

A large, stylized blue outline of a house with a chimney on the right side, serving as a background for the title.

# Charter Schools Handbook

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Alberta 

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Charter Schools Handbook

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For more information regarding this content visit: <https://www.alberta.ca/charter-schools.aspx>

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# Overview

Charter schools were established in Alberta through legislation in March 1994.

This handbook is intended to assist Albertans in understanding charter schools in Alberta and to assist charter organizers with their planning and preparation for their charter school application and subsequent operations.

## What is a Charter School?

A charter school is a public school that provides a basic education in a different or enhanced way to improve student learning and contributes to educational choice.

The expectation for the educational services offered by charter schools is that they will be different from what is locally available. Charter schools must demonstrate the potential to improve student learning. In general, charter schools complement the educational services provided in the local public system. They represent an opportunity for successful educational practices to be recognized and adopted by other public schools for the benefit of more Albertans. Although types of charter schools vary across the province, they have the following characteristics.

**Access** – Charter schools cannot deny access, if sufficient space and resources are available, to any students who meet the requirements of section 3 of the *Education Act*. Section 11(3) further outlines responsibilities to students in need of specialized supports and services. In other words, any student may attempt a program provided by a particular charter school. For more information, see “Selection” on page 7.

**Charter** – A charter is an agreement between the Minister of Education and an individual or group regarding the establishment and administration of a charter school. The charter describes the unique educational service the school will provide, how the school will operate and the student outcomes that it intends to achieve.

**Choice** – A charter school provides enhanced or innovative delivery of public education to students. This means that parents and students have increased opportunity to choose an education that best serves student needs.

**Curriculum** – The programs of study (curriculum) delivered by charter schools is structured around a basic education as defined by Alberta Education and described in provincial curriculum in accordance with the *Ministerial Order on Student Learning #028/2020* that focuses on literacy and numeracy. Generally, education programs must meet the conditions outlined in section 18 of the *Education Act*. This allows students to transfer to or from any public school with a minimum of disruption and to obtain a high school diploma. In addition, students attending charter schools

must write provincial assessments including provincial diploma exams and any other tests the Minister prescribes.

**Funding** – Charter schools are eligible for provincial funding. For information on grant allocations, please refer to the *Funding Manual for School Authorities* for the current school year.

**Non-religious** – Charter schools may not be affiliated with a religious faith or denomination. A charter school may provide religious instruction and exercises under section 58 of the *Education Act*, as may any other public school. Charter schools are not private religious schools, nor are they intended to replace the services offered by private religious schools.

**Purpose** – Charter schools are expected to improve student learning by providing a different educational environment beyond the services provided by the existing local school board. Charter boards that operate schools have flexibility and considerable autonomy to implement innovative or enhanced educational services that broaden the range of educational opportunities and enhance student learning. Charter schools with a focus on vocation-based education may also be established to provide new and different educational opportunities in a community. Enhanced student learning means improved acquisition, in some measurable way, of knowledge, skills and attitudes.

**Research** – Charter schools must have the potential to improve the education system as a whole and enhance education research and innovation. Charter schools are expected to demonstrate collaboration or engagement with a post-secondary institution or a school authority. The preliminary application to the Minister must include independent research supporting the proposed charter school program.

**Specialization** – Charter schools specialize in a particular educational service or approach in order to address the needs of a particular group of students. Charter schools may complement or add to existing local programs where there is a sufficient number of students who could benefit from the program.

**Tuition Fees** – Charter schools shall not charge tuition fees. However, they may charge parents of a student fees and costs, subject to section 26(5) of the *Education Act*, *School Fees Regulation* and *School Transportation Regulation*.

**Vocation-based education** – The Minister may approve a charter where the focus is an apprenticeship program or an education program in a designated occupation within the meaning of section 1 of the *Apprenticeship and Industry Training Act* or a science, technology, engineering and mathematics (STEM) focused program.

## What is a Charter Board?

A charter board is a corporate body responsible for operating and governing one or more charter schools. All schools run by a single charter board are subject to the same charter and governance procedures. The rights and responsibilities of a charter board are listed below.

**Accountability** – Each charter board is accountable for its charter school(s). A board is responsible for ensuring that the charter school complies with charter board procedures and the terms of the charter, as well as provincial legislation, regulation and policies. Section 17 of the *Charter Schools Regulation* authorizes the Minister to repeal a charter if these terms are not being met, after notifying the charter board of a significant issue and giving the charter board a reasonable period of time to satisfy the Minister's concerns.

A charter board is accountable to the students, parents, community and the Minister of Education. The Minister ensures that the charter school is operated according to its charter, and that it achieves the outcomes outlined in the charter as required by provincial legislation, regulation and policies.

As with any school board, a charter board is publicly accountable for student achievement in the school. The charter board must make publicly available annual reports that describe how well students are accomplishing their educational goals, certain documents and reports under section 65 of the *Education Act*, and any other information requested by the Minister (section 66 of the *Education Act*).

As part of the charter renewal process, charter boards participate in an evaluation process described in sections 7 and 8 of the *Charter Schools Regulation*. The Minister must conduct at least one evaluation within the school's current term. Typically, the department conducts a fulsome evaluation of the charter school in the third year of a five-year term and the twelfth year of a fifteen-year charter term in preparation for the charter school's anticipated request for renewal of the charter.

**Autonomy** – A charter board has the authority and autonomy to operate a charter school. The board develops governance procedures subject to its charter agreement with the Minister of Education. Typically, a charter board provides direction through the superintendent of the charter school. The school administration conducts the day-to-day operations.

**Financial Reporting** – A charter board must appoint an independent auditor, establish an audit committee, and annually submit an Alberta Education Budget Report Form and an Audited Financial Statement. These must reflect the financial operation of the charter school. In addition, charter boards must operate within a balanced budget (sections 137 to 143 of the *Education Act*).

**Governance** – A charter school is operated by a corporate body in accordance with section 24(1) of the *Education Act*. The charter school may be governed by the board of directors of the corporate body, or the board may establish under it another body whose sole responsibility is the governance of the charter school. In either case, this governing body is called the charter board, and its membership should represent parents and teachers of students in the school as well as community members. In accordance with the provisions of the *Societies Act* or the *Companies Act*, the charter board must have by-laws and procedures for governance of the board as well as for governance of the charter school.

**Non-profit** – Charter schools are non-profit schools operated by non-profit corporate entities.

**Renewal** – Charter boards receive an initial term of five years. Boards may apply for an additional charter term of five years or 15 years by December 1 of the final year of their charter term. In order to receive approval for a 15-year term, boards must submit proof of meeting enhanced criteria described in section 8 of the *Charter Schools Regulation* (strong student achievement, strong indicators of continuous improvement, strong engagement initiatives, and innovative learning environments).

**Reviews** – As part of the public education system, students of charter schools or their parents may ask the Minister to review any charter board decision about the expulsion of a student (section 43 of the *Education Act*). In addition, the *Charter Schools Regulation* allows for a review by the Minister if a student has been refused enrolment in a charter school. The disqualification of a charter board member under section 87 (except subsections 1(a) and (2) and section 88 of the *Education Act*) may also be reviewed by the Minister.

**Selection** – Charter boards determine the student enrolment of each of its schools based on considerations that include resources, staffing and space in the context of the terms of its charter, while ensuring compliance with municipal zoning bylaws and all applicable municipal and provincial public health, fire, safety and building standards requirements.

If student enrolment exceeds the capacity of a program, the school selects students in accordance with a selection process established by the charter board. The selection process may set priorities in such matters as attendance areas, access for siblings, and the order in which applications were received. The selection process must be open and fair. For more information, see “Reviews” on this page.

**Staffing** – Charter boards are regulated by the *Labour Relations Code*, the *Employment Standards Code* and all professional quality standards. Teachers employed at charter schools must be certificated. Other staffing arrangements are subject to the decisions made by the charter board in compliance with the provisions of the charter and with provincial legislation, regulations and policies.

## Things to Consider Before Preparing an Application

Before applying for charter school status, prospective applicants should give careful thought to the following.

- Why do we need a charter school?
- Is this educational program already available locally?
- Can the program be provided locally?

Individuals or groups, whether parents, teachers, or some other stakeholder group, must follow these steps in seeking approval to open a charter school.

Applicants must consider if a program already exists as an entity within a local school board.

The individual or group must be able to demonstrate that the charter program being requested focuses on a learning style, a teaching style, approach or philosophy or pedagogy that is not already being offered by the school board of the school division in which the charter school will be located.

Before preparing the application, the charter organizers should consider the following.

- Is there evidence of significant support from the community in which the school is to be located, especially from local parents and students?
- Is there a body of independent research to support the assertion that the proposed educational program will potentially improve student learning in a way that can be measured against other schools not belonging to the same charter board?
- Is the proposed program innovative, in that it expands choice in the geographical area where it will be established?
- Does the proposed program include collaboration or engagement with a post-secondary institution or a school division?
- Does the proposed program incorporate vocation-based education programming?

If the answer to each of the above questions is yes, then charter organizers may apply directly to the Minister of Education for a school charter. The application must meet the criteria set forth in the *Charter Schools Regulation*. The Minister of Education reviews the application based on how well it furthers the province's purposes for establishing a charter school, which are to:

- provide parents and students with greater opportunities for choice within the public education system;
- provide increased opportunities for student learning within the public education system;
- stimulate the development of enhanced and innovative programs within the public education system;
- provide teachers with a vehicle for establishing schools with enhanced and creative methods of educational instruction, school structure and management; and
- encourage the establishment of outcome-based education programs.

For assistance with the application process, see Appendix A.

# Questions and Answers

## Eligibility

### 1. Who is eligible to apply for a charter to start a charter school?

Applicants can include parents, teachers and/or community members. Applicants must be incorporated according to section 24(1) of the *Education Act*. This section states that a charter school can be operated by a society incorporated under the *Societies Act*, or by a company registered under Part 9 of the *Companies Act*.

## Governance

### 2. Why are statements about the philosophy, purpose and goals for each charter school so important?

The philosophy, purpose and goals define a charter school's reason for existence. These statements show how the school meets an educational need that is not being met by the local school board. The statements should be measurable, tied to improved student learning, and should form the basis for educational decision-making.

### 3. What are the responsibilities of a charter board?

A charter board must understand the ways of selecting its members, the roles and responsibilities of the members, the relationship between the charter board and the charter school, and the school council's roles and responsibilities. The charter board should be guided by the philosophy or focus of the charter.

Other duties of a charter board include the development and implementation of a student code of conduct, a policy for discipline, suspension and expulsion, personnel policies, and a management operation plan. Section 14 of the *Charter Schools Regulation* sets out further responsibilities of a charter board.

A charter may be repealed by the Minister of Education if it is determined that the charter board is not meeting its charter or provincial commitments. The Minister's decision is final.

### 4. Are charter schools required to have school councils?

Each charter school must establish a school council, as required by section 55 of the *Education Act*. The majority of the school council membership must be parents of students enrolled in the school. Students and teachers may also be represented on the school council. The principal's role on the school council is defined in section 55 of the *Education Act*.

**5. Does a charter school require a principal?**

Section 202(2) of the *Education Act* states that a board shall assign a principal to each school. Section 197 outlines the responsibilities of the principal. Both sections apply to charter schools.

**6. Must charter boards use the services of a school superintendent?**

As per sections 222 and 224 of the *Education Act*, a charter board shall make provision for acquiring the services of a person who is approved by the Minister of Education to serve as a superintendent to fulfill those functions required by provincial legislation, regulations and policies. For example, a recommendation for permanent certification of a teacher must be made by a superintendent.

**7. Must charter boards have a secretary-treasurer?**

Section 68 of the *Education Act* requires that a secretary-treasurer be appointed and that person must be bonded. The Minister of Education shall be notified of this appointment. This does not have to be a full-time position.

**8. How can a charter be amended?**

A charter agreement must include a process to change the charter. It is important that parents and teachers be consulted as part of the amending process. Any amendment requires the approval of the Minister of Education before implementation.

**9. Can a charter board sign contracts?**

A charter board is a corporate body and may enter into contractual arrangements to comply with the *Education Act* and meet the requirements of the charter. Before commencement, the charter board must provide to the Minister of Education any contractual arrangements that it plans to make, which may include: leasing arrangements, superintendency and secretary-treasurer services.

## **Accountability**

**10. Why charter boards are held accountable?**

A charter board promises to improve student learning beyond the services provided by the local school board. So that the charter school(s) may achieve this goal, the charter board is provided with increased flexibility and autonomy. Consequently, this obligation must be balanced with an accountability requirement to ensure that the charter board is achieving the results that it has committed to.

The operation of a charter school is reviewed as outlined in the *Education Act* and the *Charter Schools Regulation*.

**11. Do the accountability requirements of a charter board exceed those of a local school board?**

Charter boards must be accountable for their operation and results just as other public school boards are accountable under the assurance framework outlined in the *Funding Manual for School Authorities*. In addition, charter boards must demonstrate that implementation of the charter goals has resulted in improved student learning outcomes and growth.

**12. If a particular charter school has demonstrated success with its program, will permanent charter status be awarded?**

All charters are term-specific and renewable. Each renewal is determined largely by the results of regular school evaluations. When a charter school continues to demonstrate success and meets all the criteria identified in the *Charter Schools Regulation*, its charter may be renewed upon request.

**13. Can a charter board ask the local school board to take over the operation of a successful charter school?**

The charter board may decide to turn over the operation and governance of a successful charter school to the local school board. Under these circumstances, the charter school would be dissolved through the process outlined in the charter. It is expected that the local school board would then adopt the successful educational practices of the charter school.

**14. Must the charter school be housed in a particular type of facility?**

The *Education Act* broadly defines a school as a structured learning environment through which an education program is offered to students. However, there is an expectation that whatever facility is used will support the philosophy and learning expectations of the school. The school facility must also comply with provincial legislation and local by-laws regarding health, safety, fire and zoning. A charter school may use all or part of an existing school, a private or public facility, or any other suitable location. The charter board may own, lease or rent its facility, subject to the *Municipal Government Act* which may restrict ownership of buildings on reserve land.

## **Programs**

**15. How will the Minister know if student achievement is meeting expectations?**

Charter organizers are responsible for designing a student assessment model that will accurately measure how well students are achieving learning expectations. The results and data are shared with the Minister as part of the yearly assurance process and regular evaluations conducted by the department.

**16. Since access cannot be denied to any student, must a charter address the needs of all potential students, including those with special needs?**

A charter school is intended to focus on a particular learning style, teaching style, approach or philosophy or pedagogy that is not already offered by a school division. The chosen learning style, teaching style, approach or philosophy or pedagogy may not be a perfect fit for all potential students. A charter must include a description of the students that the school is intended to serve. However, a charter school must make enrolment decisions in a manner consistent with the *Alberta Human Rights Act*. This means, for example, that a charter school cannot deny enrolment to a student who needs specialized supports and services solely on that basis if the student is otherwise eligible for learning under that charter school's particular learning style, teaching style, approach or philosophy or pedagogy.

Charter schools do not have resident students under section 4 of the *Education Act* for whom they are responsible for providing an education program. That said, charter schools do have responsibilities to students enrolled in their school, including the obligation to provide a continuum of supports and services to students that is consistent with the principles of inclusive education, section 33(e) and specialized supports and services in accordance with section 11(2)-(6) of the *Education Act*.

**17. Can students with behavioural problems be denied access to a charter school?**

Charter schools cannot engage in discriminatory behaviour that is contrary to the *Alberta Human Rights Act*. The charter school must have a discipline policy, which is to be applied equally to all students. Any student who is expelled from a charter school can request the Minister to review this matter.

## **Students**

**18. Is there a minimum student enrolment?**

At school opening, the minimum student enrolment is set at 100 students, or another number that, in the opinion of the Minister of Education, is high enough to ensure that the school is financially and educationally viable. The financial and educational viability of a charter school is paramount. Charter organizers must be aware that low student enrolment may result in a deficit or may compromise student achievement. Charter boards must maintain a balanced budget and are required to show that they are improving student learning.

## **Teachers**

**19. Must charter schools employ certificated teachers (including principals) for instructional purposes?**

All teachers offering instruction and the principal, must hold a certificate of qualification. In Alberta, all teachers including charter school teachers are expected to meet the *Teaching Quality Standard* throughout their careers. Principals are expected to meet the *Leadership Quality Standards*.

**20. Must teachers (including principals) be active members of The Alberta Teachers' Association (ATA)?**

Teachers employed by a charter board are not eligible to be active members of the ATA under the *Teaching Profession Act*, but may choose to be associate members. If a charter board chooses to engage the services of a teacher through a secondment with a school board or employ a teacher who has taken a leave of absence from the school board, the teacher remains an employee of the school board and is required to be an active member of the ATA.

**21. Must charter school teachers contribute to the Teachers' Retirement Fund (TRF)?**

Any teacher employed by a charter school must contribute to and will receive benefits from the TRF. The *TRF Act* was amended in 1994 to include charter school teachers.

## **Grants**

**22. What Alberta Education grant allocations are available to charter schools?**

See the current *Funding Manual for School Authorities*, available on Alberta Education's website at <https://open.alberta.ca/publications/1485-5542>.

**23. Will start-up grants be available to charter schools?**

Funding is not available for start-up costs. However, Alberta Education may advance payments taken from the projected charter school grant allotment for the year. This would be a one-time advance.

**24. Is the charter school eligible to raise funds in addition to provincial grants?**

Charter schools are able to fundraise and accept donations, similar to public schools. Any gifts, grants, donations, student or parent fees, charges for student or school services, benefits, and any other assets the charter school may obtain in addition to provincial grants, must be included in the charter school's annual financial report.

**25. Do provincial grants flow directly to the charter board?**

Provincial grants flow directly to the charter board.

**26. What happens to a surplus or deficit of the charter board when a charter school ceases to operate?**

A balanced budget is required, so a deficit is not permitted. Any surplus that can be attributed to provincial funding will be returned to the provincial treasurer.

**27. Are charter board and school council members eligible to receive payment for their services?**

Members of the charter board and members of the charter school council are not eligible for any honoraria, payments or benefits for any services provided. However, travel and subsistence expenses may be paid.

## **Applications**

**28. At what point in the application process must conditions stated in the *Charter Schools Regulation* be met?**

All criteria required by the *Charter Schools Regulation* must be completed before final approval is granted. However, preliminary approval may be granted enabling charter organizers to continue proceeding with the procurement and organization of facilities, resources and services. The *Charter Schools Regulation* specifies the information that charter organizers are required to provide to the Minister of Education before preliminary approval may be granted.

It is important that charter organizers have a clear understanding of how their school will look and operate and how it will demonstrate improved student learning.

**29. Must charter schools provide transportation for their students?**

As section 59 of the *Education Act* does not apply, charter boards are not required to provide transportation. However, parents should be told whether the charter board has made arrangements for transportation.

**30. Must charter boards be insured?**

Any charter board must, at a minimum, carry insurance in accordance with section 54(1) of the *Education Act*. The secretary-treasurer must be bonded in accordance with section 68(c) of the *Education Act*. The charter board also will be required to carry indemnification insurance to cover any financial obligations that cannot be met. The Minister of Education cannot be held liable for any unmet financial obligations of a charter board.

# Appendix A: Applying for Charter School Status

## I. Steps to Follow

### A. Preliminary Planning

Prior to submitting an application, a person or a group of individuals should work on the charter school concept by:

1. Deciding which learning style, teaching style, approach or philosophy or pedagogy should be implemented in the proposed charter school.
2. If the charter school does not focus on vocation-based education, determine if the learning style, teaching style, approach or philosophy or pedagogy is unique and is not already offered by the local public or separate school board or francophone regional authority operating within the geographic area in which the charter school will be located. Many vocational education programs are highly regulated and thus may resemble vocational education programs in the local school board.
3. If the purpose of the charter school is primarily a focus on vocation-based education, ensure that it includes apprenticeship programs or education programs in designated occupations within the meaning of section 1 of the *Apprenticeship and Industry Training Act* or a STEM-focused program.
4. Reflecting on how the proposed charter school has the potential to improve student learning outcomes.
5. Reflecting on opportunities for collaboration or engagement with a post-secondary institution and/or a school division.
6. Reflecting on how the proposed charter school has the potential to provide improvements to the education system as a whole.
7. Reflecting on how the proposed charter school may enhance education research and innovation in Alberta.

### B. Preliminary Application

Once charter organizers have decided to proceed with an application for charter status:

1. Charter organizers submit a preliminary charter school application in writing directly to the Minister of Education no later than June 1 of the year preceding the year in which the charter school is to open.
2. Charter organizers must follow the requirements detailed in the *Charter Schools Regulation* when preparing their application (see “Charter School Application Requirements” on page 19.) A committee may be appointed to review the application and advise the Minister of its recommendations.

C. Notification of a Charter Application

On receipt of a preliminary charter school application, the Minister of Education will notify every board of a public or separate school division and francophone regional authority in the geographic area of the proposed charter school, as well as operators of any other charter school as determined by the Minister. This process allows school authorities an opportunity to provide information or feedback to the Minister that can inform the Minister’s decision about the proposed charter school’s preliminary or final application, including information about any alternative programs that currently exist in the geographic area.

D. Minister Decision on a Preliminary Application

The Minister then has 60 calendar days to decide whether to request additional information, approve the preliminary application as submitted, approve it with conditions, or reject it stating the reasons for doing so. This decision will be final. The Minister must inform the applicants within 15 calendar days of making a decision.

E. Final Application

After providing the Minister with additional information and addressing any of the conditions outlined in the Minister’s letter of approval of a preliminary application, the charter applicants must submit a final charter school application in writing no later than November 1 of the year preceding the year in which the charter school is to open. Charter applicants must follow the requirements detailed in the *Charter Schools Regulation* (see “Charter School Application Requirements” on page 19). Applying on or before November 1 allows time for the Minister’s decision and provides time for the applicant to complete the requirements of section 6 of the *Charter Schools Regulation* prior to the commencement of the charter school operations.

F. Minister Decision on a Final Application

The Minister of Education has 60 calendar days to decide whether to request additional information, approve the final application and charter as submitted, approve them with conditions, or reject them stating the reasons for doing so. This decision will be final. The Minister must inform the applicants within 15 calendar days of making a decision.

G. Commencement of Operations

Before a charter school begins operations, the charter board must follow the requirements detailed in the *Charter Schools Regulation* (see “Charter School Application Requirements” on page 19.)

## II. Charter School Application Requirements

A potential charter school should ensure that application documentation sent to Alberta Education addresses the following points.

- Charter applicants indicate their plans to gather data to ensure that performance measurement will show clear evidence of success. Performance measurement will demonstrate that outcomes have been successfully attained in:
  - those unique aspects of philosophy, vision and purpose written as charter goals that set the school apart from other schools;
  - improved student learning; and
  - goals required of all public schools in Alberta.
- The school will operate in a manner consistent with:
  - all applicable provisions of the *Education Act*;
  - current provincial programs of study (curriculum); and
  - current *Funding Manual for School Authorities*.
- The school will be administered and governed effectively.
- The school will be viable and fiscally responsible.
- The school program will be successful in the eyes of the students, parents, school council, staff, community, and Alberta Education.
- Other public schools in Alberta will have the opportunity to learn from the charter school's innovative programming and techniques.

The information provided organizes the required documentation into stages for submission to the Minister of Education. This approach allows applicants to determine if the Minister will approve a proposed concept prior to undertaking the additional tasks identified in the final application stage.

Applicants are asked to label one section of the final application as “The Charter.” Information to be included in that section of the final application is provided on page 22.

After the Minister has given final approval to an application, some additional information, identified as Commencement Information, will be required near the time of school opening.

**A. Preliminary Application – Required Information (section 3(3) of the *Charter Schools Regulation*)**

Deadline – June 1 of the calendar year prior to proposed school opening

The following are required as part of the preliminary application:

- 
- ☐ Request in writing to the Minister of Education for approval for the new charter school.
  - ☐ Name, address, telephone number and, if available, fax number and email address of the applicant.
  - ☐ The proposed name of the charter school.
  - ☐ The particular teaching philosophy, vision and purpose of the charter school.
  - ☐ If applicable, vocation-based charter schools indicate their intention to focus on apprenticeship programs or education programs in designated occupations within the meaning of section 1 of the *Apprenticeship and Industry Training Act* or a STEM-focused program.
  - ☐ Goals of the charter school written as measurable outcomes.
  - ☐ Description of the improved student learning outcomes to be attained by students.
  - ☐ Statement explaining how the program to be offered by the charter school is significantly different from the programs offered by the local school board (except for apprenticeship programs in vocation-based education programs that must adhere to specified expectations).
  - ☐ Description of the students for whom the school is intended.
  - ☐ Independent research supporting the proposed charter school program.
  - ☐ Proposed opening date for the charter school.
  - ☐ A parent declaration, in the form prescribed by the Minister, signed by parents, indicating their intention to enrol their children in the charter school (minimum 100 students).
  - ☐ Projected student enrolment, grade distribution and school building requirements on the proposed opening date of the charter school.

**B. Final Application – Required Information (section 3(8) of the *Charter Schools Regulation*)**

Deadline – November 1 of the calendar year prior to the proposed school opening.

The following are required as part of the final application:

- 
- ☐ Application in writing to the Minister of Education for approval for the new charter school.
  - ☐ Proof that the applicant is a society incorporated under the *Societies Act* or a company registered under Part 9 of the *Companies Act*.
  - ☐ Proposed charter for the school (see page 22).
  - ☐ Measures to be used to determine the outcomes referred to in sections 25 (1)(a), (b) and (d) of the *Education Act*.
    - Measures from the charter goals that will assess the effectiveness of a different learning style, teaching style, approach or philosophy.
    - Measures that will assess improved student learning outcomes.
    - Measures that will assess provincial goals.
  - ☐ Indications of significant community support for the charter school.
  - ☐ Selection criteria to be used if enrolment applications by students exceed the maximum student capacity of the school.
  - ☐ Policy development plan.
  - ☐ Charter school budget report in the form prescribed by the Minister.
  - ☐ Programs of study (curriculum) to be offered in addition to the Alberta provincial curriculum, and particular innovative teaching strategies and methods to be used to promote increased student learning.
  - ☐ Description of the process by which successful charter school innovations will be communicated to the education community.
  - ☐ Roles and responsibilities of the charter board and the parents.
  - ☐ Projected student enrolment, grade distribution and school building requirements at the end of the initial term of the charter.
- Note:** Applicants may choose to submit all the information contained in the preliminary and final applications at one time no later than November 1 of the year preceding the year in which the charter school is to open.

### C. The Charter – Required Contents (section 4 of the *Charter Schools Regulation*)

The Minister of Education must approve any amendment to the charter. The charter should be packaged as an identifiable component of the final application and contain the following elements:

- 
- ☐ Particular teaching philosophy, vision and purpose of the school.
  - ☐ Vocation-based charter schools identify the elements of their programming that align with the definition found in section 1 of the *Charter Schools Regulation*, apprenticeship program or an education program in a designated occupation within the meaning of section 1 of the *Apprenticeship and Industry Training Act* or a STEM-focused program.
  - ☐ Goals of the charter school written as measurable outcomes.
  - ☐ Description of the improved student learning outcomes to be attained by each student.
  - ☐ Period during which the school is to operate.
  - ☐ Name of the society or company that is to operate the school.
  - ☐ Description of the students for whom the school is intended.
  - ☐ Grade levels to be offered at the school.
  - ☐ Curriculum to be offered by the charter school that is in addition to the Alberta provincial programs of study (curriculum).
  - ☐ Description of the process by which successful charter school innovations will be communicated to the education community.
  - ☐ Description of the type of collaboration or engagement the charter school will have with a post-secondary institution or a school division.
  - ☐ Roles and responsibilities of the charter board and the parents.
  - ☐ By-laws or articles of association of the charter board.
  - ☐ Projected student enrolment, grade distribution and school building requirements from the beginning to the end of the initial term of the charter.
  - ☐ Description of the process by which the charter may be amended.
  - ☐ Description of the process by which the charter school may be dissolved, including:
    - the form of notice of dissolution to be given by the charter board to parents and other interested persons or groups;

- the transfer of students to other schools; and
- the disposition of real and personal property and financial, school and student records.

#### **D. Commencement Information**

Deadline – June 30 in the year the charter school opens.

The following are required prior to commencement:

- 
- ☐ Proof that the school will have at least 100 students enrolled in it.
  - ☐ Name of the superintendent appointed in accordance with section 222 of the *Education Act*.
  - ☐ Name of the secretary-treasurer appointed in accordance with section 68 of the *Education Act*.
  - ☐ Plans to ensure that parents of students enrolled or seeking enrolment in the charter school are aware of transportation arrangements.
  - ☐ Names and certificate numbers of the individuals who will be teachers at the charter school, including the principal.
  - ☐ Location of the school building.
  - ☐ If the school building is leased from the private sector, proof of compliance with municipal zoning by-laws and all applicable municipal and provincial public health, fire, safety and building standards requirements.
  - ☐ Updated school budget report in the form prescribed by the Minister.
  - ☐ Details of any contractual arrangements to be made between the charter board and the Minister, a board, or any other person.

### III. Charter School Considerations

The following questions are included to guide charter school organizers in providing a detailed description of their school. Applicants may include additional information to give the Minister a better understanding of the philosophy and purpose of the proposed charter school and to assist him in making his decision.

#### 1. Charter School Facility

- a. What is the expected student enrolment on school opening?
- b. What is the maximum student enrolment capacity in five years?
- c. What is the desired date of school opening?
- d. What are the projected grade levels of students at opening and in five years?
- e. Describe the proposed facility in as much detail as possible. What are the specific requirements? Where should it be located? Does the facility support instruction and learning for the Alberta provincial programs of study (curriculum)?
- f. Have you read Alberta Education's Capital School Manual for further information about facilities?

#### 2. Evidence of Support

- a. What community backing exists for the proposed charter school (your answer may include evidence of tangible support from teachers, parents, students, community leaders and others).
- b. What supporting evidence is included to support the projected enrolment and parent commitment?

#### 3. Funding

- a. Does the Budget Report Form clearly identify all revenues and disposition of any gifts, grants, donations, student or parent fees, student or school services, benefits or any other assets the charter school may obtain in addition to provincial grants?
- b. Does the Budget Report Form reflect a balanced budget?
- c. What funding provisions have been made for charter school start-up?
- d. Has the charter board made financial arrangements with financial institutions for emergency funding?

#### 4. School Operations (if known at time of application)

- a. Is there a description of the school operation in terms of the following?
  - School opening and closing date.
  - Number and days of school operation.

- Length of the school day.
  - Number and length of recesses.
  - Number of daily hours of instruction.
  - Number of yearly hours of instruction (refer to *Guide to Education* for required hours of instruction for different grade levels).
- b. Is a school timetable prepared?
- c. What is the expected student enrolment in each grade level?
- 5. Brochures** (if available at time of application)
- a. Have brochures been developed to help the public become familiar with the following?
- Purpose and philosophy of the school.
  - Educational services provided.
  - School operation.
  - Expected student department.
  - Student supplies, fees and costs.
  - School staff and governance.
  - Other information.
- 6. Charter School Name**
- a. Is the name of the school stated?
- 7. Philosophy, Vision, Purpose and Goals**
- a. What is the philosophy of the proposed charter school?
- b. Will the philosophy, vision and purpose of the school serve as reliable guidelines for decision-making?
- c. Are the goals stated in measurable terms?
- d. How will student learning outcomes improve?
- e. How do the goals of the school relate to Alberta's provincial programs of study (curriculum)?
- f. How do the goals of the school relate to the sections of the *Education Act* applicable to charter schools, including the preamble?
- g. How do the goals of the school relate to the goals set out by the Minister?
- 8. Educational Plan**
- a. What grade levels will be offered at the school?
- b. What educational need will the charter school fulfill?

- c. How will the charter school address this need?
- d. How is the educational service provided by the school enhanced, innovative or different from services already available in local schools?
- e. Is there a detailed description of the improved student learning outcomes to be attained by the students?
- f. Is there independent research to show the benefits of the educational plan?
- g. How will the school provide a continuum of supports and services to students that is consistent with the principles of inclusive education?

#### **9. Demographics of the Charter School**

- a. Does the charter provide a detailed description of the students who the charter school is intended to serve?
- b. What is the proposed student registration policy?
- c. What is the attendance area of the charter school?
- d. Are student selection criteria outlined in the event student enrolment exceeds the maximum capacity of the school?
- e. Are student selection criteria aligned with the charter? Are student selection criteria transparent and non-discriminatory?

#### **10. Governance**

- a. What is the name of the society or company that will operate the school?
- b. Do the by-laws describe the criteria that will be used for eligibility and selection of charter board directors?
- c. Are the relationships between the corporate body, the charter board of directors, school administration, teachers, students, parents and school council clearly outlined?
- d. Are the roles and responsibilities of each of these groups clearly outlined?
- e. Has an appeal process been established for each group in the event of a dispute over a decision?
- f. Do employment procedures clearly address employment contracts including salaries, benefits, termination, professional development, and grievance and appeals?
- g. Are the governance matters structured in policy (i.e. segregation of duties, financial controls, related party transactions and conflict of interest, etc.)?
- h. Do board and school policies align with responsibilities described in section 33 of the *Education Act*?
- i. Have evaluation policies been developed?

## 11. Contractual Arrangements

- a. Are there any contractual arrangements the charter board will or may be making? For example, have contracts been provided for:
  - staff employment;
  - facilities and resources;
  - student transportation;
  - custodial services, maintenance and repair;
  - personnel services such as superintendency, secretary-treasurer, administrative support, consultant; and
  - acquiring instructional resources.
- b. Has a policy been structured to guide the charter board when it enters into contracts and contract renewals?
- c. What financial provisions have been made in accordance with the *Charter Schools Regulation*, in case the charter school defaults on any of its contracts and the charter board is left with outstanding financial obligations?

## 12. Additional Revenue

- a. Is there a description of all revenues the charter board expects to receive in addition to provincial grants?
- b. Is there a designation for these funds? How will they be used?

## 13. Transportation

- a. What provisions, if any, has the charter school made for student transportation?

## 14. Amending the Charter

- a. Is there a description of matters that may initiate the amending process?
- b. What role do various stakeholders have in the amending process?
- c. Is a timeline for decision-making included in the process?

## 15. Dissolution Process

- a. Does the charter outline the charter school's dissolution process?
- b. In case the dissolution process is initiated by the charter board, does the charter provide sufficient advance notice of intent so that parents and students are able to make the adjustment with minimal disruption to student education?
- c. Does the charter require that a public meeting be held in advance of the dissolution process to inform the community of the charter board's intentions?
- d. Is there a detailed plan for the disposition of property and finances?

- e. Is there a plan for the transfer of students to other schools and for the disposition of student records?

#### **16. Term of Charter**

- a. Does the charter stipulate the date it comes into effect and the expiry date for the initial term?
- b. Does the charter outline the process and timelines for charter renewal?
- c. Has the charter board developed an annual school evaluation process to assist with charter renewal?

#### **17. Student Code of Conduct and Expectations**

- a. Is there a set of rules for discipline, attendance, suspension and expulsion? Do these align with sections 7, 8, 9, 31, 33(2), 33(3), 35.1, 36, 37 of the *Education Act*?
- b. Is there an outline of the dispute resolution process and the appeal process to be used under sections 41 and 42 of the *Education Act*?
- c. Has a handbook been developed that outlines student information and procedures, expectations of students, student conduct, matters of student discipline process and appeal procedures?
- d. Does the handbook specify all student fees, the purpose of these fees, and the resources that students are expected to provide?
- e. Are student extra-curricular activities outlined?

## Appendix B: Parent Declaration to Enrol Children in Proposed Charter School

Superseded

**PARENT DECLARATION**  
**TO ENROL CHILDREN IN PROPOSED CHARTER SCHOOL**  
*Charter Schools Regulation, AR 85/2019, Section 3(3)(h)*

The personal information collected on this form is collected pursuant to the provisions of the *Charter Schools Regulation, AR 85/2019* and will be used for the purposes of reviewing the preliminary charter school application as submitted by the applicants. This information will be treated in accordance with the ***Freedom of Information and Protection of Privacy Act, RSA 2000, Chapter F-25***. Should you have any questions about this collection, please contact Alberta Education, Field Services, 9th Floor, 44 Capital Boulevard, 10044 – 108 Street NW, Edmonton Alberta T5J 5E6. Telephone: 780-427-6273 in Edmonton (toll-free by first dialing 310-0000). Email: [EDC.FieldServices@gov.ab.ca](mailto:EDC.FieldServices@gov.ab.ca)

Each of the undersigned declares that:

1. he or she is the parent/guardian of the named child/children who is/are eligible to attend the proposed charter school on opening; and
2. he or she intends to enroll his or her child/children at the proposed charter school if it is approved by the Minister.

**Name of Proposed Charter School** \_\_\_\_\_

#	NAME of PARENT/GUARDIAN Please Print	TELEPHONE NUMBER	CHILDREN THAT WOULD ATTEND			SIGNATURE OF PARENT/GUARDIAN
			NAME(s)	AGE	GRADE	

**I/We, the applicant(s) wishing to establish the above charter school, certify that the above parents/guardians signed the declaration.**

\_\_\_\_\_  
 Charter School Applicant – Signature

\_\_\_\_\_  
 Name – Please Print

**Dated the** \_\_\_\_\_ **day of** \_\_\_\_\_, **20** \_\_\_\_\_

If required, continue on additional form.