to re-apply. They will be automatically enrolled in the applicable educational program or school, subject to space availability and to meeting program requirements, unless transferred or withdrawn.
 10. Applicants for enrolment in District programs must meet all requirements for the requested educational program and will be subject to any selection process established.
 11. Enrolment applications from non-District students may be refused if the student is under suspension from a B.C. public school or district; or has been refused an educational program by a B.C. public school or district under [Section 85\(3\)](#) of the *School Act* for refusing to comply with the Student Code of Conduct and other rules and policies of the District or has failed to apply themselves to their studies.
 - 11.1. Such applications will be referred to the Superintendent for a decision on admission. Admissions may be subject to terms and conditions. A student who has been admitted under this section is not entitled to the status of a continuing student in the following year unless approved by the Principal or Superintendent.
 12. When one sibling is enrolled in or admitted to an educational program in a school, other siblings are given priority within their requested educational programs in the same school, with the exception of French Immersion. This status does not apply where the siblings will not be attending concurrently.
 13. In the event that the District may not be able to accommodate a catchment student within the catchment school, the student will be placed on a Wait List prioritized by date and time of application. The District will accommodate the student at a neighbouring school until space becomes available.
 14. Transfer During the School Year
 - 14.1. All school-initiated transfers must be approved by the Superintendent, or designate, following consultation with the Principals at the sending and receiving school. A student may be transferred to another school, at any time in the school year, in consideration of the following:
 - 14.1.1. Medical reasons.
 - 14.1.2. Compassionate grounds.
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- 14.1.3. Exceptional circumstances.
- 14.1.4. There is not space for the new registrants at the school.
- 14.2. The sending Principal shall discuss the situation with the parent(s)/guardian(s) of the student.
- 14.3. Where necessary, the Superintendent may become involved in school-initiated transfers and make the final decision on the transfer.
- 15. Admission into District Programs may warrant that a non-catchment area student transfer to a secondary school for one or more semesters at the discretion of the receiving principal. Such placement does not entitle the student to priority enrollment status at that school.
- 16. The District recognizes that when District programs exist that are located outside a student's designated catchment area, the District shall be considered the catchment area for that particular program.
- 17. In the case of conflict between the provisions of this administrative procedure and the *School Act*, the latter shall prevail.

References: Form 300-1 Cross-Boundary Request – Elementary and Middle Schools; Form 300-2 Cross-Boundary Request – Secondary Schools; *School Act* [Sec\(s\) 74.1, 74.2, 75.1](#), and [85\(3\)](#)

Date Adopted: April 14, 2025

Date Amended:

Quelmúcw Education Council Retreats & Regional IEC Gathering



1

Bill 40

- In the Spring of 2024, Bill 40 was passed as an addition to the *School Act*.
- School Districts are required to have Indigenous Education Councils (IEC).
- At the time of passing Bill 40, 20 out of 60 school districts did not have an IEC.
- In the 2024-2025 school year, additional funding for IECs was introduced to “build capacity” for IEC members and to run an IEC.
- The funding continued this current school year and is likely to be half funding next year.
- This funding has allowed the Quelmúcw Education Council to set learning goals and a work plan, and to engage in deep learning during retreats last year and this year.

OUR MISSION Empowering students to become confident, curious, and caring individuals who thrive in their learning, relationships, and community
 OUR VISION Preparing students to become educated citizens who contribute positively to a dynamic, sustainable, and diverse world
 OUR VALUES Belonging, Respect, Reconciliation, Empathy, Equity, Perseverance



2

November 5-7, 2024

- Revelstoke Resort
- Relationship Building:
 - Circle Introductions
 - Social Time Together
 - Setting Meeting Norms/Community Agreements
- Learning:
 - Bill 40
 - Distinctions-Based Approach
 - Ministry Designations & IEP Processes
 - Inclusive practices in secondary Indigenous Education rooms

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3

November 17-19, 2025

- Originally, we were planning a two-day Quelmúcw Education Council Retreat at Spirit Ridge in Osoyoos
- We are connected with the Okanagan Mainline Indigenous Regional Educators group (OMRIE) – ten districts around our region
- The other districts and their IEC's wanted to collaborate with us to have a regional gathering for IEC members to learn from each other
- Plans changed to have a one-day retreat for the Quelmúcw Education Council, and a one-day Regional IEC Gathering for the ten districts
- Two additional districts asked to be part of the Gathering as well

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4

Our Theme: e'nowkinwix™

E'nowkinwix™ is a nsyilxcn word that describes a community dialogue protocol which seeks to include diverse points of view in order to ensure a holistic strategy leading to actions that empower principles of collaboration. The process incorporates essential aspects of balancing divisive and polarizing views, into an empowering dynamic of solidarity in action.



Regional Indigenous Education Council Gathering

Theme: e'nowkinwix™

November 18-19, 2025
Spirit Ridge, Osoyoos

We acknowledge that we are holding this Regional Indigenous Education Council Gathering on the traditional, unceded, and contemporary lands of the syilx people, and we hold great respect for the inherent Rights Holders of this place, the Osoyoos Indian Band.

Our Theme: e'nowkinwix™

E'nowkinwix™ is a nsyilxcn word that describes a community dialogue protocol which seeks to include diverse points of view in order to ensure a holistic strategy leading to actions that empower principles of collaboration. The process incorporates essential aspects of balancing divisive and polarizing views, into an empowering dynamic of solidarity in action.

Gratitude to Ben Louis, a member of the Okanagan Indian Band, and a teacher and language speaker in School District 22 for his guidance on our theme.

When we reflect on Bill 40, we believe that the purpose is to provide a legislative guide for better relationships between Nations and School Districts. All districts and Indigenous Education Councils are at different places in the journey toward effective and ongoing implementation of Bill 40. Our hopes for the Regional Indigenous Education Council Gathering are to create connections with each other and to learn about some of the promising practices in our region.

Learning Together – a Community Agreement

We ask that you come to our gathering with open hearts and open minds, that you help to create a safe place for participants to be vulnerable and to engage in respectful and open conversation, with the hope of all going forward together in a good way. We ask that you take space, but also hold space for each other. There are multiple "right ways" of Indigenous communities and School Districts being in good relations with each other; our context, cultures, and experiences all contribute to how we work together effectively. Please come with open minds and open hearts. We are all better by working together for the benefit of Indigenous learners.



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5

SD6 Rocky Mountain	SD8 Kootenay Lake
SD19 Revelstoke	SD22 Vernon
SD23 Central Okanagan	SD27 Cariboo-Chilcotin
SD53 Okanagan Similkameen	SD58 Nicola Similkameen
SD67 Okanagan Skaha	SD73 Kamloops-Thompson
SD74 Gold Trail	SD83 ƛ̓wsaltktnéws ne Secwepemcú'ecw

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6

Tuesday, November 18

- Pre-Gathering activities Tuesday evening included exploring the Nk'mip Desert Cultural Centre, followed by a welcome, dinner, Loonie auction, social time, and music trivia in the Eagle Room at Spirit Ridge.
- The Nk'Mip Desert Cultural Centre was be open from 3:45-5:30pm for some welcoming activities and learning about the hosts of the land where we are holding our gathering.

3:45pm

4:00pm

5:30pm

6:00pm

7:00pm

8:30pm

Check-in at Registration Desk

Visit the Nk'Mip Desert Cultural Centre

Welcome to the Territory

Ronnie McGinnis – Council member from

Osoyoos Indian Band

Dinner and Loonie Auction

Music Trivia

Wrap-Up for the evening

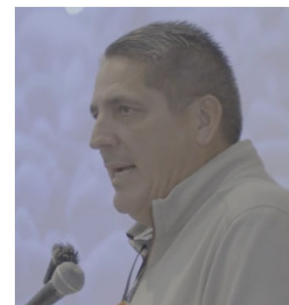
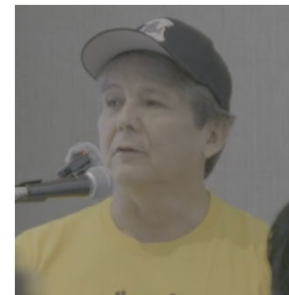
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7

Wednesday, November 19

- Welcomed by Chief Clarence Louie, Osoyoos Indian Band
- Student drumming group – Sen'Pok'Chin
- The Okanagan Song
- Brad Baker, Superintendent, Indigenous Education, Ministry of Education and Childcare



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8

Learning Bursts are short (10-15 minute), focused presentations from school districts and IEC's that highlight promising or inspiring practices, all connected to districts and IEC's working collaboratively together. These brief presentations are intended to share stories of success and innovation that others can learn from.

- SD53 (Okanagan Similkameen): OMRIE Student Summit and the Power of Student Voice
- SD8 (Kootenay Lake) Annual Youth Pow Wow
- SD22 syilx Working Group – Walking the Path Together
- SD6 (Rocky Mountain) – Shuswap on the Land Learning Days
- SD83 (K̓wsaltktnéws ne Secwepemcu'lecw) – Gift of a District Name Change (video)



<p>OUR MISSION</p> <p>OUR VISION</p> <p>OUR VALUES</p>	<p>Empowering students to become confident, curious, and caring individuals who thrive in their learning, relationships, and community</p> <p>Preparing students to become educated citizens who contribute positively to a dynamic, sustainable, and diverse world</p> <p>Belonging, Respect, Reconciliation, Empathy, Equity, Perseverance</p>
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9

Learning Together Circles are sessions that bring participants together to engage in open, respectful dialogue. Throughout the day, these circles will look different, depending on the purpose of each circle.

The Learning Together Circles in the morning are opportunities for participants to connect first with members of other IEC's, to hear about the strengths and stretches you are all experiencing, and then to re-connect with members of your own IEC to share what you have learning. In the afternoon, the first Learning Together Circle will give you the chance to stand if you are able while you connect with other participants using conversation prompts. During the other Learning Together Circles in the afternoon, you will be able to self-select an IEC "Hot Topic" that you want to learn more about at specific tables.



<p>OUR MISSION</p> <p>OUR VISION</p> <p>OUR VALUES</p>	<p>Empowering students to become confident, curious, and caring individuals who thrive in their learning, relationships, and community</p> <p>Preparing students to become educated citizens who contribute positively to a dynamic, sustainable, and diverse world</p> <p>Belonging, Respect, Reconciliation, Empathy, Equity, Perseverance</p>
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10



OUR MISSION

OUR VISION

OUR VALUES

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Regional Indigenous Education Council Gathering

Theme: e'nowkinwix^w

November 18-19, 2025
Spirit Ridge, Osoyoos

We acknowledge that we are holding this Regional Indigenous Education Council Gathering on the traditional, unceded, and contemporary lands of the syilx people, and we hold great respect for the inherent Rights Holders of this place, the Osoyoos Indian Band.

Our Theme: e'nowkinwix^w

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When we reflect on Bill 40, we believe that the purpose is to provide a legislative guide for better relationships between Nations and School Districts. All districts and Indigenous Education Councils are at different places in the journey toward effective and ongoing implementation of Bill 40. Our hopes for the Regional Indigenous Education Council Gathering are to create connections with each other and to learn about some of the promising practices in our region.

Learning Together – a Community Agreement:

We ask that you come to our gathering with open hearts and open minds, that you help to create a safe place for participants to be vulnerable and to engage in respectful and open conversation, with the hope of all going forward together in a good way. We ask that you take space, but also hold space for each other. There are multiple “right ways” of Indigenous communities and School Districts being in good relations with each other; our context, cultures, and experiences all contribute to how we work together effectively. Please come with open minds and open hearts. We are all better by working together for the benefit of Indigenous learners.



Tuesday, November 18

Pre-Gathering activities during the evening of Tuesday, November 18 include exploring the Nk'mip Desert Cultural Centre, followed by a welcome, dinner, Loonie auction, social time, and music trivia in the Eagle Room at Spirit Ridge.

The Nk'Mip Desert Cultural Centre will be open from 3:45-5:30pm for some welcoming activities and learning about the hosts of the land where we are holding our gathering.

Please be sure to be back at the Eagle Room before 5:30pm to socialize and connect with other Gathering participants before dinner and the Loonie auction begins. There is a cash bar for drinks, and a buffet dinner inspired by the Four Food Chiefs.

3:45pm	Check-in at Registration Desk
4:00pm	Visit the Nk'Mip Desert Cultural Centre
5:30pm	Welcome to the Territory Ronnie McGinnis – Council member from Osoyoos Indian Band
6:00pm	Dinner and Loonie Auction
7:00pm	Music Trivia
8:30pm	Wrap-Up for the evening



Donations for the Loonie Auction and the Door Prizes can be left at the Registration Desk.

In School District 53, they have a blanketing ceremony for Indigenous Grad, for which the Indigenous Education Department fundraises. This cause will be the worthy recipient of the funds raised during the Loonie Auction. Be sure to bring your Loonies to join in the fun, win some prizes, and support our cause!

Smudging Available Before and After the Gathering on Wednesday

For all interested participants, smudging will be available before and after the Gathering in the Market Courtyard, right by the Conference Centre.

Before the Gathering, smudging will be available from 7:45-8:45am, during the Breakfast hour.

After the Gathering, smudging will be available after we close in the same location.



Wednesday, November 19

- 7:45am** Registration desk (for those unable to come on Tuesday evening)
- 8:00am** Breakfast
- 9:00am** Chief Clarence Louie, Osoyoos Indian Band
Helen Gallagher, District Teacher of Indigenous Education
The Okanagan Song – Dyawen Louis and the Sen’Pok’Chin Drumming Group
- 9:20am** Introductions, and Focus on Eḥowkinwixʷ
- 9:30am** Address from Brad Baker, Superintendent – Indigenous Education, Ministry of Education and Childcare
- 10:00am** Learning Together Circle Session 1 – Strengths & Stretches of IEC’s
- 10:30am** Break
- 10:45am** Learning Burst Session 1 – Promising Practice from School District 53 (Okanagan Similkameen): OMRIE Student Summit and the Power of Student Voice
- 11:00am** Learning Together Circle 2: Indigenous Education Council Re-Connection Time
- 11:30am** Learning Burst Session 2 – Promising Practice from School District 8 (Kootenay Lake) and Yaqan Nukiy (Lower Kootenay Band): Annual Youth Pow Wow
- 11:45am** Leading into Lunch – time to eat, connect, and have a walk and talk
- 12:00pm** Lunch
- 12:45pm** For those who wish to join us... “The Story of Our Name – ǰwsaltktnéws ne Secwepemcúl’ecw” video
- 1:00pm** Learning Together Circle 3: Stand and Connect Activity
- 1:30pm** Learning Burst Session 3 – Promising Practice from the School District 22 syilx Working Group: Walking the Path Together
- 1:45pm** Learning Together Circle 4: Table Talk Topic (your choice)
- 2:15pm** Learning Burst Session 4 – Promising Practice from School District 6 (Rocky Mountain) – Shuswap on the Land Learning Days
- 2:30pm** Learning Together Circle 5: Table Talk Topic (your choice)
- 3:00pm** Door Prizes and Closing Words
- 3:20pm** Sending you out with purpose, power, and performance – Dyawen and Les Louis

Learning Bursts:

Learning Bursts are short, focused presentations from school districts and IEC’s that highlight promising or inspiring practices, all connected to districts and IEC’s working collaboratively together. These brief presentations are intended to share stories of success and innovation that others can learn from.

Learning Burst Session 1: School District 53 (Okanagan Similkameen): OMRIE Student Summit and the Power of Student Voice

SD 53 has attended and participated in the past three OMRIE Student Summits. These are gatherings that empower Indigenous youth to share their experiences, insights, and solutions with peers from across the



OMRIE region. One of the key takeaways that SD 53 Indigenous students had from the past two summits was wanting greater access to Indigenous Student Leadership Councils. As a result, the momentum from the OMRIE Summit has led to the creation of a district wide Indigenous Student Advisory Council. This is an initiative focused on fostering safe, inclusive, and collaborative school environments that elevate Indigenous student voice. Members of the Advisory Council will share how the OMRIE Summit has influenced their perspectives and outline the next steps for continuing this important work.

Learning Burst Session 2: School District No. 8 (Kootenay Lake) Annual Youth Pow Wow:

The Annual Youth Pow Wow is an annual event open to all students in the district. The SD8 Youth Pow Wow is an opportunity for Indigenous students to proudly connect with their culture. This event helps to raise up and amplify the voices, experiences, and lives of Indigenous students, families, and community members, while providing an opportunity for non-Indigenous students, families, and community members to move towards allyship and reconciliation through deep learning, listening, witnessing, and participating. The planning, pre-event activities, and the pow wow itself is done in collaboration with Yaqan Nukiy (Lower Kootenay Band) and is entering its 13th year in the district.

Learning Burst Session 3: The SD22 syilx Working Group – Walking the Path Together:

SD22 has been working collaboratively with the Okanagan Indian Band on the co-development of syilx focused curriculum and resources for a number of years. Working closely and in partnership with OKIB, SD22 has been able to share with educators the locally developed Story of Our Sqilxw Ways resource and teaching guide, the Four Food Chiefs Core Competencies Student Self-Assessment, and most recently the BAA syilx Foundations 11. Through the creation of these resources that center syilx people and teachings, we have grown and learned together. What began as an informal partnership is evolving into formal working group that will develop clear processes to ensure that the OKIB voice is centered in the syilx resources and curriculum.

Learning Burst Session 4: School District No. 6 (Rocky Mountain) – Shuswap on the Land Learning Days:

The Shuswap Band collaborated with Rocky Mountain School District (RMSD) staff to host three “On the Land Learning Days” for Indigenous students from two elementary schools. Students had the opportunity to learn from Shuswap Band biologists, Guardians, Knowledge Keepers, and Elders about archaeology, salmon, plants, legends, and traditional games. The Shuswap Band generously provided all time and resources free of charge to the district. This was an incredible opportunity for our students and staff to learn and to connect with the land, one another, and their culture.

Learning Together Circles:

Learning Together Circles are sessions that bring participants together to engage in open, respectful dialogue. Throughout the day, these circles will look different, depending on the purpose of each circle. For example, the Learning Together Circles in the morning are opportunities for participants to connect first with members of other Indigenous Education Councils, to hear about the strengths and stretches you are all experiencing, and then to re-connect with members of your own IEC to share what you have learning. In the afternoon, the first Learning Together Circle will give you the chance to stretch your legs and stand if



you are able while you connect with multiple other participants with a series of conversation prompts. During the other Learning Together Circles in the afternoon, you will be able to self-select an IEC “Hot Topic” that you want to learn more about at specific tables.

Learning Together Circle 1:

During the first Learning Together Circle, you will have the opportunity to connect with three other people who are members of other Indigenous Education Councils. Take a look in your name tag. You will have a card with one of the Four Food Chiefs. Find a group of three other people (group of four) who have the cards of the other Four Food Chiefs (Black Bear, Spring Salmon, Saskatoon Berry, and Bitter Root).

Learning Together Circle 2:

This is an opportunity for you to connect with members of your own IEC at your original table to share what you learned from the first Learning Together Circle, in which you heard about and shared strengths and stretches of the journey toward Bill 40 implementation.

Learning Together Circle 3:

During this Learning Together Circle, you will have the opportunity to stand up and connect with other participants for three rounds of question prompts that are previews of the table talk topics.

Learning Together Circles 4 and 5:

You will have two opportunities this afternoon to join different discussion tables. Choose topics that are meaningful for your IEC.

Sending You Out with Purpose, Power, and Performance:

Lower Similkameen Indian Band members Dyawen Louis and Les Louis will perform two songs to send us out on a positive note and in a good way, to celebrate the learning we have gained during our gathering.



Kukwtsetemc and liml̓amt

So many thanks to the Regional IEC Gathering Planning Committee and the Spirit Ridge Resort. Specific thanks to Chief Clarence Louie, Brad Baker, Dyawen and Les Louis, Councillor Ronnie McGinnis, Helen Gallagher, Indigenous Education Advocates from School District 53, Ben Louis, Tony Pulido, Aimee Baptiste, David Sookinakin Wilson, and Ryan Baptiste. Thank you to all the IEC's, districts, and individuals for the donations for the Loonie Auction and door prizes. The Gathering is an important opportunity for us to learn from each other in a good way, reflecting the spirit of eḥowkinwixʷ and the strength of our shared commitment to Indigenous Education and Indigenous learners.



November 25, 2025

Ref: 312805

Vice Chair Kevin Flynn
Columbia Shuswap Regional District (CSRD)
Email: kflynn@csrd.bc.ca

Dear Vice Chair Flynn:

I am writing to thank you for meeting with me on September 23, 2025, at the Union of BC Municipalities Convention (UBCM) in Victoria. We appreciate your understanding as my response was delayed due to labour action.

The theme at this year's convention, *Charting the Course*, speaks to the importance of engaging with community leaders and those that work together to shape and guide progress and change. I encourage you and your council to continue to work closely with your local board of education to support children, youth and their families in your community for both childcare and education needs.

I appreciate you advocating for your community and taking the time to meet with me. Your partnership in this work is truly appreciated.

Sincerely,

Lisa Beare
Minister

cc: Donna Kriger, Superintendent, School District No. 83 (North Okanagan-Shuswap)
Corryn Grayston, Board Chair, School District No. 83 (North Okanagan-Shuswap)



December 11, 2025

Ref: 314361

Parent Advisory Council
 Sorrento Elementary School
Email: sorrentoelementarypac@gmail.com

Dear Sorrento Elementary School Parent Advisory Council:

Thank you for your letter of November 5, 2025, which I received November 25, 2025, regarding children who require additional supports to ensure they receive the help they need in school. I would also like to thank you for sharing some personal stories from parents in your school community.

The Ministry of Education and Child Care is committed to inclusive education, ensuring all students, including those with disabilities or diverse abilities, have equitable access to quality education and learning opportunities. Education assistants play a key role in this regard and that is why their recruitment and retention is a priority for the Ministry, as indicated in my [mandate letter](#).

It is important to note that in the governance model for the British Columbia education system, local boards of education have authority to determine the delivery of education programs in their schools, including decisions related to resource allocations, human resources, and specific student services. The Ministry sets provincial regulations and policies, provides funding, and monitors student success. The Ministry continues to work with school districts and other education partners to facilitate the educational success of all students.

I know that many school districts across the province are experiencing staffing challenges, particularly for education assistants (EAs). A key goal of the Ministry is to improve equity of access and outcomes for students and to maintain a supportive environment so that they can learn and thrive. Education Assistants play a key role in that regard, which is why the Ministry is working with the sector on the implementation of a K-12 Workforce Plan to support the recruitment and retention of an engaged and qualified workforce, both for teachers and support staff. Ministry staff are working with employers, unions, post-secondary institutions, Indigenous organizations and other partners on this important work.

.../2

Thank you again for taking the time to write.

Sincerely,

A handwritten signature in black ink, appearing to read "Lisa Beare". The signature is fluid and cursive, with the first name "Lisa" and last name "Beare" clearly distinguishable.

Lisa Beare
Minister

cc: Corryn Grayston, Chair, Board of Education, School District No. 83 (North Okanagan-Shuswap)
Dona Kriger, Superintendent, School District No. 83 (North Okanagan-Shuswap)