

FUNDING MANUAL FOR SCHOOL AUTHORITIES 2013/2014 SCHOOL YEAR

FOR SCHOOL JURISDICTIONS, ACCREDITED FUNDED PRIVATE SCHOOLS AND
PRIVATE ECS OPERATORS WITH STUDENTS/CHILDREN IN ECS TO GRADE 12



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For further information, contact:

Alberta Education
School Finance Branch
8th Floor Commerce Place
10155 102 Street NW
Edmonton, Alberta T5J 4L5
Telephone: 780-427-2055 in Edmonton or toll-free in Alberta by dialing 310-0000
Fax: 780-427-2147

The primary audience for this resource is:

Teachers	
Central Office Administrators	✓
School Administrators	✓
Parents	
General Public	
Students	



This resource is available on the Alberta Education Web site at <http://www.education.alberta.ca/admin/funding/manual.aspx>

Note: Several Web sites are listed in this resource. These sites are listed as a service only to identify potentially useful resources. All Web site addresses were accurate at the time of publication but are subject to change. The responsibility to evaluate these sites rests with the user.

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FUNDING MANUAL FOR SCHOOL AUTHORITIES 2013/2014 SCHOOL YEAR

This manual is issued under authority of the following:

- *School Act*, RSA 2000, Chapter S-3, section 176
- *Alberta School Foundation Fund Regulation* (AR 250/1996)
- *Government Organization Act*, RSA 2000, Chapter G-10, section 13
- *Education Grants Regulation* (AR120/2008), section 2

(Original Signed)

Acting Deputy Minister of Education

March 7, 2013

Date

March 7, 2013

Message from the Deputy Minister

I am pleased to provide you with Alberta Education's *Funding Manual for School Authorities* for the 2013/2014 school year.

The *Manual* will assist school jurisdictions, charter schools, accredited funded private schools and private ECS operators in accessing and understanding Alberta Education funding. The *Manual* provides details on the funding available for the 2013/2014 school year including applicable formulas, funding rates, criteria and reporting requirements. Funding from Alberta Education supports the provision of approved education programs for students and children in ECS to Grade 12.

The Summary of Significant Changes on page 3 highlights important changes for 2013/2014. Any questions may be directed to the appropriate contact listed in section 9.2.

Please accept my best wishes for a successful school year.

Sincerely,

(Original Signed)

Acting Deputy Minister

SUMMARY OF SIGNIFICANT CHANGES

FUNDING MANUAL FOR SCHOOL AUTHORITIES

2013/2014 SCHOOL YEAR

The following are the significant content changes that have been made to the *2013/2014 Funding Manual for School Authorities*. Some of these changes may not apply to all school authority types. These changes are indicated throughout the manual with the words “Revised” or “New” in the left side margin of the page.

- **Funding Allocation Changes**
 - **School jurisdictions:** Class Size and Inclusive Education funding receive a 2% rate increase. All other funding rates remain the same as in 2012/2013.
 - **Accredited funded private schools:** all funding rates remain the same as in 2012/2013 except for Alberta Initiative for School Improvement funding which is suspended and Plant Operations and Maintenance funding which is discontinued.
 - **Private ECS operators:** all funding rates remain the same as in 2012/2013 except for Equity of Opportunity and ECS Administration funding, which have decreased and AISI funding which is suspended.
 - Alberta Initiative for School Improvement (AISI) funding is suspended effective April 1, 2013 (all school authorities).
 - The following funding allocations have been discontinued:
 - Fuel Price Contingency: effective April 1, 2013 (school jurisdictions)
 - Learning Resources Credit Allocation: effective September 1, 2013 (school jurisdictions and accredited funded private schools)
 - Plant Operations and Maintenance: effective September 1, 2013 (accredited funded private schools).
 - With the exception of the Alberta Initiative for School Improvement and Fuel Price Contingency grants, all other grant rates will be maintained for the remainder of the 2012/2013 school year.
- **Other Changes**
 - **Introduction: Limitations**
 - The maximum expenditure for system administration and school board governance is reduced by 10% from a range of 4-6% to a range of 3.6 to 5.4%. The difference between the previous maximum and the reduced maximum (0.4 % to 0.6%) will be deducted by Alberta Education on a monthly basis.
 - Funding for ECS administration is reduced from 6% to 5.4% of total ECS funding.
 - **Section 1.2: Base Instruction**
 - The Access Copyright fee no longer applies to Alberta school authorities as per the recent federal decision. Therefore this fee has been removed from this section and will no longer be deducted from Base Instruction funding.
 - The 10% reduction for System Administration and Board governance expenditures and the corresponding deduction by Alberta Education is explained.

- **Section 1.6 and 1.7: English as a Second Language and Francisation**

The maximum years funded for eligible students, decreases from 7 years to 5 years.

- **Section 1.10 Inclusive Education:**

- This section has been reformatted to improve clarity. The Supports and Services component is now expressed as \$457.34 per student.
- Charter Schools will continue to receive the Additional Per student allocation of \$56.10.
- Transition funding, implemented in Budget 2012 with the new Inclusive Education grant, will be renamed Program Equity and will be in place over the period of the 2013-2016 Business Plan.

- **Section 1.12 Small Schools by Necessity (SSBN):**

Metro school jurisdictions are no longer eligible for this funding.

- **Section 1.14: Equity of Opportunity**

This section has been restructured to adjust the funding provided through the three components.

- **Section 1.17 Plant Operations and Maintenance (POM)**

FTE Funded enrolment replaces FTE weighted enrolment in the POM formula. Metro school jurisdictions are no longer eligible for the SSBN component of this funding.

- **Section 5.1 Regional Collaborative Service Delivery (RCSD)**

- Regional Collaborative Service Delivery (RCSD) is intended to provide a regional model for support to schools and community partners to meet the needs of children and youth (ECS to Grade 12), as well as to families who have children and youth with complex needs (birth to 20). It is also intended to strengthen the capacity of service providers to collaboratively respond to those needs.
- Funding for the model will come from blending the funding previously used for Student Health and Children and Youth with Complex Needs – which will be discontinued.

- **Section 9.1 CEU Funding Tiers**

- Tier 4 has been added to the CEU Funding Tiers Table to indicate the CEU funding rate for Work Experience and Special Projects courses will be \$112.48 per CEU.
- School authorities with students taking ADLC courses, will be funded at 44% of the respective CEU Tier rate.

- **Glossary of Terms**

- The definition of Refugee: has been revised to provide further clarity. Inclusive Education funding will be provided for a maximum of 5 years per refugee student.

Any questions regarding these changes may be directed to Daimen Tan, Leona Badke or Mark Lalumiere of the School Finance Branch at 780-427-2055.

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FOREWORD

*Funding for ECS-12 education is based on the principles of equity, flexibility and accountability. The allocations identified in this Manual represent a mechanism that equitably distributes provincial funding to support the education of all Alberta children and students from Early Childhood Services (ECS) to Grade 12. Unless otherwise specified, **school authorities** have maximum flexibility in determining how these funds are used to best meet local needs. School authorities are accountable for their use of funds and results achieved. The information in the manual is not intended as a substitute for provincial legislation or other policy, standards or regulations.*

GENERAL CONDITIONS

General terms and conditions related to funding are listed below. The Manual user should become familiar with these and ensure that they are met.

1. Unless otherwise specified, funding is for the current **school year** based on the funding rates and payment schedules found in Part 8.
2. The **Minister** may determine the funding amount and the method by which that amount is determined. This determination may include a reduction in funding where a strike or lockout leads to cessation of services by teachers or other employees of a **school authority**.
3. Funding is provided to **school authorities** with the expectation that the **school authority** will offer the necessary programs or services to meet the needs of all **funded children/students**. It is also expected that **school authorities** will comply with all relevant government legislation, policy, regulations, and standards when applying for funding. **School authorities** are accountable to meet the education needs of all their students and children, for the results achieved and for the use of resources. **Boards** who have entered into an **education services agreement** (under section 62 of the *School Act*) remain responsible for the educational program of their **resident student** to whom the agreement applies as per section 45 of the *School Act*.
4. **School authorities** are expected to:
 - a) Meet the conditions and requirements outlined in this Manual. Failure to do so may result in a reduction or denial of funding; and
 - b) Meet the requirements set out in or adopted pursuant to sections 39(1) and 47 of the *School Act*; by
 - i. Ensuring that only those courses of study or education programs prescribed or authorized by the **Minister** are followed;
 - ii. Ensuring that the minimum total hours of instruction are made available to a child or student in a **school year**;
 - iii. Ensuring that only those instructional materials authorized or approved by the **Minister** are used in **schools** (or by the **school board** for locally developed courses);
 - iv. Ensuring that, subject to the right of a **board** to provide religious instruction, a course, an education program, or instructional material that has been prohibited by order of the **Minister**, are not used in **schools**;
 - v. Ensuring that goals and standards applicable to the provision of basic education are met; and
 - vi. Providing special education programming for students with special education needs.
 - c) Meet the applicable requirements of the *Government Accountability Act* and the *Financial Administration Act*.

5. The reference documents listed in Section 9.3 of this Manual should be used by **school authorities** as companion documents to the *Funding Manual for School Authorities*. They should not be used exclusive of each other.
6. **School authorities** applying for funding shall keep on file, for seven years, the documents required to support their claim for each type of funding described in this Manual, including invoices. The following are examples of other information to be kept on file:
 - a) An eligible enrolment count as of the **September count date** for the **school year**;
 - b) Copies of current **education service agreements** including **transportation agreements**;
 - c) A record of the daily attendance of each enrolled student including high school students, the master timetable and student timetables and documents listed in Section 1.2;
 - d) A list of **schools**, teachers and administrators involved in each program;
 - e) Documentation supporting a student's eligibility as a **funded student/funded child**;
 - f) Where applicable, documentation supporting a student's eligibility for funding as a child of a **temporary resident**.
7. Alberta Education reserves the right to request and inspect documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. This document inspection may be conducted off-site or on-site in a **school authority**.
8. An adjustment may be made to a payment when a review or audit by Alberta Education indicates that:
 - a) A **school authority** has received funding to which it was not entitled (pursuant to Section 9(1) of the *Education Grants Regulation*) – Note: no limitation period; or
 - b) A **school authority** has not received funding to which it is entitled – Note: the limitation period for school authorities to request an adjustment/change to any funding, shall be three years including the current **school year**.
9. Payments may be withheld from **school authorities** if the Audited Financial Statements or the Budget Report have not been properly completed in accordance with the respective guidelines and submitted by the due date. This also applies to the **School Board Three-Year Education Plan** or the **Annual Education Results Report (AERR)**; or any other information required by the **Minister**. When the documents have been submitted and are determined to be acceptable, payments will then be released.
10. **ECS operators** who have received funding from Alberta Education to provide an **ECS program** and have decided to cease operations may be required to return a portion of their accumulated operating surplus to the Government of Alberta (see Section 9.4).
11. Pursuant to the *Education Grants Regulation* and the *Government Organization Act*, and in addition to the funding provisions in this manual, the **Minister** may provide funding to a **school authority**, or any other person, or organization for purposes related to the education of Alberta students and children.
12. **Accumulated Deficit from Operations (ADO):**
 - a) A budgeted **annual operating deficit** is acceptable if sufficient accumulated surplus from operations (ASO) is available to cover the planned shortfall. If sufficient ASO is not available, then the **accumulated deficit from operations (ADO)** must be supported by a Ministry approved **ADO Elimination Plan** to be submitted with the Budget Report. A **school authority** submitting an **ADO Elimination Plan** will be expected to work with Alberta Education to achieve expected financial results.

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- b) November 30 is the deadline for **school authorities** to submit Audited Financial Statements (AFS) for the previous school year. A **school authority** submitting an AFS with an **accumulated deficit from operations (ADO)** will be expected to work with Alberta Education to eliminate the **ADO** within three to five years in accordance with a Ministry approved **ADO** Elimination Plan.
- c) A **school authority** may be subject to an inquiry under section 41 of the *School Act*. A **school jurisdiction** may be subject to the appointment of an official trustee under section 42 of the *School Act* to conduct the affairs of the **school jurisdiction**.

LIMITATIONS

School authorities have maximum flexibility to use the funds allocated by Alberta Education to best meet local needs, however the following limitations will apply:

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1. The maximum expenditure for system administration and **school board** governance will range from 3.6% to 5.4% depending on the student enrolment of the **school jurisdiction**. To determine the maximum expenditure, the applicable percentage is applied to a **school jurisdiction's** total expenditures as outlined in the Guidelines published by the Financial Reporting and Accountability Branch. See section 1.2, Fees and Deductions on how this reduction will be deducted from **school board** payments.
2. Funding provided to support ECS to Grade 12 programs cannot be used to support courses, programs or training for adults (20 years and older).
3. Targeted Funding for Provincial Initiatives is allocated for specific priority programs as determined by Alberta Education, and are included in Part 5 of this Manual.
4. Funding for capital needs is allocated to **school jurisdictions** based on priorities and formulas determined by Alberta Education. Funding is provided for the areas of School Facilities and Infrastructure Maintenance and Renewal. Funding for these areas cannot be used for purposes other than capital needs.
5. Given the nature of the following funding areas, it is not possible to utilize the funding for purposes other than that for which it was provided: Francophone Education Funding, French Language Funding, Education Programs in an **Institution** Funding, Regional Educational Consulting Services Funding, Program Unit Funding, Learning Resources Credit Allocation, Regional Consortium Funding, and Debt Retirement.

ALLOCATION CATEGORIES

Funding allocations are distributed in five categories: Base Instruction Funding, Additional Funding for Differential Cost Factors, Targeted Funding for Provincial Initiatives, Other Provincial Support, and Capital Funding.

1. Base Instruction Funding
 - Is provided on a per student basis for every full-time equivalent (**FTE**) student from Early Childhood Services (ECS) to Grade 9. For students in Grades 10 – 12, Base Instruction funding is provided based on Credit Enrolment Units (**CEUs**).
 - Class Size funding is a component of Base Instruction and is provided for every student from Early Childhood Services (ECS) to Grade 3.
2. Additional Funding for Differential Factors
 - a) Is based on distribution formulas designed to address variable cost factors.
 - b) Specific identified student populations include:
 - i. Early Childhood Services **children with mild/moderate disabilities**, those with severe disabilities/delays and those who are gifted and talented;
 - ii. English as a Second Language/**Francisation** children/students;

- iii. First Nations, Métis, and Inuit children/students;
- iv. The percentage of the student population of a **school jurisdiction** experiencing low Socio-Economic Status (SES).
- c) SES is calculated on the general student population of the **school jurisdiction** and an incidence rate relative to the **school jurisdiction**. It is derived from census data provided by Statistics Canada.
- d) The allocation formulas are designed to address variable cost factors, such as:
 - i. Small schools by necessity;
 - ii. Year to year enrolment fluctuations;
 - iii. Administration costs for **school jurisdictions** with small enrolments;
 - iv. Increased costs for **schools** located in the north;
 - v. Variable cost of transporting students in rural, urban and metro **school jurisdictions**;
 - vi. Support for Hutterite colony schools;
 - vii. Support for francophone students to have equivalent access to programs.
- 3. Targeted Funding for Provincial Initiatives
 - Must be used for the purpose it was allocated, this includes funding for Regional Collaborative Services Delivery, and SuperNet Service.
- 4. Other Provincial Support
 - Is provided in addition to the funding identified above and covers such areas as Regional Educational Consulting Services, Institutional Programs, Regional Consortium, Debt Retirement and the Fort McMurray Allowance.
- 5. Capital Funding
 - Is provided for modernization of an existing school facility, or construction of a new school facility. This funding may only be used for the purpose it was intended.

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REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

The government provides **school jurisdictions** with their funding allocation from either or both of the following sources of revenue:

1. The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per **ASFF eligible student**:
 - a) For the purpose of the ASFF, the term "**school boards**" does not include **Francophone Regional Authorities, charter schools, accredited funded private schools** or **private ECS operators**.
 - b) The equal amount per **ASFF eligible student** from the ASFF is calculated by dividing the total requisition revenue collected by the province and opted out separate **school boards** by the total number of **ASFF eligible students**. All **school boards** will receive this dollar amount per **ASFF eligible student**.

When a separate **school board** has opted out of the ASFF and the local requisition per student is less than the ASFF payment per **ASFF eligible student**, the difference will be paid from the ASFF. If the local requisition is more than the ASFF payment per **ASFF eligible student**, the difference must be paid into the ASFF. For an opted out separate **school board**, the sum of the ASFF payment provided by the province and the tax revenue collected from the **school board's** declared taxpayers equals the ASFF payment the separate **school board** would otherwise receive if that **school board** participated fully in the ASFF.

2. The General Revenue Fund (GRF) provides grants authorized by the **Minister**.
 - a) In a **school year**, a **school jurisdiction** will receive funding from the GRF of the province equal to its funding allocation less the payments it receives from the ASFF (if applicable). For example, a public **school jurisdiction** entitled to a funding allocation of \$30 million and receiving \$10 million in ASFF, payments would be eligible for \$20 million from the GRF.
 - b) GRF provides funding for **accredited funded private schools** and **private ECS operators**.

Payment from ASFF

A funding allocation is calculated in the same way for public and separate **school boards** participating in the ASFF and separate **school boards** that have opted out of the ASFF.

School boards will receive a payment from the ASFF equal to their number of **ASFF eligible students** multiplied by the amount per **ASFF eligible student**. The difference between a **school board's** funding allocation and payment from the ASFF is provided by a grant from the GRF of the province.

Separate **school boards** that have opted out of the ASFF receive local education property tax requisitions quarterly from their declared taxpayers. Alberta Education provides a monthly advance on the local education property tax requisition that is repaid by the opted out **board** by the last banking day of each of the months of March, June, September and December. Opted out separate **school boards** whose local requisition per **ASFF eligible student** is less than the provincial payment per **ASFF eligible student** will also receive a payment from the ASFF that, when combined with their local education property tax requisition, would be the same amount they would receive if participating in the ASFF. The balance of the funding allocation for an opted out separate **school board** is provided by a grant from the GRF of the province.

MANUAL FORMAT

A list of major changes is provided in the accompanying document: *Summary of Significant Changes*.

Parts 1 to 7 of the Manual describe the funding that is available to **school authorities** with the following format:

ALLOCATION FORMULA: describes the specific formula used to calculate the amount of funds that will be allocated to **school authorities**.

ALLOCATION CRITERIA: describes the criteria that must be met to qualify for the funding identified in each section.

Part 8: Payments to School Authorities

This section identifies funding rates and payment schedules.

Part 9: Additional Information, Reporting Requirements

The following information is included in this section:

1. Information and Reporting Requirements
2. Contact List
3. References
4. Ceasing of Operations by a **Private ECS Operator**
5. *Government Organization Act*
6. Withdrawal of Teacher Services or Lockout

Forms

All forms required to access funding are provided in this section.

Glossary of Terms

The Glossary of Terms outlines the definitions of terms used in the Manual. Each term is printed in **bold face type** throughout the Manual and has a specific meaning for funding purposes.

Part I — Funding for School Jurisdictions, Francophone Regional Authorities, and Charter Schools

BASE INSTRUCTION FUNDING

Section 1.1 — Early Childhood Services (ECS) Base Instruction Funding

ALLOCATION FORMULA

$$\text{ECS Funding Allocation} = \text{\# of funded children} \times (\text{ECS Base Instruction Rate} + \text{ECS Class Size Rate}^*)$$

*Note: **accredited funded private schools, private ECS operators, and Hutterite Colony Schools** are not eligible for ECS Class Size Funding.

ALLOCATION CRITERIA

1. Access to at least 475 hours of ECS instruction must be provided. Modifications to this requirement may be made for **children with special education needs** based on their **IPP** and based on age.
2. A child referred to in section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, an approved **ECS operator** must be prepared to accept and organize programming for all **funded children** for whom programming is requested, including **children with special needs**.
3. A **funded child** can only be claimed for funding by one **ECS operator** per year.
4. **ECS operators** are eligible for one year of ECS Base Instruction Funding for regular ECS **funded children**, who are at least 4 years 6 months of age and less than 6 years of age on September 1.
5. **ECS operators** may only charge a fee to **parents of funded children** in a basic 475-hour program to offset non-instructional costs such as supplies, snacks and field trips.
6. **ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional instructional hours.
7. An individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is coded as mild/moderate or severe, may be counted as a **funded child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the parent agree that an **ECS program** is the most appropriate placement, and the child has spent less than the number of years in the program for which they are eligible.
8. An individual who is at least 6 years old but less than 7 years old on September 1 may be counted as a **funded child** (rather than a **funded student**) if they are enrolled in an **ECS program** and are either **developmentally immature** or are entering an **ECS Program** for the first time. Any other situations involving registering an over age child require special approval by the School Finance Branch.

9. **Children with mild/moderate disabilities/delays** or children who are gifted and talented and who are between the ages of 3 years 6 months but less than 4 years 6 months old on September 1, that are enrolled and identified after the September count date and are reported on the March Count, will be eligible for 50 per cent ECS Mild/Moderate or Gifted and Talented Funding and 50 per cent ECS Base Instruction Funding.
10. When a **funded child** (not a **child with special education needs**) lives in a remote area and there is no ECS program offered in a **school** within a reasonable transportation **distance**, the **school jurisdiction** may provide an **ECS home program**. A certificated teacher must plan, deliver and evaluate the program and the program must have at least twenty-two visits to the family home for a minimum of 1.5 hours each -considered equivalent to a basic 475-hour kindergarten program. The frequency, setting and structure of an **ECS home program** must be determined in consultation with **parents**. An **ECS home program** is not a home-education kindergarten program and it is not **family-oriented programming**.

REFERENCES

[Early Childhood Services Regulation](#)

[Guide to Education: ECS to Grade 12](#)

[Kindergarten Program Statement](#)

[ECS Fact Sheets](#)

See section 9.1 – Reporting Requirements and Information.

Section 1.2 — Grades 1 – 12 Base Instruction Funding

ALLOCATION FORMULA:

1. Grades 1 – 9

$$\text{\# of funded students in Grades 1 - 9} \times \left(\text{applicable grade level Base Instruction Rate} + \text{applicable grade level Class Size Rate}^* \right)$$

*Note: **accredited funded private schools**, and Hutterite Colony Schools are not eligible for Class Size Funding.

2. Grades 10 – 12

	a) # of Tier 1 CEUs for funded students	X	Tier 1 CEU Rate
	Plus,		
	b) # of Tier 2 CEUs for funded students	X	Tier 2 CEU Rate*
	Plus,		
	c) # of Tier 3 CEUs for funded students	X	Tier 3 CEU Rate*
	Plus,		
NEW	d) # of Tier 4 CEUs for funded students	X	Tier 4 CEU Rate
	Plus,		
	e) # of funded students coded 500, 550 or 640	X	High School Base Rate
	Plus,		
NEW	f) # of CEUs for ADLC courses	X	44% of the Tier CEU Rate
*Note: Tiers 2 and 3 include Class Size Funding, therefore, all accredited funded private school CEUs are funded at the Tier 1 rate. See sections 8.1, 8.3 and 9.1 for applicable funding rates.			

ALLOCATION CRITERIA

1. **School authorities** must provide students with access to:
 - a) up to 950 hours of instruction for Grade 1;
 - b) a minimum of 950 hours of instruction for Grades 2 to 9;
 - c) a minimum of 1000 hours of instruction for Grades 10 to 12; and
 - d) a minimum of 25 hours of instruction per high school credit timetabled for both the student and teacher in the same time period. (Exception 8 (b) this section).
2. All individuals who are at least 5 years, 6 months of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** and **funded child** in the Glossary of Terms.
3. Under no circumstances can an individual be counted as both a **funded student** and as a **funded child** in the same **school year**.
4. High school courses taken by Grade 9 students in a summer program, prior to the start of their Grade 10 Fall term will not be included in the calculation of the 60 **Credit Enrolment Unit (CEU)** annual limit for funding outlined in Allocation Criteria #8 of this section.
5. The Superintendent and Secretary-Treasurer of **school jurisdictions** are required to sign and submit to School Finance a **Declaration of Management** (form 13AE1.2c) on an annual basis.
6. Funding may be provided to the **resident school board** of a **funded student** who attends school in another **school authority** with which their **resident school board** has an **education services agreement**. The agreement must be submitted to the School Finance Branch by November 15 for review and funding approval.
7. A student may be funded for an academic program associated with an **activity program** offered outside of Alberta (but in Canada) if:
 - a) the student meets the criteria of a **funded student**;
 - b) the **activity program** is not offered in Alberta;
 - c) the student was selected by **audition** or another substantive selection method to be part of the program; and
 - d) a signed **education services agreement** has been submitted to School Finance Branch by November 15.
8. Criteria for funding for eligible students in Grades 10 to 12:
 - a) Funding is provided on a **CEU** basis for senior high school courses as follows:
 - i. Credit Value 1 = 1 **CEU**,
 - ii. Credit Value 3 = 2.5 **CEUs**,
 - iii. Credit Value 5 = 5 **CEUs**.

Funding is based on the **CEU** Funding Tiers listed in section 9.1, and on the rates listed in sections 8.1 and 8.3. Note: Tiers 2 and 3 **CEU** funding includes Class Size funding, and therefore only applies to **school jurisdictions** and not to **accredited funded private schools**.
 - b) Funding is provided for senior high school courses completed during weekends (Saturday and Sunday), statutory holidays, evenings (after 6:00 p.m.), and during the summer break, if instruction is provided for a minimum of:
 - i. 80 hours for a five credit course; or
 - ii. 48 hours for a three credit course.

(Registered Apprenticeship Program, Work Experience, and Special Projects courses are exceptions to these rules – see the *Guide to Education* for more details).
 - c) Funding is provided for a maximum of 60 **CEUs** per student per year (September to August). Any **CEUs** in excess of this maximum will be recovered at the Tier 1 **CEU** Rate. Note: students are not restricted in the number of credits they can take in a **school year**. For funding purposes such as block funding, 35 **CEUs** is considered to be a full-time program.

- d) Funding is provided for Alberta Distance Learning (ADL) courses paid by a **school authority** for students whose marks are reported by the Alberta Distance Learning Centre (ADLC).
- e) Funding is provided for off-campus education programs, and other credit courses involving substantial off-campus instruction (see *Guide to Education*).
- f) Knowledge and Employability (K&E) course credits completed and credits completed for any remaining Integrated Occupational (IO) courses will be funded at 8/5 times the Tier 1 **CEU** rate.
- g) **ESL funded students** registered on the **September count date** who are coded as 301 or 303 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 Tier 1 **CEUs** per student per semester of ESL courses taken. These students are also eligible for ESL Funding (section 1.6). No additional funding is provided for other courses completed during these semesters. Also:
 - i. If an **ESL funded student** (as described above) is not enrolled in at least one ESL course, they will be funded on a CEU basis for the non-ESL courses taken.
 - ii. **ESL funded students** (as described above) who are enrolled in an outreach or on-line program will not be funded at the rate of 17.5 Tier 1 CEUs. These students will be funded on a CEU basis.
 - iii. ESL students taking courses during the summer **term** will be funded on a **CEU** basis.
- h) Funding is provided for credits granted through **challenge assessments** at 20 per cent of the **CEU** value for the course(s) challenged. Funding will not be provided for challenge assessments and course completion for the same subject in the same semester.
- i) **High School Base rate** funding is provided for:
 - i. **students with special needs** (code 500)
 - ii. students in an **Institution** (code 550)
 - iii. students on a one year **reciprocal exchange program**.
- j) **High School Base rate** funding is provided for high school **refugee students** (code 640) who have documents on file from Citizenship and Immigration Canada substantiating their Refugee application. See definition of a **refugee student**.
 High school **refugee students** enrolled in Home Education Programs, **Blended Programs**, **Outreach Programs** or **On-Line Programs** are not eligible for **high school base rate** funding.
- k) When a student transfers from one high school to a high school in another **school authority** during a **term** in which a course is offered, the **school authority** that provided the majority of instructional minutes will receive the funding from Alberta Education.
- l) Funding is provided for Alberta **funded students** enrolled with a Lloydminster school **division** high school on the **September count date**.
- m) Funding is provided for senior high school students who take a junior high course for 125 hours; the equivalent of 5 **CEUs** will be funded for each course completed (Form 13AE1.2a).
- n) Additional funding will be provided for credits completed in the summer for high school students identified with the 500 or 600 grants code.
- o) Funding is provided for locally developed senior high school credit courses where instruction is provided and if the **school jurisdiction** is authorized to deliver the course.
- p) High school courses taken by junior high students will not be funded unless they are taken in the summer semester prior to entering Grade 10.
- q) Funding is not provided for waived or retroactive credits for high school courses.
- r) Approved heritage language **accredited funded private schools** are eligible to receive **CEU** funding for high school language courses, however they are not eligible for any other funding provided by Alberta Education to **accredited funded private schools**.

9. Criteria for funding high school courses:

- a) High school courses delivered to students and claimed for funding must meet the conditions in this Funding Manual, *The Guide to Education: ECS to Grade 12* and all other Alberta Education legislation, regulations and policies.
- b) A regular course (non-Career Technology Studies) submitted as complete (COM) or withdrawn (WDR) is considered completed for funding purposes when:
 - i. a student has earned a final mark of 50 per cent or greater in the course; or
 - ii. a student has earned a final mark of 25 per cent or greater but less than 50 per cent in the course, and has attended at least 50 per cent of the classes in the course or has worked on and been assessed on at least 50 per cent of the course content. When a student changes from one course to another within an academic program in the same **term** (e.g. student switches from Social Studies 10 to Social Studies 13), **school authorities** shall only claim one course for funding.
 - iii. For diploma examination courses (i) and (ii) only applies to the school-awarded portion of the mark.
- c) One credit Career Technology Studies (CTS) course submitted as COM, incomplete (INC) or WDR is considered completed for funding purposes when a student has worked on and been assessed on at least 50 per cent of the course content.
- d) Funding is provided for repeated courses if the funding criteria in this section are met.
- e) Funding will not be provided for a CTS course if the prerequisite(s) was not completed and /or waived in the same term or a prior term.
- f) For regular courses submitted as COM or WDR and delivered to students on-line or by distance learning the attendance funding criteria may not apply (refer to 9b).
- g) For all regular and CTS courses, **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, and final marks. Attendance records must also be maintained for non CTS courses.

10. Course Completion Status Codes:

All course submissions for funding require a course completion status code. The following describes the status codes:

- a) A COM status should be used when a student finishes a regular course or when a student successfully completes a CTS course. A course completion status of COM may be used for all courses.
- b) A WDR status should be used when a student chooses not to complete a course and the **school** agrees to remove the student from the course. When a completion status of WDR is used, the course will not appear on a student's transcript. A course completion status of WDR may be used for all courses.
- c) An INC status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Programs of Study. An incomplete status has no associated mark(s).

11. CEU Funding Recovery Schedule:

- a) A 10 per cent funding recovery will be applied for violations to requirement of access to a minimum number of instructional hours as follows:
 - i. courses where access to instruction is found to be less than 25 hours per high school credit or 20.8 hours per credit for a 3 credit course;
 - ii. when a school timetables several high school courses in the same block and the access to instruction for courses offered is found to be less than 25 hours per credit;
 - iii. courses/classes with unreasonably high enrolments where it is determined that it is not reasonable or even possible for a large number of students to have access to 25 hours of instruction per credit; and

- iv. where a high school student does not have access to at least 1000 hours of instruction.
- b) A 100 per cent funding recovery will be applied when:
 - i. courses taught did not follow the *Programs of Study*.
 - ii. a school that has been assessed a penalty previously, continues to be non-compliant.
 - iii. courses have both access to instruction and *Programs of Study* contraventions.
- c) A 75 per cent funding recovery will be applied when Special Projects do not meet the programming requirements set out in the *Guide to Education: ECS to Grade 12*.

FEES AND DEDUCTIONS

1. *EduLink*:

EduLink, a multi-function data exchange software tool has been created to help simplify current data management and exchange processes.

Alberta Education will deduct approximately 41¢ plus GST per **funded student** and **funded child** on behalf of all participating **school authorities**. This deduction will be made in September or October and based on the prior year **frozen funded head count student** and **funded child** count. The deduction will be reflected on the September or October funding statement. It is up to the individual **school authorities** to apply for any GST rebate from the Government of Canada.

Alberta Education will forward the maintenance fee of \$240,000 to Edmonton Catholic Schools, the host **board**. This funding provides for the annual maintenance budget but does not address the cost of any significant changes to the software.

2. *Alberta School Boards Association (ASBA)*:

The Alberta School Boards Association (ASBA) has asked Alberta Education to deduct the ASBA membership fees plus GST from the instruction funding for most **school jurisdictions**. These deductions will be reflected on the October and April funding statements. The deduction is calculated by multiplying a weighted student count times a fee per student (set annually by the ASBA), plus a \$6,500 basic fee charged to each **school board**.

If a **school board** wishes to be billed directly by the ASBA for membership fees (rather than continue the automatic deduction by Alberta Education), they should submit a written request to the ASBA before the start of the **school year** and send a copy to the Director of the School Finance Branch, Alberta Education.

NEW

3. Deduction for System Administration and Board Governance

Alberta Education will be processing a deduction from **school jurisdictions** payments equivalent to 10 per cent of boards' allowable administration maximum. The deduction will be calculated based on total expenditures in the 2011/2012 audited financial statements. For the 2013/2014 school year, the total deduction will be recovered from the monthly payments for September 2013 to March 2014.

REFERENCES

[Guide to Education — ECS to Grade 12](#)

See Part 9, section 9.1 – Reporting Requirements and Information, of this Manual.

Section 1.3 — Home Education Funding

ALLOCATION FORMULA

1. Home Education

Home Education Allocation	=	# of Home Education Students Grades 1 to 12	X	Home Education Rate
PLUS				
a) For Grades 7 to 12 50% of ADL course costs to a maximum equivalent of Home Education Rate.				
b) For Grades 1 to 6 The ADL course cost that exceed the 50% of the Home Education Rate that the associate board or associate accredited funded private school provides to the home education parents.				

2. Blended Program Grades 1 to 9

Blended Program Allocation for each funded student	=	(% of the Home Education Program X Home Education Rate)
PLUS		
The % of school program (min. 50%)	X	(Applicable grade level Base Instruction Rate + Applicable grade level Class Size Rate)
PLUS		
The ADL course cost that exceeds 50% of the Home Education rate the associate board or associate accredited funded private school provides to the home education parents (Up to a maximum of the student's pro-rated Home Education Funding amount).		

3. Blended Program Grades 10 to 12

Blended Program Allocation for each funded student	=	(% of Home Education Program X Home Education Rate)
PLUS the lesser of:		
a)	The % of the school program (min. 20 %)	X High School Base Rate
or		
b)	CEUs completed	X The Tier 1 CEU rate
PLUS 50% of the eligible ADL course costs up to a maximum of the student's pro-rated Home Education Funding amount.		

ALLOCATION CRITERIA

1. The education programs for these students must be consistent with the student learning outcomes described in the *Alberta Programs of Study* or stated in the schedule attached to the *Home Education Regulation*, and be supervised by an **associate board** or **associate accredited funded private school**.
2. An **associate board** or **associate accredited funded private school** must offer to the **parents** of a **home education student** not less than 50 per cent of the Home Education funding for the purchase of instructional materials.
3. For a **home education student** enrolled by the **associate board** or **associate accredited funded private school** in ADL courses at the ADLC at the **parents'** direction, the **school board** may use some or all of the **parent's** 50 per cent funding to pay for the cost of these courses and required instructional materials. The **associate board** or **associate accredited funded private school** may claim costs for ADL courses that exceed the **parent's** 50 per cent funding.
4. For **home education students** in Grades 7 to 12 enrolled by the **associate board** or **associate accredited funded private school** in ADL courses at the ADLC, the funding provides for 50 per cent of the cost of printed ADLC course costs to a maximum equivalent of the Home Education Instructional Funding amount. This funding may be claimed on Form 13AE1.3a.
5. When a **home education student** in Grades 7 to 12, who is taking ADL courses through the ADLC, moves from one **associate board** or **associate accredited funded private school** to another after the **September count date**, and the receiving **associate board** or **associate accredited funded private school** also enrolls the student in ADL courses through the ADLC; Alberta Education will pay 50 per cent of the eligible ADL course costs combined for both **associate boards**, up to a maximum equivalent to the Home Education funding amount.
6. **Home education students** and their **parents** must reside in Alberta on the **September count date** of the current **school year**.
7. **Home education students** in **accredited funded private schools** are not eligible for Severe Disabilities Funding.

REFERENCES

[Home Education Regulation](#)

[Home Education Regulation Notification Form](#)

See Part 9, section 9.1 – Reporting Requirements and Information, of this Manual.

ADDITIONAL ALLOCATIONS FOR DIFFERENTIAL COST FACTORS

Section 1.4 — Outreach Funding

ALLOCATION FORMULA

Outreach Allocation	=	# of approved Outreach Programs in the school jurisdiction	X	Outreach Funding Rate
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ALLOCATION CRITERIA

1. Outreach Funding is subject to Alberta Education's approval of the **Outreach Program** by Zone Services Branch by March 31 of the prior year.
2. Students taking courses in an **Outreach Program** are funded under section 1.2, Base Instruction Funding, of this Manual. **Students with special education needs** enrolled in an **Outreach Program** can be coded 500 and receive the **High School Base Rate** funding.
3. Students in an **Outreach Program** may also complete courses in other programs or **schools**.
4. The *Outreach Programs Handbook* provides assistance in developing an outreach application.
5. The Application to Operate a New Outreach Program can be found in the *Outreach Programs Handbook*.

REFERENCES

[Alberta Education Programs of Study Guide to Education](#)
[Outreach Programs Handbook](#)

See also Part 9, section 9.1 – Reporting Requirements and Information, in this Manual.

Section 1.5 — ECS Program Unit Funding (PUF)

ALLOCATION FORMULA

1. The funding amount paid will be the lesser of:
 - a) the approved budget amount;
 - b) the program unit ceiling amount; or
 - c) the actual costs.

2. a) Calculation of the ceiling amount for a program unit with one PUF child:

- i. Centre-Based Programming;

Ceiling Amount	=	$\frac{\text{\# of centre hours (max. 800)}}{800 \text{ hours}}$	X	Rate for one program unit funded child
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- ii. Combined Program: Centre-Based And **Family-Oriented Programming Sessions**.

Ceiling Amount	=	$\left(\frac{\text{\# of centre hours (max. 800)}}{800 \text{ hours}} + \frac{\text{\# of sessions (min. 4, max 36)}}{36 \text{ sessions}} \right)$	X	Rate for one program unit funded child
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- b) Calculation of the ceiling amount for a program unit with more than one program unit funded child (**clustering**).

Choose the program unit funded child with the highest combination of centre-based programming hours and/or **family-oriented programming** sessions and calculate the ceiling amount using the previous formula 2 a) (i) or (ii), whichever is applicable.

PLUS: for each additional PUF child in the unit, the ceiling calculation is:

$\left(\frac{\text{\# of centre hours (max 800)}}{800 \text{ hours}} + \frac{\text{\# of sessions (min 4, max 36)}}{36 \text{ sessions}} \right)$	X	Rate for each additional PUF child in a unit
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- c) calculation of the ceiling amount when a child's program starts after September 30 or ends before May 25 will be the lesser of the following ceiling calculations:
- a pro-rated ceiling based on the number of months of the child's PUF program multiplied times \$2,505 per month; or
 - the ceiling calculation as shown in 2 a) (i) or (ii) – whichever is applicable.
- d) Maximum funding for a program unit child is based on 800 hours of centre-based programming or 36 **family-oriented programming** sessions or combination thereof.

ALLOCATION CRITERIA

- PUF may be paid to a **school authority** for each eligible **child with a severe disability/delay** for a maximum of three years.
- To be eligible for funding, a **child with a severe disability/delay** must be at least 2 years 6 months of age and less than 6 years of age on September 1.
- School authorities** will use the *Special Education Coding Criteria* to determine the child's eligibility and proper coding.
- Assessment information must be sent to the Early Learning Branch for pre-approval of each child's eligibility prior to submission of a PUF application.
- Payment is based on approval of a PUF application. Each **school authority** is only allowed to submit one PUF application that lists all children who are eligible for PUF.
- Only one **school authority** will be funded for a PUF eligible child for the same time period. When a PUF child moves from one **school authority** to another one, the first school authority must revise the child's program end date on the PUF application and the second **school authority** must submit a PUF application for the time the child is with them.

7. A **child with a severe disability/delay** who:
 - a) is at least 5 years 6 months but less than 6 years of age on September 1 of the school year in which he/she is counted; and
 - b) is eligible to enter Grade 1 under the **school** entrance age policy of the **school jurisdiction**; and
 - c) has not spent 3 years in an **ECS program**, may be eligible for PUF if, in the opinion of the school authority and the parent, an **ECS program** is the most appropriate placement for the PUF child.
8. **Designated Special Education ECS Programs** must comply with all Allocation Criteria outlined in this section. Also, Alberta Education will apply all applicable revenues to the total program costs (such as ECS Base Instruction Funding, Mild/Moderate Funding, ECS Transportation Funding and other applicable revenues) to determine a net program cost total to which the PUF will apply.
9. A **funded child** receiving PUF is not eligible for ECS Mild/Moderate Funding.

REFERENCES

[ECS Fact Sheets](#)

[Special Education Coding Criteria](#)

[Guide to Education](#)

[Standards for the Provision of Early Childhood Special Education](#)

See Part 9, section 9.1 – Reporting Requirements and Information, of this Manual

Section 1.6 - English as a Second Language (ESL)

ALLOCATION FORMULA

ESL Allocation	=	# of eligible FTE funded children/students	X	ESL Rate
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ALLOCATION CRITERIA

1. ESL funding may be claimed for **funded children/students** who require additional English language supports and instruction to achieve grade level expectations in English and other subject areas. Annual assessment documentation must be kept on file at the **school** that supports the coding and funding of these students.
2. **Funded children/students** eligible for ESL funding must be coded either:
 - a) Foreign born code 301; or
 - b) Canadian born code 303.
3. Two enrolment counts are taken for ESL funding for eligible **funded children/students**, one on the **September count date**, and another on the **March count date**.
Each count will be used for funding 50 per cent of the **school year**, unless the **March count** of ESL students is lower than the **September count**, then the **September count** will be used for the entire **school year**.
4. **ESL funded children** between the ages of 3 years 6 months and 4 years 6 months on September 1 that are identified after the **September count date** and reported on the **March count** will be eligible for 50 per cent ECS ESL Funding and 50 per cent of the ECS Base Instruction Funding.
5. Funding is provided for a maximum of 5 years for eligible ESL **funded children/students**.
6. **Funded students** enrolled in home education, **blended**, **outreach** or **on-line programs** are not eligible for funding under this section.

REVISED

REFERENCES

[English as a Second Language \(ESL\)](#)

[Funding for Early Learners: ESL/Francisation](#)

[ESL Fact Sheet](#)

[K-12 ESL Proficiency Benchmarks](#)

Section 1.7 — Francisation Funding (Francophone Regional Authorities only)

ALLOCATION FORMULA

Francisation Allocation	=	# of eligible Francisation FTE funded children/students	X	Francisation Rate
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ALLOCATION CRITERIA

1. **Francisation** funding may be claimed for **funded children/students** who require additional French Language supports and instruction to achieve grade level expectations in Français and other subject areas. Annual assessment documentation must be kept on file at the **school** that supports the coding and funding of these students.
2. **Funded children/students** eligible for **Francisation** must be coded either:
 - a) Foreign born – code 307; or
 - b) Canadian born – code 306
3. Two enrolment counts are taken for **Francisation** Funding, one on the **September count date** and another on the **March count date**.
Each count will be used for funding 50 per cent of the **school year**, except, if the **March count** of **Francisation** students is lower than the **September count** then the **September count** will be used for the entire **school year**.
4. **Francisation funded children** who are between the ages of 3 years 6 months to less than 4 years 6 months old on September 1, that are identified after the **September count date** and reported on the **March count**, will be eligible for both 50 per cent ECS **Francisation** Funding and 50 per cent ECS Base Instruction Funding.
5. Funding will be provided for a maximum of 5 years for each eligible **funded child/student**.
6. **Funded students** enrolled in home education, **blended**, **outreach** or **on-line programs** are not eligible for funding under this section.
7. Francophone Regional Authorities may claim **Francisation** and ESL Funding for the same child/student.

REVISED

REFERENCES

[Francisation - Foire aux questions](#)

[Francisation Proficiency Benchmarks](#)

Section 1.8 — First Nations, Métis and Inuit (FNMI) Education Funding

ALLOCATION FORMULA

FNMI Education Allocation	=	# of FTE FNMI children/students	X	FNMI Rate
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ALLOCATION CRITERIA

1. This funding is provided to assist school jurisdictions meet their local needs for FNMI students/children who may require program planning and instructional supports to achieve grade level expectations.
2. FNMI funding for **school jurisdictions** is based on the number of self-identified FNMI **FTE children/students**. Funding for level 2 **accredited funded private schools** is based on the number of self-identified FNMI **FTE students** only. Note: does not include FNMI **FTE children**.
3. The following types of self-identified FNMI students/children who reside off reserve are funded by Alberta Education and should be coded as follows:
 - a) Code 331 Aboriginal Learner – Status Indian/First Nations
 - b) Code 332 Aboriginal Learner – Non Status Indian/First Nations
 - c) Code 333 Aboriginal Learner – Métis
 - d) Code 334 Aboriginal Learner – Inuit.

These students/children are offered the option to self-identify through a signed declaration on the school registration form. **Schools** are then responsible to ensure that students and parents are provided with an opportunity annually to verify demographic information on the student record. This may be done in a variety of ways, depending on district procedures. For more information on annual verification please see the *Information for School Authorities* document on the Aboriginal Learner Data Collection Initiative (ALDCI) webpage.

4. **First Nations students who reside on a reserve** and who attend an Alberta school off reserve, are funded by the Government of Canada and do not qualify for funding under this section. These students should be coded 330 for funding purposes.
5. In addition to the 330 code, they should also be coded as 331 if they choose to self-identify for data collection purposes under the ALDCI. Therefore, both codes may be entered for these students and the 330 code will override the 331 for funding purposes.
6. **Funded students** enrolled in home education or **blended programs** are not eligible for funding under this section.

REFERENCES

[Aboriginal Learner Data Collection Initiative](#)

[The First Nations, Métis and Inuit Education Policy Framework](#)

[ALDCI Information for School Authorities](#)

Section 1.9 — Socio-Economic Status (SES) Funding

ALLOCATION FORMULA

SES Allocation	=	Incident Rate	X	FTE funded enrolment	X	SES Rate
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1. The Incidence Rate's for **school jurisdictions** and **charter schools** are determined by School Finance using the following six indicators. The first five are provided by Statistics Canada and the last one by Alberta Education:
 - a) average number of years of education of mothers in families with children;
 - b) per cent of families, with children, headed by a lone parent;
 - c) per cent of families, with children, who own their dwelling;
 - d) average income of families with children;
 - e) per cent of parents, with children, who have no post-secondary education;
 - f) transience rate, based on a student mobility rate.
2. The incidence rate for **Francophone Regional Authorities** is the weighted average of the incidence rates of the public and separate **school jurisdictions** in which each of the **schools** is located.
3. Students enrolled in home education are not counted for funding under this section.

School Jurisdiction	SES Incidence Rate
Almadina School Society	0.500
Aspen View Public School Division No. 78	0.224
Aurora School Ltd.	0.165
Battle River Regional Division No. 31	0.195
Black Gold Regional Division No. 18	0.180
Boyle Street Education Centre	1.000
Buffalo Trail Public Schools Regional Division No. 28	0.184
Calgary Arts Academy Society	0.156
Calgary Girls' School Society	0.130
Calgary Roman Catholic Separate School District No. 1	0.185
Calgary School District No. 19	0.218
Calgary Science School Society	0.201
Canadian Rockies Regional Division No. 12	0.219
CAPE – Centre for Academic and Personal Excellence Institute	0.226
Chinook's Edge School Division No. 73	0.191
Christ the Redeemer Catholic Separate Regional Division No. 3	0.178
Clearview School Division No. 71	0.178
East Central Alberta Catholic Separate Schools Regional Division No. 16	0.194
East Central Francophone Education Region No. 3	0.203
Edmonton Catholic Separate School District No. 7	0.237
Edmonton School District No. 7	0.256
Elk Island Catholic Separate Regional Division No. 41	0.153
Elk Island Public Schools Regional Division No. 14	0.175
Evergreen Catholic Separate Regional Division No. 2	0.177
Foothills School Division No. 38	0.180
Fort McMurray Public School District No. 2833	0.187
Fort McMurray Roman Catholic Separate School District No. 32	0.175
Fort Vermilion School Division No. 52	0.200
Foundations for the Future Charter Academy Charter School Society	0.186
Golden Hills School Division No. 75	0.221
Grande Prairie Roman Catholic Separate School District No. 28	0.181
Grande Prairie School District No. 2357	0.219

School Jurisdiction	SES Incidence Rate
Grande Yellowhead Public School Division No. 35	0.218
Grasslands Regional Division No. 6	0.185
Greater North Central Francophone Education Region No. 2	0.229
Greater Southern Public Francophone Education Region No. 4	0.205
Greater Southern Separate Catholic Francophone Education Region No. 4	0.168
Greater St. Albert Roman Catholic Separate School District No. 734	0.165
High Prairie School Division No. 48	0.280
Holy Family Catholic Regional Division No. 37	0.247
Holy Spirit Roman Catholic Separate Regional Division No. 4	0.211
Horizon School Division No. 67	0.193
Lakeland Roman Catholic Separate School District No. 150	0.242
Lethbridge School District No. 51	0.227
Living Waters Catholic Regional Division No. 42	0.221
Livingstone Range School Division No. 68	0.221
Lloydminster Public School Division	0.200
Lloydminster Roman Catholic Separate School Division	0.200
Medicine Hat Catholic Separate Regional Division No. 20	0.211
Medicine Hat School District No. 76	0.231
Mother Earth's Children's Charter School Society	0.214
New Horizons Charter School Society	0.114
Northern Gateway Regional Division No. 10	0.207
Northern Lights School Division No. 69	0.227
Northland School Division No. 61	0.298
Northwest Francophone Education Region No. 1	0.206
Palliser Regional Division No. 26	0.191
Parkland School Division No. 70	0.172
Peace River School Division No. 10	0.238
Peace Wapiti School Division No. 76	0.194
Pembina Hills Regional Division No. 7	0.198
Prairie Land Regional Division No. 25	0.182
Prairie Rose School Division No. 8	0.224
Red Deer Catholic Regional Division No. 39	0.203
Red Deer Public School District No. 104	0.232
Rocky View School Division No. 41	0.145
St. Albert Public School District No. 5565	0.178
St. Paul Education Regional Division No. 1	0.195
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	0.225
Sturgeon School Division No. 24	0.182
Suzuki Charter School Society	0.169
Valhalla School Foundation	0.194
Westmount Charter School Society	0.121
Westwind School Division No. 74	0.205
Wetaskiwin Regional Division No. 11	0.231
Wild Rose School Division No. 66	0.205
Wolf Creek School Division No. 72	0.223

REVISED

Section 1.10 — Inclusive Education Funding

This funding supports inclusive education to ensure school jurisdictions have the flexibility to support the unique needs of every **funded child/student**.

School jurisdictions are eligible for all four allocations below. **Charter schools** are only eligible for the Additional Per Student Allocation (#4 below).

SCHOOL JURISDICTIONS ALLOCATION FORMULA

Inclusive Education	=	Supports and Services Allocation	+	Differential Modifiers Allocation	+	Program Equity Allocation	+	Additional Per Student Allocation
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1. SUPPORTS AND SERVICES ALLOCATION

This component provides funding for supports and services that benefit all students in an inclusive education system, such as instructional and community supports.

REVISED

FTE Funded Enrolment	X	\$457.34
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2. DIFFERENTIAL MODIFIERS ALLOCATION

This component recognizes differential modifiers that address diversity factors that vary across boards to ensure an equitable distribution of funding. These modifiers are research-based incidence indicators in three areas: socio-economic, diagnostic and geographic.

REVISED

Differential Factor Funding	Data Source	Funding Trigger
Average Income	Statistics Canada	If below provincial average
% Who Own Dwelling	Statistics Canada	If below provincial average
Mothers' Average Years of Education	Statistics Canada	If below provincial average
% Lone Parent Families	Statistics Canada	If above provincial average
% Parents No Degree / Certificate	Statistics Canada	If above provincial average
Low Weight for Gestational Age	Alberta Health	If in highest tier
First Nations, Métis and Inuit	Self-Identified	If above provincial average
Refugee*	Citizenship and Immigration Canada	If students are identified
Children In Care	Alberta Human Services	If above provincial average
Distance	Alberta Education / Jurisdictions	If central office > than 40 km from a major centre

*see definition of **Refugee Student** in the Glossary

REVISED

3. PROGRAM EQUITY ALLOCATION (formerly Transition Funding)

If the 2013/2014 Inclusive Education funding for Supports and Services plus Differential Modifiers is less than what a jurisdiction received in 2011/2012 funding for Severe Disabilities Profile plus ECS mild/moderate and ECS gifted/talented, the jurisdiction will receive a Program Equity Allocation equal to their 2012/2013 Transition Funding amount.

REVISED

4. ADDITIONAL PER STUDENT ALLOCATION (for **school jurisdictions and charter schools**)

FTE Funded Enrolment	X	\$56.10
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ALLOCATION CRITERIA

REVISED

1. **School jurisdictions** are eligible for funding under all four allocation components in this section. **Charter schools** are only eligible for the Additional Per Student funding allocation.

NEW

2. Program Unit **Funded children** are not eligible for funding under this section.
3. **Accredited funded private schools** and **private ECS operators** are not eligible to receive funding under this section.

REVISED

4. To receive Inclusive Education funding for refugee students, students must be coded as 640. Refugee students will be included in the Inclusive Education funding calculation for a maximum of 5 years from the documentation date.

NEW

5. **School Jurisdiction** Inclusive Education allocation amounts and Grant Calculation Sheets are available on the Extranet under School Finance.

Section 1.11 — Northern Allowance Funding

ALLOCATION FORMULA

$$\text{Northern Allowance Allocation} = \left(\frac{\text{Lower Zone FTE funded enrolment}}{\text{Lower Zone Rate}} \right) + \left(\frac{\text{Intermediate Zone FTE funded enrolment}}{\text{Intermediate Zone Rate}} \right) + \left(\frac{\text{Upper Zone FTE funded enrolment}}{\text{Upper Zone Rate}} \right)$$

ALLOCATION CRITERIA

- Northern allowance funding is provided to eligible **school jurisdictions** based on the **FTE funded enrolment** of all **schools** located in their respective zones. Funding for eligible level 2* **accredited funded private schools** is based on **FTE funded students**.
- Zones are described as follows:
 - Lower Zone – **schools** located between the 55th and 56th parallels of latitude.
 - Intermediate Zone – **schools** located between the 56th and 57th parallels of latitude.
 - Upper Zone – **schools** located north of the 57th parallel of latitude.
- The zone in which a **school** is located is determined from the legal land description of the physical location of the **school**.
- Funded students** enrolled in **home education**, **online programs** and Hutterite colony schools are not eligible for funding under this section.

*As per Accountability and Declaration Form 13AE3.0

Section 1.12 — Small Schools by Necessity Funding

NEW

Metro **school jurisdictions** are not eligible for this funding

ALLOCATION FORMULA

$$\text{Small Schools by Necessity} = \left(\frac{\text{Total Base Allocation} + \text{Total Variable Allocation}}{\text{Closed School Allocation (where applicable)}} \right) \times \left(\frac{\text{Total \# of Small Schools by Necessity}}{\text{Total \# of Small Schools}} \right)$$

- TOTAL BASE ALLOCATION:
 - for each school with a '**FTE funded enrolment**' of 150 or fewer; Base Allocation = \$88,281.
 - for each school with a '**FTE funded enrolment**' greater than 150 but fewer than 226.

$$\text{Base Allocation} = \$88,281 - \left[\left(\frac{\$88,281}{76} \right) \times \left(\text{FTE Funded Enrolment} - 150 \right) \right]$$

The Total Base Allocation is the sum of a) and b) for all schools in each category.

2. TOTAL VARIABLE ALLOCATION:

Each school is categorized according to Table 1 below. A school that does not fit clearly into one of the categories in the Table should be included under the category that is a best fit. For example, a school with enrolment in Grades 7 to 9 or a school with enrolment in K to 8, the best fit category would be K to 9. For a school with enrolment in Grades 9 to 12, the best fit category would be K to 12.

TABLE 1

Grade Category	School Rate	Peak Enrolment	Small School FTE Funded Enrolment Limit	# of Grades in the Grade Configuration
K to 3	\$588.54	40	80	3.5
K to 6	\$1650.36	80	150	6.5
K to 9	\$1,884.96	80	220	9.5
K to 12	\$2,943.72	80	290	12.5

Once each school is categorized, the data from Table 1 is used in the following formulas to calculate the variable allocation for each school.

The Total Variable Allocation is the sum of a) and b) for all schools in each category.

$$\text{Variable Allocation} = \text{Unadjusted FTE funded enrolment rate} \times \text{Grade Factor} \times \text{FTE funded Enrolment}$$

Where

$$\text{Grade Factor} = \frac{\text{Actual \# of Grades with FTE funded enrolment}}{\text{\# of Grades in the Grade Configuration}}$$

And

For each school with a '**FTE funded enrolment**' fewer than or equal to the Peak Enrolment (see Table 1):

a)

$$\text{Unadjusted FTE funded enrolment rate} = \left(\frac{\text{School Rate}}{\text{Peak Enrolment}} \right) \times \text{FTE funded enrolment}$$

b) For each school with a '**FTE funded enrolment**' greater than the peak enrolment but fewer than or equal to the small school ***FTE funded enrolment** limit (see Table 1):

$$\text{Unadjusted FTE funded enrolment rate} = \text{School Rate} - \left[\text{Smoothing Factor} \times \left(\text{FTE funded enrolment} - \text{Peak Enrolment} \right) \right]$$

Where

$$\text{Smoothing Factor} = \frac{\text{School Rate}}{\text{Small school FTE funded Enrolment Limit} - \text{Peak Enrolment}}$$

3. TOTAL NUMBER OF SMALL SCHOOLS:

The total number of small schools is the total number of schools in the jurisdiction that have been allocated funding for either the Base or Variable Allocations, or both.

4. TOTAL NUMBER OF SMALL SCHOOLS BY NECESSITY:

Each small school (identified in # 3) is deemed to be 'necessary' or 'not necessary' based on the transportation of its **FTE weighted enrolment** to nearby receiving schools in accordance with the following rules:

- a) the **distance** from the small school to the receiving schools must be within 25 km for schools in rural areas, and within 6 km for schools in urban areas. Urban areas are defined as Edmonton, Calgary, Red Deer, Lethbridge, Medicine Hat, Fort McMurray, Grande Prairie, St. Albert, Sherwood Park, Spruce Grove, and Stony Plain.
- b) the receiving schools must have available capacity to accommodate the additional students. Available capacity at a receiving school is defined as 85 per cent of the **school building** capacity, less the **FTE weighted enrolment**.
- c) the small school **FTE weighted enrolment** can be designated to a maximum of two receiving schools per grade configuration. Grade configurations are defined as K – 6, 7 – 9, and 10 – 12.

If all conditions above are met, the small school under scrutiny will be considered not necessary. If any of the conditions above are not met, the small school will be considered by necessity. The total number of small schools by necessity is the total number of schools that do not meet all three conditions.

5. CLOSED SCHOOLS ALLOCATION:

In the 2004-2005 **school year school jurisdictions** started to receive Small Schools by Necessity Funding for those **schools** closed that would have qualified as a Necessary Small School. The funding is provided at declining rates as follows:

First Year School Closed	100% of Small Schools by Necessity Funding
Year 2	75%
Year 3	50%
Year 4	25%
Year 5	0%

Schools that closed before the 2004-2005 **school year** are not eligible for this funding.

6. Students enrolled in **schools of choice** such as outreach, home education, **charter schools**, hutterite colony schools are not counted for funding under this section.
7. **School Jurisdiction** Small Schools By Necessity Grant Calculation Sheets are available on the Extranet under School Finance.
8. Metro **school jurisdictions** are not eligible for this funding.

NEW

NEW

Section 1.13 — Small Board Administration Funding

ALLOCATION FORMULA (excluding non-operating school boards)*

Funding is provided to eligible **school jurisdictions** using a), b) or c) below:

Small **School Board** Administration Allocation

= a) \$470,825.88 for a **school jurisdiction** (excluding **charter schools**) with **FTE funded enrolment** of 2,000 students or less

OR

b) For a **school jurisdiction** (excluding **charter schools**) with a **FTE funded enrolment** between 2,000 and 3,000:

$$\$470,825.88 - \left[\$470.83 \times \left(\text{FTE funded enrolment} - 2,000 \right) \right]$$

OR

c) For **charter schools** use the following formulas:

FTE Funded Enrolment	Allocation Formula
i. less than 500	\$193,837
ii. Between 500 - 2,000	(i) + $\left[\$107 \times \left(\text{enrollment} - 500 \right) \right]$
iii. between 2,001 - 3,000	(i) + (ii) - $\left[\$464 \times \left(\text{enrollment} - 2,000 \right) \right]$
iv. greater than 3,000	No Small Board Administration Allocation

*Funding under this section for a **non-operating school board** will be based on the lesser of an approved administration and governance budget submitted to the School Finance Branch or actual administration and governance costs as reflected in the Audited Financial Statements.

REVISED

Section 1.14 — Equity of Opportunity Funding

ALLOCATION FORMULA

$$\text{Equity of Opportunity} = \text{Per Student Allocation} + \text{Density Allocation} + \text{Distance Allocation}$$

1. PER STUDENT ALLOCATION

REVISED

$$\text{FTE Funded Enrolment} \times \$101$$

School jurisdictions, charter schools, accredited funded private schools and private ECS operators are eligible for funding under the Per Student allocation. Level 1 and 2 **accredited funded private schools** receive 60 per cent and 70 per cent respectively of the school jurisdiction rate for students in Grades 1 to 12. **Funded ECS children** will be funded at 50 per cent of the above rate.

Home Education students are not eligible for this allocation.

2. DENSITY ALLOCATION

REVISED

$$\left(\frac{\text{Effective Transportation Area}}{\text{FTE Funded Enrolment}} \right) \times \text{FTE Remote Rural Enrolment} \times \$420$$

Only **school jurisdictions** with **schools** in population centres of less than 5,000 people are eligible for funding under the Density allocation.

Effective Transportation Area is the same as that used in the calculation of Rural Transportation funding.

FTE Remote Rural Enrolment is defined as **funded children/students** enrolled in **schools** in population centres of less than 5,000 people.

The following are not eligible for funding under the Density allocation: **funded students in charter schools, accredited funded private schools, private ECS operators**, Home Education programs, **online programs** (Code 620), **Institutions** (Code 550), and Hutterite colony schools.

3. DISTANCE ALLOCATION

REVISED

$$(\text{One-way distance of school to closest Major Service Centre} - 40 \text{ kms}) \times \text{FTE Funded Enrolment} \times \$1.45$$

Only **school jurisdictions** and **charter schools** with **schools** that are further than 40 kilometers from a Major Service Centre are eligible for funding under the Distance allocation.

The following are not eligible for funding under the Distance allocation: **funded students in accredited funded private schools, private ECS operators**, Home Education programs, **online programs** (Code 620), **Institutions** (Code 550), and Hutterite colony schools.

A Major Service Centre is defined for this allocation as Calgary, Edmonton, Grande Prairie, Lethbridge, Medicine Hat and Red Deer.

Funded children in ECS programs are counted as 0.5 FTE in all three allocations.

Section 1.15 — Hutterite Colony Schools Funding

ALLOCATION FORMULA

Hutterite Colony School Funding	=	# of colony schools with funded children/students	X	Rate per colony school
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A **school jurisdiction** may only charge a fee when it can substantiate that the cost of providing services for students in colony **schools** exceeds the funding they are receiving for those students. In these situations an application must be made to the Assistant Deputy Minister, Strategic Services Division, Alberta Education for permission to levy a fee on individual Hutterite colonies. Before making application, **school jurisdictions** must have:

1. pooled all funding associated with the colony **school(s)** – this includes Hutterite Colony Schools Funding, Base Instruction Funding, Socio-Economic Status Funding, Special Needs Funding, etc.; and
2. proof of consultation with the Hutterite colony affected when developing the application.

SECTION 1.16 — Francophone Equivalency (Francophone Regional Authorities)

ALLOCATION FORMULA

Francophone Equivalency Access (FEA) Funding	=	Eligible # of funded students Grade 1 - 12	X	FEA Rate
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ALLOCATION CRITERIA

In accordance with the *Canadian Charter of Rights and Freedoms* (section 23), this funding is available to **Francophone Regional Authorities** to allow students access to programming that is equivalent to that being offered by English-language schools.

SECTION 1.17 — Plant Operations and Maintenance (School Jurisdictions)

ALLOCATION FORMULA

Plant Operations and Maintenance Allocation	=	$\left[\begin{array}{c} \text{Base} \\ \text{Line} \\ \text{Funding} \end{array} \times \left(1 + \frac{\text{Sparsity-Distance}}{\text{Factor}} \right) \right] + \begin{array}{c} \text{Travel} \\ \text{Time} \\ \text{Allowance} \end{array} + \begin{array}{c} \text{Small School} \\ \text{Necessity} \\ \text{Differential} \end{array}$
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1. **BASELINE FUNDING:**

REVISED

POM calculation is based on the following rates applied to the **FTE Funded enrolment** taken from the **Frozen Funded Head Count** of the previous year. Online students (code 620) are at 0.1 FTE for the purpose of this grant.

REVISED

Grades	Rate per Funded FTE
K – 6	\$795.30
7 – 9	\$751.18
10 – 12	\$755.38

REVISED

2. SPARSITY-DISTANCE FACTOR:

This component makes adjustments for sparsity and **distance** factors in each jurisdiction. The following table provides the Sparsity-Distance Index for each school jurisdiction.

Sparsity-Distance Index Table

School Jurisdiction	Sparsity-Distance Index
Almadina School Society	1.00
Aspen View Public School Division No. 78	1.03
Aurora School Ltd.	1.00
Battle River Regional Division No. 31	1.02
Black Gold Regional Division No. 18	1.00
Boyle Street Education Centre	1.00
Buffalo Trail Public Schools Regional Division No. 28	1.04
Calgary Arts Academy Society	1.00
Calgary Girls' School Society	1.00
Calgary Roman Catholic Separate School District No. 1	1.00
Calgary School District No. 19	1.00
Calgary Science School Society	1.00
Canadian Rockies Regional Division No. 12	1.02
CAPE – Centre for Academic and Personal Excellence Institute	1.00
Chinook's Edge School Division No. 73	1.02
Christ the Redeemer Catholic Separate Regional Division No. 3	1.02
Clearview School Division No. 71	1.04
East Central Alberta Catholic Separate Schools Regional Division No. 16	1.03
East Central Francophone Education Region No. 3	1.07
Edmonton Catholic Separate School District No. 7	1.00
Edmonton School District No. 7	1.00
Elk Island Catholic Separate Regional Division No. 41	1.00
Elk Island Public Schools Regional Division No. 14	1.00
Evergreen Catholic Separate Regional Division No. 2	1.01
Foothills School Division No. 38	1.00
Fort McMurray Public School District No. 2833	1.06
Fort McMurray Roman Catholic Separate School District No. 32	1.06
Fort Vermilion School Division No. 52	1.13
Foundations for the Future Charter Academy Charter School Society	1.00
Golden Hills School Division No. 75	1.01
Grande Prairie Roman Catholic Separate School District No. 28	1.05
Grande Prairie School District No. 2357	1.04
Grande Yellowhead Public School Division No. 35	1.04
Grasslands Regional Division No. 6	1.02

School Jurisdiction	Distance/Sparsity Index
Greater North Central Francophone Education Region No. 2	1.07
Greater Southern Public Francophone Education Region No. 4	1.07
Greater Southern Separate Catholic Francophone Education Region No. 4	1.00
Greater St. Albert Roman Catholic Separate School District No. 734	1.00
High Prairie School Division No. 48	1.04
Holy Family Catholic Regional Division No. 37	1.05
Holy Spirit Roman Catholic Separate Regional Division No. 4	1.03
Horizon School Division No. 67	1.04
Lakeland Roman Catholic Separate School District No. 150	1.04
Lethbridge School District No. 51	1.02
Living Waters Catholic Regional Division No. 42	1.03
Livingstone Range School Division No. 68	1.02
Lloydminster Public School Division	1.02
Lloydminster Roman Catholic Separate School Division	1.02
Medicine Hat Catholic Separate Regional Division No. 20	1.02
Medicine Hat School District No. 76	1.02
Mother Earth's Children's Charter School Society	1.00
New Horizons Charter School Society	1.00
Northern Gateway Regional Division No. 10	1.03
Northern Lights School Division No. 69	1.04
Northland School Division No. 61	1.09
Northwest Francophone Education Region No. 1	1.09
Palliser Regional Division No. 26	1.02
Parkland School Division No. 70	1.00
Peace River School Division No. 10	1.07
Peace Wapiti School Division No. 76	1.07
Pembina Hills Regional Division No. 7	1.02
Prairie Land Regional Division No. 25	1.07
Prairie Rose School Division No. 8	1.07
Red Deer Catholic Regional Division No. 39	1.01
Red Deer Public School District No. 104	1.01
Rocky View School Division No. 41	1.00
St. Albert Public School District No. 5565	1.00
St. Paul Education Regional Division No. 1	1.03
St. Thomas Aquinas Roman Catholic Separate Regional Division No. 38	1.01
Sturgeon School Division No. 24	1.00
Suzuki Charter School Society	1.00
Valhalla School Foundation	1.00
Westmount Charter School Society	1.00
Westwind School Division No. 74	1.03
Wetaskiwin Regional Division No. 11	1.01
Wild Rose School Division No. 66	1.04
Wolf Creek School Division No. 72	1.02

3. TRAVEL TIME ALLOWANCE:

REVISED

This component allows for maintenance staff travel time and is determined by taking the previous year's travel time allowance amount and adding any grant rate increase to it.

4. SMALL SCHOOLS BY NECESSITY (SSBN) DIFFERENTIAL:

- a) This component is a supplemental adjustment for SSBN and is the sum of the following calculations:
 - i. SSBN Differential X K-6 per cent of total funded enrolments X \$795.30 per student
 - ii. SSBN Differential X Gr. 7 – 9 per cent of total funded enrolments X \$751.18 per student
 - iii. SSBN Differential X Gr. 10 – 12 per cent of total funded enrolments X \$755.38 per student
- b) Each school's SSBN Differential is determined as follows:
 - i. (school's capacity X 85 per cent) less school's enrolment,
 - ii. the total SSBN differential is the sum of the SSBN differentials calculated for each school.

The "per cent of total funded enrolments" is calculated by dividing the previous year funded enrolment for the grade range by the total previous year funded enrolment (across all grades) for the **school jurisdiction**. The jurisdiction's previous year "funded enrolments" are calculated using the same criteria as for the Baseline Funding component.

The SSBNs used in this formula are those that qualified for SSBN funding in the previous **school year**.

REVISED

- 5. Metro **school jurisdictions** and **charter schools** are not eligible for the SSBN component of this funding.
- 6. **School jurisdictions** that provide permanent leased space to another **school authority** for educational purposes and that receive Infrastructure Maintenance and Renewal funding for that space in lieu of lease support funding, will receive an adjustment/increase to its Plant Operations and Maintenance funding allocation to recognize the ongoing insurance and administrative costs associated with the leased space.

REVISED

- 7. **School jurisdictions** will be advised of their allocation amount by email from the School Finance Branch. The Plant Operations and Maintenance Grant Calculation Sheets are available on the Extranet under School Finance.

Section 1.18 — Charter Schools Funding

ALLOCATION FORMULA

The funding formula and rates under Part 1, Part 3, Part 5, Part 6; and Part 8 that apply to **school jurisdictions**, also apply to **charter schools**. However, **charter schools** are not eligible to claim funding under sections 1.3 Home Education, 1.12 Small Schools by Necessity, and 6.5 Debt Retirement.

ALLOCATION CRITERIA

1. BASE INSTRUCTION FUNDING:

Funds are provided to **charter boards** for each **funded student** enrolled in an established **charter school** whose charter has been approved by the **Minister**.

2. TRANSPORTATION:

- a) A **charter board** can enter into a transportation agreement with a **school jurisdiction** for student transportation. Under such an agreement, the local **school jurisdiction** may claim funding for the transportation of **charter school** students as if they were students in the **school jurisdiction**.
 - b) If a **charter board** is unable to reach an agreement with a **school jurisdiction** for the transportation of its urban students, the **charter school** may claim transported students at the metro urban regular transportation rate.
 - c) **Charter boards** who are unable to reach an agreement with a **school jurisdiction** for the transportation of their rural students, may claim, with respect to each **eligible passenger** resident in a **rural school jurisdiction**, the base **density** rate provided per **eligible passenger** transported for which the **board** of that **rural school jurisdiction** is eligible. Where an eligible passenger resides within the boundaries of a separate district, funding will be provided for that eligible passenger at the lowest **density** rate between the separate district and the public district.
 - d) For parent-provided transportation, a **charter board** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the authority receives for the student along with the cost of providing comparable service.
3. Funding for **students with severe disabilities** attending **charter schools** is provided based on the eligibility of individual students and based on the severe disability rates in section 8.3. **Charter schools** that have **students with a severe disability** must comply with the Conditions and Requirements outlined in section 3.3.
4. The student count used by a **charter school** as of the **September count date** must not include students counted by another **school authority** on the **September count date**.

REVISED

REFERENCES

[Charter Schools Regulation](#)

[Charter Schools Handbook](#)

TRANSPORTATION

Section 1.19 — Boarding Funding

ALLOCATION FORMULA

$$\text{Boarding Allocation} = \frac{\# \text{ funded students eligible for funding}}{\text{funding}} \times \text{Funding Rate for Boarding}$$

ALLOCATION CRITERIA

1. The **parents** of the eligible **funded student** must reside in the **school jurisdiction**.
2. Boarding funding is paid if the **funded student** is directed by a **board** to attend a **school** in Alberta under section 53 of the *School Act* or a program of studies prescribed by the **Minister**.
3. Funding for boarding is not paid to a **school jurisdiction** for a **resident student** who is:
 - a) attending a **private school** outside Alberta when the education program has not been previously approved by the **Minister**; or
 - b) enrolled after the **September count date**;
 - c) boarded after November 30.

Section 1.20 — Rural Transportation Funding

ALLOCATION FORMULA

1. A rural **school jurisdiction** may apply for the following rural transportation funding:
 - a) Rural Transportation Support

$$\text{i. Basic Allocation} = \frac{\text{Eligible Passenger/Eligible Transported ECS Child}}{\text{Eligible Passenger/Eligible Transported ECS Child}} \times \text{Applicable Rural Transportation Rate}$$

PLUS

$$\text{ii. Distance Allocation} = \frac{\text{Applicable Eligible Transportation Distance (kms) for each Eligible Passenger/Eligible Transported ECS Child}}{\text{Eligible Passenger/Eligible Transported ECS Child}} \times \text{Applicable Distance Rate}$$

Total rural transportation support is the sum of the amounts calculated in i) and ii) above multiplied by the applicable **weighting factor** for each **eligible passenger** and **eligible transported ECS child**.

- b) Inter-School Transportation Support

Support to a rural **school jurisdiction** for a bus providing inter-school transportation to each group of 66 weighted **eligible passengers**, or portion thereof, is calculated as follows:

$$\text{Inter School Allocation} = \frac{\text{Daily km's (not including deadhead km's) of inter school transportation for the bus}}{\text{Daily km's (not including deadhead km's) of inter school transportation for the bus}} \times \frac{\# \text{ of days of inter-school transportation in the school year for the bus}}{\# \text{ of days of inter-school transportation in the school year for the bus}} \times \text{Support Rate}$$

The total annual support for inter-school transportation is the aggregate of the amounts calculated for each bus providing inter-school transportation.

c) Cooperative Transportation

In addition to regular rural transportation funding (above), **boards** that are transporting non-resident students who are **eligible passengers/eligible transported ECS children** - through a cooperative bussing arrangement- to a **school** of the **board**, or to another **school jurisdiction**, are eligible for the following funding incentive:

# of non-resident eligible passenger/eligible transported ECS children transported under a cooperative bussing arrangement	X	50% of the transporting board's Density Rate
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NEW

If a cooperative transportation agreement between two jurisdictions is terminated, transportation funding for students in both jurisdictions will remain at the per student rate that existed when the agreement was in place excluding cooperative transportation funding.

d) Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers
Refer to section 1.23, Special Transportation

ALLOCATION CRITERIA

1. General:

a) Funding is provided for an **eligible passenger** or **eligible transported ECS child** who resides in a rural area or a city, town, village or hamlet with a population of less than 10,000 (per most recent Municipal Affairs census). For municipalities with a population of 10,000 or greater refer to section 1.21 Urban Transportation.

b) Where the net support for student transportation of a **board** decreases in excess of 3 per cent as a result of a community population reaching 10,000 or as a result of movement between **density** grid columns, an adjustment may be determined for that jurisdiction based on the amount greater than 3 per cent.

REVISED

c) For parent-provided transportation, rural **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service.

d) Funding is not provided for a **funded student** counted under section 1.23 Special Transportation or a **funded child** counted under section 1.25, ECS Special Transportation.

e) **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the rural transportation rate and are not eligible for funding under section 1.23, Special Transportation.

Students with disabilities who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under section 1.23, Special Transportation. (NOTE: all students on designated buses must be claimed under the same section.)

f) **First Nations Students who reside on a reserve** are not eligible for transportation funding.

2. Rural Transportation Funding:

a) Funding shall be based on the eligible **distance** from the student's residence to the nearest school in the attendance area or transportation service area in which the student resides.

If the student is directed by the **board** to attend another **school** for any of the following program considerations and the **school board** at its discretion transports the student to that school, transportation support shall be paid based on the **distance** from the student's residence to the school to which the student was directed. The following is a list of program considerations:

- i. **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;
- ii. Special Education Programs to meet the needs of **students with severe disabilities**;
- iii. Special Education Programs to meet the need of students with mild/moderate disabilities and gifted and talented students when **board** criteria have been met;
- iv. High School CTS Programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).

- If a **board** directs a **funded student** to a **school** outside their jurisdiction for any of the program considerations above then an **education service agreement** is required.
- b) The eligible distance criteria does not apply in the following situations:
 - i. An employee of a **school jurisdiction** accompanying a **student with a severe disability** or a **child with a severe disability/delay** who is transported to and from **school**.
 - ii. A **student/child with a severe disability** (except those coded as 45 or 47) requiring transportation to and from **school** and who is unable to walk safely to **school** as a result of their disability.
 - c) If a **resident student** of a **board** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.
 - d) Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding is determined by the **distance** to the **school** nearest the student's residence.
 - e) If a student who is not a **resident student** of the **board** accesses that **board's** transportation system in accordance with the Student Transportation Regulation, section 4, at a point 2.4 kilometers or more from the **school** attended, and where there is not a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service may claim only the **density** support for that student.
 - f) If a **board** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** and an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
 - g) A **school jurisdiction** which is providing transportation in only a portion of its area, for those **eligible passengers** residing in the jurisdiction but beyond the transportation service area and are transported through co-operative bussing arrangements with other **school jurisdictions**, area and **density** for the **school jurisdiction** shall be calculated on the basis of the area directly served by the **school jurisdiction** and the **eligible passengers** residing in that area.
 - h) If a **board** is providing transportation services under a cooperative bussing arrangement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services will be added to the transporting **board's effective transportation area** when determining the **density** rating for the transporting **board**.
 - i) Rural Transportation Funding is available only to rural **boards** operating student transportation systems. A **board** accessing transportation services for its **resident students** through a cooperative bussing arrangement is not eligible for rural transportation funding.
 - j) A **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of the **eligible passenger's resident board**, who resides outside the transportation service area of the resident **board** and accesses the bus route of the transporting **board**, may claim the **density** and the **distance** support from the **designated school** to the point where the student accesses the bus route for that **school**.
 - k) Students in a wheelchair who ride a **school bus** will be funded at 8 times the regular rate.
3. ECS Transportation:
- a) A **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **funded children** attending **ECS programs** at a service level that is consistent with the transportation of students under section 51(1) of the *School Act*.
 - b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total costs of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Education.

- c) A **school jurisdiction** may claim **eligible transported ECS children** it transports to programs operated by another **board** or a **private ECS operator** as **eligible passengers** if the **board** has a **transportation agreement** with the other **board** or **private ECS operator**.
 - d) **ECS children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under section 1.25, ECS Special Transportation.
4. Inter-School Transportation:
- a) Inter-School Transportation for students whose courses of study require a special **school** facility or equipment not available in the **school** they attend, may be claimed for support provided that:
 - i. the course of study is prescribed by the **Minister**;
 - ii. the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
 - iii. the course of study requires the use of the special **school** facility or equipment for at least 18 consecutive weeks.
 - b) Off-Campus Education Programs, recreational programs, and intermittent bussing between **schools** or to such activities as swimming programs are not eligible for inter-school transportation support.
5. Students in an **online program** or **outreach program** where they are accessing 50 per cent or more of their educational program at a **school** of the **board** or students in a **blended program**, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under Rural Transportation.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Rural **school jurisdictions** are required to submit electronically a Rural funding application to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, Rural Transportation Allocation Criteria and Funding Rates, and in accordance with the *School Act* and the *Student Transportation Regulation*.

Note: the Rural funding application includes the Rural Special Transportation section. Refer to section 1.23 Special Transportation for Rural Special Transportation Allocation Criteria.
2. Transportation support payments for each new **school year** will be paid at 100 per cent of the previous year's funded monthly amount until the review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. For purposes of calculating **density** support, the **effective transportation area** of the **school jurisdiction** is that taken as of the **September count date**.
5. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request:
 - a) geographic roadway maps of overall attendance areas and transportation service areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
 - c) individual bus route lists that includes stop locations and students transported;
 - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
 - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - f) copies of **educational services agreements**;

- g) copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators**;
- h) copies of completed route risk assessment forms;
- i) copies of contracts with:
 - i. operators of contracted busses for all transportation;
 - ii. **parents** providing transportation indicating the amount to be paid; and
 - iii. agents providing special transportation for **students with disabilities**.

Section 1.21 — Urban Transportation Funding

ALLOCATION FORMULA

1. An urban **school jurisdiction** may apply for the following urban transportation funding:

- a) URBAN TRANSPORTATION SUPPORT:

i.	Basic Allocation	=	Eligible Passenger/Eligible Transported ECS Child	X	Applicable Urban Transportation Rate
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PLUS

ii.	Distance Allocation	=	Applicable Eligible Transportation Distance (kms) for each Eligible Passenger/Eligible Transported ECS Child	X	Applicable Distance Rate
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Total urban transportation support is the sum of the amounts calculated in i) and ii) above multiplied by the applicable weighting factor for each **eligible passenger** and **eligible transported ECS child**. Note: the weighting factor and distance support only applies for students transported by yellow school bus.

The funding an urban jurisdiction receives for rural students will be calculated using the Rural Transportation Formula. These students cannot be included as **eligible passengers/eligible transported ECS children** under the Urban Transportation Formula.

- b) INTER-SCHOOL TRANSPORTATION SUPPORT:

Support to an urban **school jurisdiction** for a bus providing inter-school transportation to each group of 66 weighted **eligible passengers**, or portion thereof, is calculated as follows:

Inter-School Support	=	Daily km's (not including deadhead km's) of inter-school transportation for the bus	+	# of days of the inter-school transportation in the school year for the bus	X	Support Rate
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The total annual support for inter-school transportation is the aggregate of the amounts calculated for each bus providing inter-school transportation.

- c) COOPERATIVE TRANSPORTATION

In addition to the regular urban transportation funding (a) above, **eligible passengers/eligible transported ECS children** who are transported by yellow school bus as part of an urban cooperative bussing arrangement to a **school** of the **board** or to another **school jurisdiction**, are eligible for the following funding incentive:

REVISED

# of eligible passenger/eligible transported ECS children transported by yellow school bus under an urban cooperative bussing arrangement	X	15% of the applicable Urban Transportation Base Rate
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- d) Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers
Refer to section 1.23, Special Transportation.

2. Francophone Authorities within an Urban Area:

To recognize the dispersion of students for a Francophone authority within an urban **school jurisdiction** a weighted factor of 3.5 will be used for Francophone **eligible passengers** (Grades 1 – 12) and Francophone **eligible transported ECS children**.

Francophone Urban Transportation Allocation	=	$\left(\begin{array}{c} \text{Francophone} \\ \text{eligible} \\ \text{passengers} \\ \text{Grades 1 to 12} \end{array} + \begin{array}{c} \text{Francophone} \\ \text{eligible} \\ \text{transported} \\ \text{ECS children} \end{array} \right)$	X	3.5 (weighted factor)	X	Urban Francophone Transportation Rate
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ALLOCATION CRITERIA

1. General:

- a) Funding is provided for an **eligible passenger** or **eligible transported ECS child** who resides in a city, town, village or hamlet with a population of 10,000 or greater (per most recent Municipal Affairs census). For municipalities with a population of less than 10,000 refer to section 1.20, Rural Transportation.
- b) For parent-provided transportation, urban **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service.
- c) Funding shall not be paid under this section for a **funded student** who is counted under section 1.23, Special Transportation Funding, or a **funded child** who is counted under section 1.25, ECS Special Transportation.
- d) **Eligible passengers** with severe disabilities who ride on a regular route **school bus** will be claimed under this section using the urban transportation rate and are not eligible for funding under section 1.23, Special Transportation.

Students with disabilities who cannot, because of the severity of their disability, ride a regular route **school bus** can be claimed under section 1.23, Special Transportation. (NOTE: all students on designated buses must be claimed under the same section).

- e) **First Nations students who reside on a reserve** are not eligible for transportation funding.

2. Urban Transportation Funding:

- a) Transportation funding shall be based on the eligible **distance** from the student's residence to the nearest school in the attendance area or transportation service area in which the student resides.

If the student is directed by the **board** to attend another **school** for any of the following program considerations and the **school board** at its discretion transports the student to that school, transportation support shall be paid based on the **distance** from the student's residence to the school to which the student was directed. The following is a list of program considerations:

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- i. **Alternative French language programs** (including French immersion and bilingual programs) and **other language immersion programs**;
 - ii. Special Education Programs to meet the needs of **students with severe disabilities**;
 - iii. Special Education Programs to meet the need of students with mild/moderate disabilities and gifted and talented students when **board** criteria have been met;
 - iv. High School CTS Programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology).
- If a **board** directs a **funded student** to a **school** outside their jurisdiction for any of the program considerations above then an **education service agreement** is required.
- b) The eligible distance criteria does not apply in the following situations:
 - i. An employee of a **school jurisdiction** accompanying a **student with a severe disability** or a **child with a severe disability/delay** who is transported to and from **school**.
 - ii. A **student/child with a severe disability** (except those coded as 45 or 47) requiring transportation to and from **school** and who is unable to walk safely to **school** as a result of their disability.
 - c) If a **resident student** of an urban **school jurisdiction** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.
 - d) Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding is determined by the **distance** to the **school** nearest the student's residence.
 - e) If a **board** of an urban **school jurisdiction** transports students residing less than 2.4 km from the **school** within the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the students reside, to a **school** other than the **school** within the attendance area or transportation service area in which the students reside because the enrolment of that **school** is equal to or greater than its rated capacity, then the number of students transported that is equal to or greater than the number of students not resident within the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.
 - f) An urban **school jurisdiction** may receive funding for a student who is not a **resident student** of the **board** that accesses the **board's** transportation system in accordance with the Student Transportation Regulation, section 4, at a point that is 2.4 kilometers or more from the **school** in which the student could be enrolled.
 - g) If an urban **school jurisdiction** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **educational services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.
 - h) Students in a wheelchair who ride a **school bus** will be funded at 8 times the regular rate.
3. ECS Transportation:
- a) A **school jurisdiction** that claims ECS regular transportation funding must transport or make arrangements for the transportation of **eligible transported ECS children** at a service level that is consistent with the transportation of students under section 51(1) of the *School Act*.

- b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total costs of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Education.
 - c) A **school jurisdiction** may claim **eligible transported ECS children** it transports to programs operated by another **board**, a **private school**, or a **private ECS operator** as **eligible passengers** if the **board** has a **transportation agreement** with the other **board**, **private school**, or **private ECS operator**.
 - d) **ECS children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation Rate. Transportation funding for these children must be claimed under section 1.25, ECS Special Transportation.
4. Inter-School Transportation:
- a) Inter-School Transportation for students whose courses of study require a special **school** facility or equipment not available in the **school** they attend, may be claimed for support provided that:
 - i. the course of study is prescribed by the **Minister**;
 - ii. the course of study requires a special **school** facility or equipment not available at the **school** of daily attendance for those students; and
 - iii. the course of study requires the use of the special **school** facility or equipment for at least 18 consecutive weeks.
 - b) Off-Campus Education Programs, recreational programs, and intermittent bussing between **schools** or to such activities as swimming programs are not eligible for inter-school transportation support.
5. Students in an **online program** or **outreach program** where they are accessing 50 per cent or more of their educational program at a **school** of the **board** or students in a **blended program**, that are transported by the **board** to a **school**, may be claimed as **eligible passengers** under Urban Transportation.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Urban **school jurisdictions** are required to submit electronically an Urban funding application to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, Urban Transportation Allocation Criteria and Funding Rates, and in accordance with the *School Act* and the *Student Transportation Regulation*.

Note: the Urban funding application includes the Urban Special Transportation section. Refer to section 1.23, Special Transportation Funding, for Urban Special Transportation Allocation Criteria.
2. Transportation support payments for each new **school year** will be paid at 100 per cent of the previous year's funded monthly amount until the review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1, and continued until the new funding application is received and reviewed.
3. Only **funded students** and **funded children** enrolled on the **September count date** are eligible for funding. Special consideration for the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request.
 - a) geographic roadway maps of overall attendance areas and transportation service areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets);
 - c) individual bus route lists that includes stop locations and students transported;

- d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
- e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
- f) copies of **educational services agreements**;
- g) copies of **transportation agreements** with **school boards, private schools, charter schools and private ECS operators**;
- h) copies of completed route risk assessment forms;
- i) copies of contracts with:
 - i. operators of contracted busses for all transportation;
 - ii. **parents** providing transportation indicating the amount to be paid; and
 - iii. agents providing special transportation for **students with disabilities**.

Section 1.22 — Metro Urban Transportation Funding

ALLOCATION FORMULA

1. a) The number of **expected eligible passengers** to be included in the Metro Urban Transportation Funding formula is determined as follows:

(Residential Area x 75.80)	+	$\left(\frac{\text{Funded students and funded children}}{\text{X } 0.7300} \right)$	=	
LESS,				
0.75(# ECS Elem. Schools)	X	Lesser of: Average ECS-Elem. School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
0.400(# of Jr. High Schools)	X	Lesser of: Average Jr. High School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
0.250(# of Sr. High Schools)	X	Lesser of: Average Sr. High School enrolment in the jurisdiction or the average school enrolments for the 4 metro urban jurisdictions	=	
		Expected Eligible Passengers	=	

- b) The Metro Urban Transportation Funding a metro urban district may receive is determined as follows:

$$\text{Metro Urban Transportation Funding} = \left(\text{Expected Eligible Passengers} \times \text{Metro Urban Transportation Block Funding} \right) + \left(\left[0.8 \times \text{Severely Disabled Students (Grades 1 - 12)] (per Severe Disability profile)} \right] \times \text{Special Transportation Rate} \right)$$

- c) **ECS funded children** will be included in the Metro Urban Transportation Funding formula with the following adjustments to the coefficients/benchmarks:
- the average elementary **school** size will be adjusted to include **ECS funded children**;
 - the walk percentage will be reduced from 0.80 for elementary **schools** to 0.75 for **ECS – elementary schools**; and
 - the eligible enrolment coefficient will be reduced from 0.735 to 0.730.

ALLOCATION CRITERIA

- Edmonton School District No.7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary Roman Catholic Separate School District No. 1 are eligible for Metro Urban Transportation funding.
- Funding is determined using a **school** enrolment “benchmark”. The benchmark is the lesser of two values: the jurisdiction’s average **school** enrolment or the average **school** enrolment in the four metro urban jurisdictions. A benchmark is determined for each of the three levels (elementary, junior high and senior high).
- The number of **expected eligible passengers** is calculated using the following factors:
 - the benchmark for each level;
 - the number of **schools** by level;
 - the number of **funded students** and **ECS funded children**;
 - the residential area; and
 - the number of **funded students with severe disabilities** based on the jurisdiction profile.
- The following conditions are to be used in determining the number of **schools** servicing the three **school** levels in the public and separate **school boards** in Edmonton and Calgary:
 - institutions**, outreach **schools**, schools that solely serve home education **students**, and other special **schools** (**schools** where the majority of the **funded students** are special education needs students) as determined by School Finance are excluded;
 - an ECS-elementary school with fewer than 75 students is not counted;
 - an ECS-elementary school with 75 or more students and 3 or fewer grades will be counted as half an ECS-elementary school;
 - a junior high school with fewer than 75 students is not counted;
 - a senior high school with fewer than 75 students is not counted; and
 - a senior high school with fewer than 200 but with 75 or more students is counted as a junior high school.
- The formula used to calculate Metro Urban Transportation funding contains the number of **schools** by level, the residential area, and the number of **funded students** attending **schools** within the jurisdiction.

6. Metro urban **school jurisdictions** in Calgary and Edmonton which are transporting **eligible transported ECS children to board**-operated programs will be eligible for transportation funding under the Metro Urban Transportation Funding. The ECS enrolments will be included in the formula.
7. **ECS children with disabilities/delays** who require special transportation will be funded at the ECS Special Transportation rate. Transportation funding for these children must be claimed under section 1.25, ECS Special Transportation. **ECS children with a severe disability/delay** who qualify for PUF cannot be included in the count of **students with severe disabilities** in the Metro Urban Transportation formula.
8. Funding shall not be paid under this section for a **funded student** who is counted under section 1.23, Special Transportation Funding, or a **funded child** who is counted under section 1.25, ECS Special Transportation Funding.
9. Metro urban **school jurisdictions** receiving Metro Urban Transportation Funding must transport or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under section 51(1) of the *School Act*.
10. When a metro urban **school jurisdiction** accesses the Metro Urban Transportation Funding and has under its jurisdiction an area included in another municipality, the metro urban **school jurisdiction** may be reimbursed for each **eligible passenger** transported to **school** using the rural transportation formula, or, if the municipality is a city outside of Calgary or Edmonton, for each **eligible passenger** using the Urban Transportation formula. A metro urban **school jurisdiction** that is currently submitting a claim under this section and is seeking to claim either section 1.20, Rural Transportation funding or section 1.21, Urban Transportation funding must have approval from the **Minister**. Requests for approval should be submitted to the Business Operations and Stakeholder Support Branch.
11. A metro urban **school jurisdiction**, which has made an arrangement with a **charter school** to transport the **charter school's** students, may include the **funded students** attending the **charter school** for the purposes of calculating the number of **expected eligible passengers**. The **charter school** is not counted by the **school jurisdiction** in determining the number of **schools**.
12. A metro urban **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding the metro urban **school jurisdiction** receives from Alberta Education.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. Metro urban **school jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request.
 - a) geographic roadway maps of overall attendance areas and transportation service areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets);
 - c) individual bus route lists that includes stop locations and students transported;
 - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
 - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - f) copies of **educational services agreements**;
 - g) copies of **transportation agreements** with **school boards, private schools, charter schools and private ECS operators**;
 - h) copies of completed route risk assessment forms;

- i) copies of contracts with:
 - i. operators of contracted busses for all transportation;
 - ii. **parents** providing transportation indicating the amount to be paid; and
 - iii. agents providing special transportation for **students with disabilities**.

Section 1.23 - Special Transportation Funding (Gr. 1-12)

ALLOCATION FORMULA

1. a) Urban Special Transportation:

Special Transportation Allocation	=	# of students with disabilities transported (see Allocation Criteria 1)	X	Urban Special Rate
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- b) Rural Special Transportation:

Special Transportation Allocation	=	# of students with disabilities transported (see Allocation Criteria 1)	X	Rural Special Rate
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- c) Weekend Transportation

Weekend Transportation Allocation	=	# of students with disabilities transported on a weekend	X	Weekend Transportation Rate
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- d) Bus modification or purchase allowance to accommodate wheelchair passengers:

Funding is provided to **school jurisdictions** for up to 100 per cent of approved costs for the purchase of a wheelchair lift or ramp to be installed on a new or used bus. Prior written approval by the Director, Business Operations and Stakeholder Support Branch, is required. Invoices and proof of payment must be submitted to Business Operations and Stakeholder Support Branch for reimbursement.

ALLOCATION CRITERIA

1. Urban or rural **school jurisdictions** may receive Special Transportation Funding for resident **students with disabilities** riding on a bus designated only for the transportation of those **students with disabilities** who cannot, because of the severity of their disability/delay, use regular transportation services described in sections 1.20 Rural Transportation Funding or 1.21 Urban Transportation Funding.
2. All **school jurisdictions** (rural, urban and metro urban) transporting **children with disabilities/delays** shall claim ECS Special Transportation Funding under section 1.25.
3. Program or **school** location shall not be considered when determining eligibility for this funding.
4. Special Transportation Funding is provided for **students with disabilities** who require special transportation between their residences or boarding places and:
 - a) the **school** of a **school jurisdiction**;
 - b) an **accredited funded private school**; or

- c) A program at an **institution** operated and/or funded by Alberta Education:
 - i. which the **student with a disability** has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
 - ii. which is the closest suitable and available program offered.
- 5. To claim Special Transportation funding for a **student with a disability** attending an **accredited funded private school**, the **school jurisdiction** must have directed the student to attend that **school**.
- 6. For parent-provided transportation, **school jurisdictions** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the jurisdiction receives for the student along with the cost of providing comparable service.
- 7. Weekend transportation funding is provided to **school jurisdictions** when **students with disabilities** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:
 - a) the **school** of a **school jurisdiction**; or
 - b) an **accredited funded private school**.

Funding for weekend transportation is paid to the **school jurisdiction** of the **district** or **division** in which the **parent** of the **student with a disability** resides.

DOCUMENTATION AND REPORTING REQUIREMENTS

1. **School jurisdictions** are required to electronically submit their claims to the Business Operations and Stakeholder Support Branch by November 30. Payment is made on the basis of the submitted information, the Special Transportation Allocation Criteria and funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation*.
Please note that:
 - a) Rural Special Transportation information (including Weekend and Boarding Funding, if applicable) will be reported on the Rural funding application.
 - b) Urban Special Transportation information (including Weekend and Boarding Funding, if applicable) will be reported on the Urban funding application.
 - c) ECS Special Transportation refer to section 1.25.
2. Transportation support payments for each new **school year** will be paid at 100 per cent of the previous year's funded monthly amount until review of the new funding application has been completed. If the new funding application has not been received by December 31, the January payment will be reduced to 75 per cent of the previous year funded monthly amount retroactive to September 1 and continued until the new funding application is received and reviewed.
3. Only **funded students** enrolled on the **September count date** are eligible for funding. Special consideration on the **September count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.
4. **School jurisdictions** are required to retain the following information on file for a minimum of seven years and make it available for review by Alberta Education upon request.
 - a) geographic roadway maps of overall attendance areas and transportation services areas;
 - b) location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
 - c) individual bus route lists that includes stop locations and students transported;
 - d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
 - e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
 - f) copies of **education service agreements**;
 - g) copies of **transportation agreements** with **school boards, private schools, and charter schools** ;

- h) copies of completed route risk assessment forms;
- i) copies of contracts with:
 - i. written **transportation agreements** with agents, organizations, **parents** or other persons;
 - ii. records showing the amount to be paid on behalf of **students with disabilities** who require special transportation;
 - iii. agents providing special transportation for **students with disabilities**.

Section 1.24 — ECS Regular Transportation Funding (Private ECS Operators)

ALLOCATION FORMULA

eligible transported ECS children X Transportation Rate for **private ECS operators**

ALLOCATION CRITERIA

1. **Private ECS operators** with **funded children** who reside at least 2.4 kilometers from the **ECS program** in which they are enrolled and are being transported will be eligible for this funding.
2. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities/delays**, these costs can be claimed under section 1.5, ECS Program Unit Funding.
3. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **funded children** attending **ECS programs**. Transportation funding cannot be claimed if the **private ECS operator** has not provided or arranged transportation or if there was no cost to the **private ECS operator** for the transportation provided.
4. If the transportation of an **eligible transported ECS child** is not done by the **private ECS operator**, then a contract or signed agreement must be in place by October 31 with the company or person(s) transporting the **eligible transported ECS child**.

- REVISED**
5. For parent-provided transportation, **private ECS operators** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the jurisdiction receives for the child along with the cost of providing comparable service.
 6. If transportation of an **eligible transported ECS child** is done by taxi or a teacher aide, the ECS Regular transportation rate shall apply.
 7. To apply for ECS Regular Transportation Funding, **private ECS operators** are required to electronically submit their ECS transportation funding application to the Business Operations and Stakeholder Support Branch by October 31. Payment is made on the basis of the submitted information, Funding Allocation Criteria and Funding Rates. Please note that the electronic transportation claim form will have both regular and special transportation application forms.

School jurisdictions that provide transportation for a **funded child** will claim the **funded child** as an **eligible transported ECS child** under rural transportation, urban transportation or metro urban transportation block. For further details please refer to section 1.20, Rural Transportation Funding; section 1.21, Urban Transportation Funding; and section 1.22, Metro Urban Transportation Funding.

8. For **ECS programs** beginning in **September**, transportation funding is based on **funded child** registration information as of the **September count date**.

9. For **ECS programs** beginning after September 30, the count date for transportation will be the last **operating day** of the month in which the program begins. The Electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Branch within three weeks of that date.
10. **Eligible transported ECS children** who are registered after the **September count date** are not eligible for regular transportation funding.
11. **Private ECS operators** may enter into **transportation agreements** with **school jurisdictions** for the transportation of **eligible transported ECS children** enrolled in their programs. Funding for these children will be claimed by the **school jurisdictions** providing the transportation service.
12. A **private ECS operator** providing transportation to and from an **ECS program** may charge the **parent** of an **eligible transported ECS child** a fee for the transportation service. The fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Education.
13. **ECS operators** are to maintain records of:
 - a) names of children transported;
 - b) copies of completed route risk assessment forms;
 - c) actual costs of transportation; and
 - d) copies of written **transportation agreements** with agents, organizations, **parents** or other persons.

Section 1.25 — ECS Special Transportation Funding (School Authorities)

ALLOCATION FORMULA

ECS Special Transportation to and from School

# of transported children with disabilities/delays	X	ECS Special Transportation Rate (per round trip – max of 185 per child)
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Funded children transported by a parent (agreement in place)	X	Parent-provided ECS Transportation Rate
---	---	---

Family-Oriented ECS Programming Transportation

# of Family-Oriented Programming Sessions for children with severe disabilities/delays	X	ECS Special Transportation Rate (per session –min. 4 and max. of 36)
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ALLOCATION CRITERIA

1. Special Transportation
 - a) **ECS operators** may receive ECS Special Transportation funding for **ECS children with disabilities/delays** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.
 - b) **Distance** and **school** location shall not be considered when determining eligibility for funding.
 - c) Funding will be paid based on the number of days that a **child with a disability/delay** is transported to/from the **ECS program** up to a maximum of 185 days.

2. **Family-Oriented Programming** Transportation Funding
 - a) This transportation funding is for each scheduled **family-oriented programming** session delivered by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a severe disability/delay** receiving **family-oriented programming**.
 - b) Transportation funding is provided for each session with a minimum of 4 sessions and a maximum of 36 sessions for each program unit **funded child**.
3. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities/delays** these costs may be claimed under section 1.5, ECS Program Unit Funding.
4. An **ECS operator** that claims ECS Special Transportation funding must transport, or make arrangements for the transportation of **children with disabilities/delays** attending the **ECS program**. Transportation funding cannot be claimed if the **ECS operator** has not provided or arranged transportation or if no cost was incurred by the **ECS operator** to transport the children.
5. If the transportation of **children with disabilities/delays** is not done by the **ECS operator**, then a contract or signed agreement must be in place by October 31 with the company or person(s) transporting the children.
- REVISED 6. For parent-provided transportation, **school authorities** must have signed agreements/contracts in place and on file by October 31. The amount that a parent is reimbursed must take into consideration the transportation funding the authority receives for the child along with the cost of providing comparable service.
7. When a **child with a disability/delay** is transported by their **parent(s)**, the Parent-Provided ECS transportation rate will apply.
8. When a **child with a disability/delay** is transported by taxi or by a teacher aide ECS Special Transportation funding may be claimed only if the decision for transporting by taxi or by aide is based on medical or safety reasons or because there are no other transportation options. Otherwise, transportation by taxi or aide will be paid at the regular transportation funding rate.
9. To apply for ECS Special Transportation funding:
 - a) Private **ECS operators** are required to electronically submit their ECS Transportation funding application to the Financial Reporting and Accountability Branch by October 31. Please note that the electronic ECS transportation funding application can be used to claim both ECS Regular and ECS Special Transportation funding.
 - b) **School jurisdictions** are required to electronically submit their ECS Special Transportation funding application to the Business Operations and Stakeholder Support Branch by November 30.

Payment is made on the basis of the submitted information, Funding Allocation Criteria and Funding Rates.

10. For **ECS programs beginning in September**: transportation funding is based on **funded child** registration information as of the **September count date**.
11. For **ECS programs beginning after September 30**: the count date for transportation will be the last **operating day** in the month in which the program begins. The electronic ECS transportation claim form must be submitted to the Business Operations and Stakeholder Support Branch within three weeks of that count date.
12. **Children with disabilities/delays** who are registered after the **September count date** are not eligible for special transportation funding. Transportation costs for ECS **children with severe disabilities/ delays** eligible to receive PUF may be claimed as a Program Unit expense.
13. An **ECS operator** providing special transportation to and from an **ECS program** may charge the **parent** of a **funded child** a fee for the transportation service. The fee shall not exceed the total cost of the provision of ECS transportation services less the ECS Special Transportation funding received from Alberta Education.

14. **ECS operators** are required to maintain records of:

- a) names of children transported;
- b) number of days each individual child is transported;
- c) number of **family-oriented programming** sessions;
- d) copies of completed route risk assessment forms;
- e) actual costs of transportation; and
- f) special transportation provided.

Part 2 — Early Childhood Services (ECS) Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs

(Sections 2.1, 2.3, 2.4, 2.7 and 2.8 – see Table of Contents)

Section 2.2 — ECS Mild/Moderate Disabilities/Delays, Gifted and Talented Funding

ALLOCATION FORMULA

ECS Mild/Moderate, Gifted and Talented Allocation	=	# of funded children with mild/moderate disabilities/delays or who are gifted and talented	X	Mild/Moderate and Gifted and Talented Rate
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ALLOCATION CRITERIA

- Children with mild/moderate disabilities/delays** or those who are gifted and talented must be at least 3 years 6 months of age and less than 6 years of age on September 1.
- Coding
 - Code 30 mild/moderate disabilities/delays.
 - Code 80 gifted and talented.
 - Grants Code 500 must be used with both Code 30 and 80.

School authorities will use the *Special Education Coding Criteria* to determine the child's eligibility and proper coding.
- Children with mild/moderate disabilities/delays** or children who are gifted and talented and who are between the ages of 3 years 6 months but less than 4 years 6 months old on September 1, that are enrolled and identified after the **September count date** and are reported on the **March Count**, will be eligible for 50 per cent ECS Mild/Moderate or Gifted and Talented Funding and 50 per cent ECS Base Instruction Funding.

REFERENCES

[Guide to Education](#)

[Special Education Coding Criteria](#)

[Standards for the Provision of Early Childhood Special Education](#)

[ECS Fact Sheets](#)

See Part 9, section 9.1 – Reporting Requirements and Information, of this Manual.

Section 2.5 — ECS Plant Operations and Maintenance (POM)

ALLOCATION FORMULA

# of funded children	X	POM Rate for ECS
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ALLOCATION CRITERIA

1. This funding is based upon information as of the **September count date**. A **private ECS operator** is not required to apply for this funding.
2. **Children with a severe disability/delay** are funded at three times the POM Rate for ECS.

Section 2.6 — ECS Administration

REVISED

ALLOCATION FORMULA

Total ECS Funding	X	5.4%
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ALLOCATION CRITERIA

1. Funding for administration is based on 5.4 per cent of the total ECS funding a **private ECS operator** receives from Alberta Education for the following areas:
 - a) Base Instruction Funding;
 - b) Special Education Needs (including Mild/Moderate And Gifted And Talented, and Finalized Program Unit Funding);
 - c) Transportation (Special And Regular);
 - d) Plant Operations and Maintenance; and
 - e) English as a Second Language (ESL).

For ECS programs with Program Unit Funded (PUF) children, administration funding for **private ECS operators** will be adjusted based on the final PUF amount approved.

Part 3 — Funding For Accredited Funded Private Schools (Grades 1 to 12)

(Section 3.1 – Base Instruction, please refer to Section 1.2)

Section 3.2 — Designated Special Education Private Schools (DSEPS) Funding

ALLOCATION CRITERIA

1. Funding is provided for **students with mild/moderate or severe disabilities**, who are enrolled on the **September count date** and meet Alberta Education coding criteria as outlined in the *Special Education Coding Criteria*.
2. In order to receive the higher instructional funding rate, the **DSEPS** must advise **parents** of the need to discuss their **child's mild/moderate disability** and programming options with their **resident board** before enrolling in the **DSEPS**. The **resident board** must retain a record of the discussion.

Parents are required to consult with a **school** official of their **resident board** regarding their child's special education programming options. A **parent** consultation must involve all of the following:
 - a) a **school** official of the **resident board** (for example, the Principal or Special Education Coordinator) must review with the **parent(s)** the assessment that diagnosed their child with a mild/moderate disability;
 - b) the **resident board** must offer and explain to the **parent** what type of special educational program the **resident board** can provide for the student; and
 - c) if, after being advised of the special education program the **resident board** can provide, the **parent(s)** decides to enroll their child in a **DSEPS**, the **parent(s)** must notify the **resident board** that they are moving their child to a **DSEPS**.
3. One of the following types of documentation must be kept on file at the **DSEPS** to confirm the **parent** consultation:
 - a) a signed registration form at the **DSEPS** which contains a statement declaring that the **parent** consulted with their **resident board**; or
 - b) a signed letter from the **parent** attesting that they consulted with the **resident board**; or
 - c) a letter from the **resident board** official confirming that the **parent(s)** consulted with them about their child's special education needs programming needs.
4. **DSEPS** must notify each applicable **school board**, in writing, of the **board's resident students** who are registered at the **DSEPS**. This list should indicate:
 - a) which students' **parents** consulted with the **resident board** on the special education programming options for their **funded student** prior to enrolment at the **DSEPS**; and
 - b) which students are newly enrolled; and
 - c) which students are currently attending who were enrolled in previous years.
5. The **DSEPS** must submit a list of students to Director of School Finance by December 15 identifying students:
 - a) whose **parents** consulted with their **resident board** and attach documents referred to in #3
 - b) whose **parents** did not consult with the **resident board**.

6. Funding rates for **DSEPS**:
 - a) \$11,433.20 per student with a **mild/moderate disability** when the **parent** has consulted with the **resident school board**, (grant codes 110 and 500 and the applicable 50 code).
 - b) \$7,404.31 per student with a **mild/moderate disability** when **parent** enrolls student without consulting the **resident school board**, (grant code 500 and applicable 50 code).
 - c) \$7,404.31 per **student with a severe disability**, (grant code 500 and applicable 40 code).
7. Transfer of funding between jurisdictions and **DSEPS** is not required for students who move after the **September count date**.
8. An **accredited funded private school** wishing to become a **DSEPS** or a **DSEPS** wishing to add a new school site must submit a written request for approval by April 30 (of the prior school year) to the Inclusive Learning Supports Branch stating their reasons for doing so. They must also indicate this intention on their Notice of Intent.

REFERENCES

[Special Education Coding Criteria](#)

[Standards for Special Education](#)

See Part 9, section 9.1 Reporting Requirements and Information, in this Manual

Section 3.3 — Severe Disabilities Funding (Private Schools and Charter Schools)

ALLOCATION FORMULA UNDER REVIEW

# of approved students with severe disabilities	X	Severe Disability Funding Rate
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ALLOCATION CRITERIA

1. **Accredited funded private schools** and **charter schools** will use the severe disabilities categories and codes outlined in the *Special Education Coding Criteria*, and the *Handbook for the Identification and Review of Students with Severe Disabilities* to determine a student's eligibility and to properly code the student for funding purposes.
2. Severe Disability Funding will be based on approval of the student's eligibility by the Inclusive Learning Supports Branch and on enrolment data as of the **September count date**.
3. The eligibility of new students will be audited by the Inclusive Learning Supports Branch in the first year they are claimed for funding by the **accredited funded private school**, or the **charter school**. Once a student is approved for severe disabilities funding, auditing for eligibility by Alberta Education will occur no more than every three years unless otherwise required to maintain funding.
4. **Accredited funded private schools** providing an approved educational program in an **institution** may not claim severe disabilities funding for **students with severe disabilities** who are funded through **institution** program funding.
5. **Students with severe disabilities** enrolled in an **online program**, **blended program** or **home education** program are not eligible for severe disabilities funding.
6. Eligibility and approval of severe disabilities funding will be based on an audit of each student's file. Each information file must contain all of the following:
 - a) assessment and diagnosis by qualified personnel;
 - b) documentation/assessments of the student's current level of functioning in the learning environment;

- c) identification of the types of support and services being provided to **students with severe disabilities**. They must receive three or more of the **levels of support** to meet their educational needs;
 - d) a current **Individualized Program Plan (IPP)** based on *the Requirements for Special Education in Accredited Funded Private Schools*, which addresses the student's needs.
7. The following **students with severe disabilities** may be claimed on the **March count** and are eligible for 50 per cent of the Severe Disabilities Funding Rate:
- a) students who move from a **school jurisdiction or an institution**, after the **September count date** to an **accredited funded private school** (including **DSEPS**), or **charter school**;
 - b) students who were not registered with any **school authority** on the **September count date** and who register in an **accredited funded private school** or a **charter school** after the **September count date**.
8. Funding must be transferred from an **accredited funded private school** or a **charter school** on a pro-rated 10 month basis for **students with severe disabilities** who transfer after the **September count date** to either a **school jurisdiction** or a different **accredited funded private school** or a **charter school**.

REFERENCES

[Handbook for the Identification and Review of Students with Severe Disabilities](#)

[Special Education Coding Criteria](#)

[Requirements for Special Education in Accredited Funded Private Schools](#)

Section 3.4 — Early Literacy Funding

ALLOCATION FORMULA

# of Grades 1 and 2 funded students on September count date	X	Early Literacy Rate
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ALLOCATION CRITERIA

1. An **accredited funded private school** may receive Early Literacy Funding for programs provided for **funded students** in Grades 1 and 2.
2. In order to access funding, an **accredited funded private school** must indicate on the *Notice of Intent to Operate a Private School (NOI)*, that it plans to provide Early Literacy programs for Grades 1 and 2.
3. **Accredited funded private schools** may use Early Literacy Funding in the following ways:
 - a) minimum of 85 per cent to hire additional human resources to support classroom teachers in giving students at risk the additional programming and attention they need;
 - b) maximum of 15 per cent to purchase early literacy resources, or to provide in-service for **parents** and for teachers, or other staff as part of the **school's** Early Literacy program.
4. All students in Grades 1 and 2 who need early literacy assistance must have access to the program. **Accredited funded private schools** are required to keep on file the number of students served and their level of achievement.
5. If the program objectives have been met and not all the funding was utilized, the remainder of the funding may be utilized for other programs.
6. **Accredited funded private schools** will be required to report revenues and expenditures in their audited financial statements

REVISED

(Sections 3.5 to 3.9 — please refer to the Table of Contents)

Part 4 — Federal French Funding

Section 4.1 — Federal Francophone Education Funding (Francophone Regional Authorities)

ALLOCATION FORMULA

$$\# \text{ FTE Francophone funded children or students} \quad \times \quad \text{Funding Rate}$$

ALLOCATION CRITERIA

- Under an agreement between the Governments of Canada and Alberta, and according to section 10(1) of the *School Act*, **Francophone Regional Authorities** may receive federal funds for providing a **Francophone Education** for **funded students** in ECS to Grade 12.
- Francophone Regional Authorities** may also include as **funded students** under this section:
 - a **funded student** they have directed to attend College Mathieu in Gravelbourg, Saskatchewan; or
 - a student directed by **Francophone Regional Authority** to attend another **school jurisdiction** and registered by the jurisdiction.
- A **First Nations child/student who resides on a reserve** is not eligible for funding under this section.
- This funding for **Francophone Regional Authorities** is based on **funded student** enrolments as of the **count date** and the hours of French instruction for the **school year** for the reported students.

FTE Francophone student/child is one who has access to French instruction for a minimum of:

- 712 hours ECS to Grade 6/year.
 - 570 hours Grade 7 to 9/year.
 - 600 hours Grade 10 – 12/year.
- For students/children with access to less French instruction time than indicated in Criteria #4, the following formula must be used.

a) ECS to Grade 9	=	Funding Rate per FTE funded student	\times	$\left(\frac{\text{French Instructional Hours}}{950 \text{ hours per year}} \right)$	\times	# of funded students or ECS children in the program
b) Grades 10 to 12	=	Funding Rate per FTE funded student	\times	$\left(\frac{\text{French Instructional Hours}}{1000 \text{ hours per year}} \right)$	\times	# of funded students in the program

6. The following funding rates will be determined upon finalization of the Alberta-Canada Bilateral Agreement.

Program	Rate
Francophone Education ECS to Gr. 6	To be determined
Francophone Education Gr. 7 to 12	To be determined

Section 4.2 — Federal French Language Funding (School Authorities)

ALLOCATION CRITERIA

- Under an agreement between the Governments of Canada and Alberta, **school authorities** may receive federal funds for providing instruction in French for **funded children/students** in ECS to 12 in the following categories:
 - Alternative French Language Programs** (French programs offered under section 11(1) and 21(1) (a) of the *School Act*, including French Immersion); and
 - French as a Second Language (FSL)** courses (French programs offered under section 11 and 39 of the *School Act*).
- An individual who is a **First Nations student with status who resides on a reserve** is not eligible to be counted for funding under this section.
- To be counted as a **FTE funded child/student**, the minimum number of hours French instruction must be provided for are:
 - ECS – Grade 6: 712 hours;
 - Grades 7 – 9: 570 hours;
 - Grades 10 – 12: 600 hours.
- The minimum instructional hours in French for **Alternative French Language Programs** are:
 - ECS – 238 hours/year;
 - Grades 1-6 – 475 hours/year;
 - Grades 7-9 – 380 hours/year; and
 - Grades 10-12 – 250 hours/year.
- Grants code 211 must be used for students having access to the minimal instructional hours in French as outlined in #4; and
 - grants code 230 must be used for students having access to less than the minimum instructional hours in French as outlined in #4.
- The following funding rates will be determined upon finalization of the Alberta-Canada Bilateral Agreement.

PROGRAM	GRANT CODE	ESTIMATED RATE
Alternative French Language Program ECS to Grade 6	211	To be determined
Alternative French Language Program Grade 7 to 12	211	To be determined
FSL courses ECS to Grade 6/other courses*	230	To be determined
FSL courses Grade 7 to 12/other courses*	230	To be determined

*These estimated rates also applies to **funded children/students** taking courses in an **Alternative French Language Program** who receive less than the minimum number of instructional hours in French per year as outlined in Allocation Criteria #4.

7. For children/students with less French instructional hours than identified in #3, but at least the minimum hours identified in #4 use applicable rate and formula in #8 for Alternative French Language Program.

8. a) ECS to Grade 9

$$\text{Funding rate per FTE funded student} \times \frac{\text{Instructional hours per year}}{950 \text{ hours per year}} \times \left(\text{\# of funded students/funded children in the program} \right)$$

- b) Grades 10 to 12

$$\text{Funding rate per FTE funded student} \times \frac{\text{Instructional hours per year}}{1000 \text{ hours per year}} \times \left(\text{\# of funded students in the program} \right)$$

9. a) For children/students from ECS to Grade 9, with access to less French Instruction than identified in #4 use the applicable FSL Rate and formula in #8a;
 b) for students in grades 10 to 12, the access to instructional hours must be equal to or greater than 125 hours but less than 250 hours in order to access funding using the applicable FSL rate and formula in #8b.
10. A **school authority** offering an **Alternative French Language Program** may, by resolution, authorize the commencement of an **Alternative French Language Program** in a **school**; and upon passing the resolution shall inform the **Minister** in writing.
11. A **school authority** must develop, keep current and implement written policies and procedures consistent with provincial policies and procedures for:
- a) **Alternative French Language Programs** (such as French Immersion); and
- b) **FSL courses**.

Part 5 — Targeted Funding for Provincial Initiatives

NEW

Section 5.1 — Regional Collaborative Service Delivery (RCSD) Funding (School Authorities)

NEW

Regional Collaborative Service Delivery (RCSD) is intended to provide a regional model for support to schools and community partners to meet the needs of children and youth (ECS to Grade 12), as well as to families who have children and youth with complex needs (birth to 20). It is also intended to strengthen the capacity of service providers to collaboratively respond to those needs.

NEW

RCSD FUNDING MODEL

- The funding for this new model will come from blending the funding previously provided for Student Health Services and for Children and Youth with Complex needs (CYCN). The 2013/2014 school year is considered to be a transitional year as we transition to the new RCSD model.
- For this transitional year, the funding allocation for each region will be determined using the RCSD boundaries and the previous year's allocation methods for Student Health and CYCN. (See the 2012/2013 Funding Manual for School Authorities sections 5.1 and 5.6). These amounts will then be combined and allocated to each of the RCSD regions.
- The regional partners will then decide how this funding will be shared and allocated based on the identified needs and priorities for their region.

REVISED

ALLOCATION CRITERIA

1. RCSD funding is administered by Alberta Education in partnership with Alberta Health and Alberta Human Services.
2. RCSD funding must be pooled and shared by the RCSD Leadership Teams to support the identified needs of children and youth in the Region. Children and youth throughout the region must have equitable access to services regardless of their **school** program.
3. The RCSD funding allocation may only be accessed if, and when, the **school authority** joins a RCSD Leadership Team, and a Terms of Reference is submitted. A Strategic Plan is also required and must be signed by the Chair of the RCSD Leadership Team on behalf of all regional partners.
4. Decisions on how RCSD funding is to be utilized must be made jointly by the regional partners.
5. Alberta Education distributes RCSD funding through the “designated banker” **school board** identified by the Regional Team to administer the funds on behalf of all partners.
6. Every **school year**, the Regional Leadership Team must:
 - a) submit a Strategic Plan for approval by the RCSD Provincial Coordinator; and;
 - b) identify in the Strategic Plan, the **school board** that will act as the “designated banker” through which they will receive and distribute their funding; and

- c) submit an Annual Report for the previous **school year** by November 30, that includes a financial statement. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits.
- 7. Children and youth, who are registered with **school authorities** in alternative programs such as **home education/blended, outreach** and **online** and children and youth with complex needs (birth to age 20) are eligible for supports and services through Regional Collaborative Service Delivery.
- 8. Funding for administration costs is included in the allocation and is not to exceed 4.5 per cent of the total allocation.

NEW

Section 5.2 — Francophone Regional Collaborative Service Delivery (RCSD) Funding (Francophone Regional Authorities)

REVISED

ALLOCATION CRITERIA

- 1. Francophone RCSD funding and the services provided are for students identified in Section 5.1 and registered in francophone school programs.
- 2. Francophone RCSD funding is accessed by Le Réseau provincial d'adaptation scolaire.
- 3. Francophone Regional Collaborative Service Delivery funding is administered by Alberta Education in partnership with Alberta Health and Alberta Human Services.
- 4. Through Le Réseau, Francophone RCSD funding must be pooled and shared provincially by the **Francophone Regional Authorities**.
- 5. Francophone RCSD funding may only be accessed by a **Francophone Regional Authority** that is a member of Le Réseau and only once a Terms of Reference has been submitted along with a Strategic Plan signed by all member **school board** Chairs, including the Chair of Le Réseau's "designated banker" **school board**; and submitted and approved.
- 6. Alberta Education distributes Francophone RCSD funding to Le Réseau through the designated "banker" **school authority** to administer on behalf of all partners.
- 7. Every **school year**, Le Réseau must:
 - a) submit a Strategic Plan for approval by the RCSD Provincial Coordinator;
 - b) submit an Annual Report for the previous **school year** by November 30, that includes a financial statement. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits;
 - c) identify in the Strategic Plan, a **Francophone Regional Authority** that will act as a "designated banker" through which they will receive and distribute their funding.
- 8. The allocation of Francophone RCSD Funding to Le Réseau is based primarily on a per student amount.
- 9. Funding for administration costs is included in the allocation and is not to exceed 4.5 per cent of the total allocation.

Section 5.3 — SuperNet Service Funding (School Authorities)

ALLOCATION CRITERIA

1. **School authorities** will receive SuperNet Service funding for each approved site that is connected to and using the SuperNet services as the primary data network obtained through the SuperNet vendor, Axia SuperNet Ltd.

Examples of approved sites include **schools**, stand alone Outreach centres/schools, one **school authority** head office, and one network operation centre.

2. **School authorities** must sign a Letter of Agreement with Axia SuperNet Ltd. for all SuperNet connected sites.
3. **School authorities** must apply for SuperNet Service Funding by submitting a SuperNet Service Funding Application (Form 13AE5.4) to Alberta Education's School Technology Branch (STB) along with a copy of each Letter of Agreement, Schedule B and Attachment to Schedule B soon after the sites are connected to SuperNet services.
4. **School authorities** must provide notification to STB of any possible changes, including additions and/or deletions to the list of connected sites. Notification timelines are as follows:
 - a) one year for additions and moves;
 - b) within one month of site closure for a site disconnection.

If a school authority fails to notify the STB of a disconnection, the **school authority** will be responsible for the SuperNet costs incurred for the disconnected SuperNet site.

5. SuperNet Service Funding is provided on the basis of approved connected sites and the monthly service cost. The funding amount is determined by multiplying the number of eligible connected sites by the monthly SuperNet rate.
6. SuperNet Service funding is paid retroactively to the service activation date if the funding application is received by March 31 of the current **school year**. Funding applications received after March 31 are not eligible for retroactive funding.
7. SuperNet Service funding is calculated on a monthly basis and provided for each approved site as follows:
 - a) **school jurisdictions** and **Francophone Regional Authorities** \$800.00 (100 per cent);
 - b) level 1 **accredited funded private schools** \$480.00 (60 per cent);
 - c) level 2 **accredited funded private-schools** \$560.00 (70 per cent);
 - d) **Private ECS Operators** \$400.00 (50 per cent) (payment for connection after the 1st of the month will be pro-rated).

Note: SuperNet Service for First Nations schools are funded by Aboriginal Affairs and Northern Development Canada.

8. NETWORK HEAD-END PROVISION

Alberta Education will provide SuperNet Service Funding to a **school authority** network head-end location based on the following formula:

Head End SuperNet Service Funding Ratio = authority student population/average number of students per **school jurisdiction** (based on provincial student population counts at the end of each school year).

If the ratio is less than 1.4 then the **school jurisdiction** will receive \$800.00/ month. Authorities with a calculated Head-End Super Net Funding Ratio of 1.5 or greater will receive the ratio rounded to the next whole number multiplied by \$800.00/month.

9. MULTIPLE STAKEHOLDER SHARED FACILITY AGREEMENTS

When different education stakeholders are sharing the same facility and each has their own local-area network infrastructure, they are eligible to have one stakeholder (transferring stakeholder) transfer their SuperNet Service Funding Allocation to the other stakeholder (receiving stakeholder). This can allow one stakeholder to obtain additional services from SuperNet and provide them to both stakeholders. The procedures and considerations for this are as follows:

- a) the transferring stakeholder must have their own local area network in the shared site or they are not eligible to receive SuperNet Service Funding;
- b) the transferring stakeholder will sign a transfer document provided by the STS that is valid for one year. They must continue to provide a new, signed document for each subsequent year; and
- c) the total amount of monthly SuperNet Service Funds paid to the receiving stakeholder must not exceed the total monthly contracted value of SuperNet services provided to that stakeholder by Axia SuperNet Ltd.

10. EXISTING HIGH-SPEED NETWORKING INFRASTRUCTURE PROVISION

Some **school authorities** that own and operate their own fibre-optic high-speed network connections between eligible SuperNet connectable sites can claim SuperNet Service funding for these sites without an Axia SuperNet Ltd. contract for those sites given the following procedures and considerations:

- a) at least one site on the **school authority** owned network infrastructure must connect to SuperNet using an Axia SuperNet Ltd. contracted service;
- b) the total amount of monthly SuperNet Service funds paid to the **school authority** must not exceed their number of eligible SuperNet sites multiplied by the eligible dollar amount per site; nor can the total amount of monthly SuperNet Service Funding paid to the **school authority** exceed the total monthly contracted value of SuperNet services to them by Axia SuperNet Ltd.; and
- c) the **school authority** owned infrastructure used to connect the sites together must be single mode fibre equal to or better than that used by the SuperNet build (contact STB for details). Proof of the fibre used must be provided to the STB (installation invoice, purchase invoice, or third-party engineering validation).

REFERENCES

[Alberta SuperNet Eligibility Criteria](#)

Section 5.4 – Class Size Funding (School Jurisdictions)

- Class Size funding is a component of Base Instruction Funding for ECS, grades 1 to 3 and Tiers 2 and 3 of CEU funding. (See section 8.1 School Jurisdiction Funding Rates).
Note: although Class Size funding is allocated based on a specific grade level or for specific CTS courses, **school jurisdictions** will have the flexibility to use this funding to hire or retain teachers at any grade level based on local needs.
- **School jurisdictions** will continue to use the online reporting tool to consolidate their class size data and are required to post their **jurisdiction** and **school** class size averages on their website by January 15 of each school year.

Part 6 — Other Provincial Support Funding

Section 6.1 — Education Program in an Institution (EPI)

ALLOCATION CRITERIA

1. Funding is provided for:
 - a) education programs for **resident students of the government** who reside in an **institution** or **group home**;
 - b) **day students** who attend an EPI that is approved for **day students**.
2. **School authorities** must have approval from the Minister and a contract/agreement with Alberta Education to provide an education program to students in an **institution**.
3. Institutional Funding will only be provided for eligible **resident students of the government** and **day students** who:
 - a) are in the custody under the *Corrections Act*, the *Corrections and Conditional Release Act (Canada)*, the *Youth Criminal Justice Act (Canada)* or the *Youth Justice Act*, and deemed by the **school jurisdiction** and Alberta Solicitor General staff to be unlikely to succeed in any other **school jurisdiction** education programs; or
 - b) are in the custody of a regional Child and Family Services Authority (CFSA) director, or a Designated First Nations Agency (DFNA) Chief Executive Officer or have a guardian appointed under the *Child, Youth and Family Enhancement Act* and reside in a **group home** or treatment centre and receive intensive treatment; or
 - c) require long term intensive medical care which can only be provided onsite at the hospital; or
 - d) are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse.
4. **Institutional students with a severe disability** in an educational program provided by an **accredited funded private school** who have been placed in an **institution** by Alberta Health Services, the Alberta Solicitor General or the regional CFSA will be funded through Institutional Funding and are not eligible for Severe Disabilities Funding.
5. EPIs will be funded for a 10 month educational program unless their contract stipulates otherwise. Only secure EPIs (such as Young Offender Centres) will be funded for a 12 month education program. A secure facility is one where the student is detained in a locked-down facility (i.e. guarded and confined).
6. **School authorities** with a contract or approval to provide an EPI are required to:
 - a) ensure all eligible **institutional students** are registered with the grants code 550;
 - b) submit a budget of costs and revenues using Form 13AE6.1 to the School Accreditation and Dispute Resolutions Branch by May 31 for the following **school year**. EPIs are expected to stay within their approved budget;
 - c) submit a letter for approval to the School Accreditation and Disputes Resolution Branch explaining the need for additional funds when requesting a significant change to a proposed or an approved budget;
 - d) submit an application for actual program costs and revenues using Form 13AE6.1 to School Finance Branch by October 15 of the following **school year**;
 - e) ensure actual costs reflect significant increases or decreases in student enrolment;
 - f) keep daily attendance records for all students; and

- g) ensure that the EPI is of a comparable quality to other school programs provided by the **school authority** and is subject to the same level of planning, evaluating and reporting required by provincial and local policy.
- 7. For approval of a new EPI, contact School Accreditation and Disputes Resolution Branch. Documentation must be submitted by May 1 preceding the **school year** for which approval is being requested.
- 8. To maintain the confidentiality of students in Women's Shelter programs, **school authorities** are not required to submit a list of names or ASN's on the Final claim however, they should report any Base Funding for these students and report this revenue on budget and final cost forms.

Note: See also Part 9, section 9.1 – Reporting Requirements and Information.

Section 6.2 — Regional Educational Consulting Services

NEW

This funding and services provided will be transitioned to the new Regional Collaborative Service Delivery (RCS) model (see sections 5.1 and 5.2) at the end of the 2013/2014 school year.

ALLOCATION CRITERIA

1. **School authorities** may access Regional Educational Consulting Services (RECS) for **funded students/children** who require supports and services based their needs and who meet the criteria for one of the following special needs codes:
 - a) Code 41 – Severe Cognitive Disability
 - b) Code 43 – Severe Multiple Disability
 - c) Code 44 – Severe Physical or Medical Disability
 - d) Code 45 – Deafness
 - e) Code 46 – Blindness
 - f) Code 55 – Hearing Disability
 - g) Code 56 – Visual Disability.
2. Francophone **school authorities** may access RECS from Le Réseau provincial d'adaptation scolaire for all their **students with special education needs**.
3. Alberta Education determines the funding allocation for each RECS team based on provincial and regional needs.
4. The **school jurisdictions** designated by Alberta Education to provide regional educational consulting services (RECS) will provide consultation services, professional in-service, and assessment services to **school authorities**.
5. A rate of \$50 per hour will be charged for services provided by the RECS team to **school authorities**.
6. **School jurisdictions** designated to provide Regional Educational Consulting Services will be informed by letter from the School Finance Branch by May 31 of their funding allocation for the next **school year**.
7. Administration Funding is included in the allocation.
8. The **school jurisdictions** designated by Alberta Education to provide Regional Educational Consulting Services are:
 - a) Grande Prairie School District #2357;
 - b) Edmonton School District #7;
 - c) Calgary School District #19; and
 - d) Greater North Central Francophone Education Region No. 2 (for **Francophone Regional Authorities** only) – Le Réseau provincial d'adaptation scolaire.

Note: see Part 9, section 9.1 – Reporting Requirements and Information

Section 6.3 — Regional Consortium Funding

ALLOCATION FORMULA

1. Funding will be provided, to the seven established regional professional development consortia approved by the **Minister**, for the management and “infrastructure” of the consortium.
2. Alberta Education will provide infrastructure funding to a consortium’s agent **board** at the specified rates.
3. Each consortium shall provide services on a cost-recovery basis.

ALLOCATION CRITERIA

1. If the annual infrastructure expenses are less than the funding provided by Alberta Education, the consortium may transfer the surplus funds to the consortium program account. The consortium may utilize surplus funds for the delivery of professional development programs and services.
2. The consortium must ensure that it has sufficient funds in its Accumulated Surplus to cover any current year deficit.
3. Each consortium shall assign an agent **board** to provide financial services, including financial reporting, on behalf of the consortium.
4. The consortia shall submit to the School Research and Improvement Branch by December 31, an annual report that provides program details and results achieved.
5. The agent **board** will provide the consortium with the following documents: a Statement of Revenues and Expenses, a Statement of Financial Position, Schedule 1 – Conditional Grant Program Revenues, Schedule 2 – Transfers to Other Consortia and the Certification page. The consortia shall submit their statements to the School Finance Branch by December 31.

CONSORTIA NAMES	AGENT BOARD
Southern Alberta Professional Development Consortium	Lethbridge School District No. 51
Calgary Regional Consortium	Canadian Rockies Regional Division No. 12
Central Alberta Regional Consortium	Red Deer School District No. 104
Edmonton Regional Learning Consortium	St. Thomas Aquinas No. 38
East Central Regional Consortium (Learning Network Educational Services)	Lakeland RCSS District No. 150
Francophone Provincial Professional Development Consortium	Greater Southern Public Francophone Education Region No. 4
Northwest Regional Learning Consortium	Grande Prairie School District No. 2357

Section 6.4 — Debt Retirement (School Jurisdictions)

ALLOCATION CRITERIA

1. A public or separate **school jurisdiction** may receive Debt Retirement Funding if it has incurred, prior to April 1, 1995, debenture borrowings for: new construction, modernization, upgrading of **school** buildings, furniture and equipment, and other related costs approved by the School Buildings Board at that time.
2. Effective September 1, 1995, the province repays the debt owing on authorized **school building** projects.
3. Alberta Education does not provide Debt Retirement Funding to a public, separate or francophone **school jurisdiction** for:
 - a) any current capital costs or debt owing on administration buildings, garages, warehouses, busses, and teacherages unless that space has been authorized by Alberta Education for instructional use;
 - b) any unsupported debt incurred for **school building** projects because **school boards** did not use their capital building reserves on record in 1993 - 1994 and 1994 - 1995 **school** fiscal years for those projects;
 - c) any costs of current **school building** projects that exceed the budget set by Alberta Infrastructure; or
 - d) any unsupported costs of **school building** projects incurred by a **school board** after final project costs are established by Alberta Infrastructure and Alberta Education.
4. Interest shielding applies where a **school jurisdiction** borrowed from Alberta Capital Financing Authority (ACFA) on the security of a debenture for a **term** of 10 or more years. The **school jurisdiction** may be paid the amount of the debenture interest that:
 - a) applies to the unsupported portion of the debenture debt; and
 - b) is in excess of debenture interest calculated at the following rates:

% Rate	Debenture Issue Date
8	January 1, 1974 to April 30, 1980
9	May 1, 1980 to March 26, 1981
11	March 27, 1981 where the borrowing was approved by the Local Authorities Board (LAB), on or before March 30, 1982.
11	Where borrowing was approved by the LAB on or after March 31, 1982 and before March 28, 1983 and the expired portion of the debenture term does not exceed 5 years.

Where the debenture borrowing is approved by the LAB on or after March 28, 1983 there will be no interest shielding.

5. Interest shielding through payment for debenture interest on the unsupported portion of the principal is limited to compensation for interest rates up to 12 per cent inclusive.
6. The annual debenture debt, principal and interest, payments for **school buildings** are paid directly by Alberta Finance on behalf of the **school jurisdictions** to ACFA.
7. Interest shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

Section 6.5 — Fort McMurray Allowance (FMA)

ALLOCATION FORMULA

\$1,040 per month	X	# of eligible FTE employees
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ALLOCATION CRITERIA

1. This living allowance is only provided to the following **school jurisdictions** who have employees that live and work in the vicinity of Fort McMurray:
 - a) Fort McMurray Public School District No. 2833;
 - b) Fort McMurray Roman Catholic Separate School District No. 32;
 - c) Greater North Central Francophone Education Region No. 2 (Centre Communautaire Scolaire Boréal only); and
 - d) Northland School **Division** No. 61 (Fort McKay and Anzac Schools only).
2. Eligible **school jurisdictions** must distribute the FMA funding to the eligible employees only. This funding may not be used for other purposes.
3. Eligible **school jurisdictions** must provide eligible employee FTE information by submitting Form 13AE6.6 to the Director of School Finance by January 31 of the **school year**.
4. Payment of this funding will be based on the previous year employee FTE information until Form 13AE6.6 is received when payments will then be revised for the current school year.
5. Eligible **school jurisdictions** must include a letter from their auditor with the audited financial statements confirming the financial management of these funds.
6. The amount of the monthly allowance will be set annually by Treasury Board at the beginning of the fiscal year and is subject to change (i.e. it may be increased, decreased or discontinued) based on the housing cost differential in the Fort McMurray area.

Part 7 — Capital Funding

Section 7.1 — School Facilities (School Jurisdictions)

ALLOCATION CRITERIA

1. **School jurisdictions** may receive Capital Funding for projects approved by Alberta Education for new, additions and replacement schools, for modernization of existing school facilities, and for the construction, transportation, re-location and set up of modular classrooms and re-location of portable classrooms.
2. **School jurisdictions** must submit their Three Year Capital Plan by April 1. The Capital Plan should identify projects in order of priority with consideration given to:
 - a) leases;
 - b) new and replacement schools, and additions to school facilities;
 - c) modernization and upgrading of existing school facilities.
3. Modular classroom requirements and the relocation of modular or portable classrooms may be requested annually in November as part of the Modular Classroom Program.
4. Funds approved for specific capital projects may only be used for the specific project and may not be used for other projects without prior approval from the **Minister**.
5. **School jurisdictions** must utilize provincially supported school facilities (including P3 or design build capital projects) to provide educational services to Alberta students over the life of the asset. If the use of these assets changes, please refer to the Guidelines for the Audited Financial Statements for the accounting treatment.
6. **School jurisdictions** must follow the *Disposition of Property Regulation (Alberta Regulation 181/2010)* for any supported asset designated as surplus.

REFERENCES

[School Capital Manual](#)

[Disposition of Property Regulation](#)

Section 7.2 — Infrastructure Maintenance and Renewal (IMR) – School Jurisdictions

ALLOCATION FORMULA

1. The IMR Funding formula is based on the following components:
 - a) 50 per cent enrolment;
 - b) 24 per cent age of the building;
 - c) 24 per cent eligible school space;
 - d) 2 per cent for non-refundable GST and other factors.

2. The enrolment number for IMR is based on the **FTE weighted enrolment** taken from the **Frozen Funded Head Count** of the previous year. On-line students (code 620) are counted at 0.1 FTE for the purpose of this grant.

ALLOCATION CRITERIA

1. IMR funding may only be used for the purpose for which it is intended.
2. **School jurisdictions** may use the funding to:
 - a) ensure school facilities meet all regulatory requirements, particularly as they pertain to providing a safe and healthy learning environment.
 - b) Preserve and improve the quality of the learning environment by:
 - i. replacing building components that have failed;
 - ii. prolonging the life of the school facility through planned, proactive replacement of major components;
 - iii. upgrading of the educational areas to meet program requirements.
 - c) meet the requirements of **children/students with disabilities/delays**.
 - d) replace or upgrade building components to improve energy conservation and efficiency to achieve cost savings as a result.
3. **School jurisdictions** will be advised of their allocation amount by email from the School Finance Branch. The IMR Grant Calculation Sheets are available on the Extranet under School Finance.

REVISED

REFERENCES

[School Capital Manual](#)

Part 8 — Payments to School Authorities

Section 8.1 School Jurisdiction Funding Rates

School Jurisdiction Funding Rates		2012/2013	2013/2014
NEW	For 2013/2014, Class size and Inclusive Education funding rates increase by 2.00%. All other funding rates including Base Instruction remain the same as for 2012/2013. AISI funding is suspended and Fuel Price Contingency, and LRCA, are discontinued.		
REVISED	Base Instruction Funding		
	ECS (per funded child)		
	ECS Base Instruction Rate	\$3,280.84	\$3,280.84
	ECS Class Size Base Rate	<u>\$ 716.95</u>	<u>\$ 731.29</u>
	ECS Basic Child Grant	\$3,997.79	\$4,012.13
REVISED	Grades 1 to 3 (per funded student)		
	Grades 1 to 3 Base Instruction Rate	\$6,561.68	\$6,561.68
	Grades 1 to 3 Class Size Base Rate	<u>\$1,433.91</u>	<u>\$1,462.59</u>
	Grades 1 to 3 Basic Student Grant	\$7,995.59	\$8,024.27
	Grades 4 to 6 Base Instruction Rate (per funded student)	\$6,561.68	\$6,561.68
	Grades 7 to 9 Base Instruction Rate (per funded student)	\$6,561.68	\$6,561.68
	Grades 10 to 12 (per CEU to a maximum of 60 CEUs per year per funded student)		
	See section 9.1, CEU Funding Tiers list		
	Tier 1 CEU Rate	\$187.48	\$187.48
	Tier 2 CEU Rate (includes \$12.33 per CEU Class Size rate)	\$199.57	\$199.81
	Tier 3 CEU Rate (includes \$34.77 per CEU Class Size rate)	\$221.57	\$222.25
	Tier 4 CEU Rate (Work Experience and Special Projects)	NA	\$112.48
	ADLC course CEUs funded at 44% of the Tier Rate		
	High School Base Rate = 35 Tier 1 CEUs (codes 500,550 & 640)	\$6,561.68	\$6,561.68
	ECS Program Unit Funding (PUF)		
	Maximum per eligible funded child	\$25,051.20	\$25,051.20
	Maximum for each additional funded child in a unit	\$6,215.88	\$6,215.88
	Education Program in an Institution (see section 6.1)	net cost of program for eligible students	
	English as a Second Language (per eligible FTE funded child/student)	\$1,178.10	\$1,178.10

School Jurisdiction Funding Rates	2012/2013	2013/2014
Equity of Opportunity (see section 1.14)	per formula	per formula
First Nations, Métis and Inuit Education (per eligible FTE funded child/student)	\$1,178.10	\$1,178.10
Francisation (per eligible FTE funded child/student)	\$1,178.10	\$1,178.10
Francophone Equivalency Access (per eligible funded student)	\$624.24	\$624.24
Francophone Regional Collaborative Service Delivery (see section 5.2)	per formula	
Home Education (per eligible funded student) + 50% of the cost of ADLC courses for Gr. 7-12 to a maximum of: + additional funding for Grades 1 - 6 ADLC courses (section 1.3)	\$1,641.27 \$1,641.27 per formula	\$1,641.27 \$1,641.27 per formula
Hutterite Colony Schools (per colony school)	\$11,541.30	\$11,541.30
Inclusive Education (see section 1.10)	per formula	per formula
Northern Allowance Lower Zone (per FTE funded enrolment) Intermediate Zone (per FTE funded enrolment) Upper Zone (per FTE funded enrolment)	\$471.24 \$705.84 \$1,060.80	\$471.24 \$705.84 \$1,060.80
Outreach : Amount per approved Outreach program	\$62,972.76	\$62,972.76
Plant Operations & Maintenance (see section 1.17) Gr. K-6 (per FTE funded child/student) per formula Gr. 7-9 (per FTE funded student) per formula Gr. 10-12 (per FTE funded student) per formula	\$795.30 \$751.18 \$755.38	\$795.30 \$751.18 \$755.38
Regional Collaborative Service Delivery (replaces Student Health and CYCN funding)	per formula	per formula
Regional Consortium (per consortium)	\$191,987	\$191,987
Regional Educational Consulting Services (see section 6.2)	per approved allocation	
Small Board Administration Charter School (per school) (see section 1.13) School jurisdiction FTE funded enrolment < 2000 School jurisdiction FTE funded enrolment > 2000 but < 3000	per formula \$470,825.88 sliding scale reducing to zero	\$470,825.88

School Jurisdiction Funding Rates						2012/2013	2013/2014
Small Schools by Necessity: Base Allocation							
Schools with ≤ 150 FTE funded children/students						\$88,281.00	\$88,281.00
Schools with > 150 but < 226 FTE funded children/students						sliding scale reducing to zero	
Small Schools by Necessity: Variable Allocation							
School Type	Peak Enrolment		Enrolment Limit				
K – 3	40		80			\$588.54	\$588.54
K – 6	80		150			\$1,650.36	\$1,650.36
K – 9	80		220			\$1,884.96	\$1,884.96
K – 12	80		290			\$2,943.72	\$2,943.72
Socio-Economic Status (per eligible FTE funded child/student)						\$471.24	\$471.24
SuperNet Services (max. per month per approved site)						\$800.00	\$800.00
Transportation Funding:							
1. Urban Transportation							
10,000-29,999 population (per eligible passenger/eligible transported ECS child)						\$507	\$507
30,000-49,999 population (per eligible passenger/eligible transported ECS child)						\$487	\$487
50,000 + population (per eligible passenger/transported child)						\$466	\$466
Distance (km)	2.4 - 6.0	6.01 - 10	10.01 - 14	14.01 - 18	18.01 - 26	26.01 - 38	> 38
Rate per Km	\$10.58	\$15.48	\$18.52	\$21.30	\$26.12	\$28.56	\$31.45
Parent-provided ECS Transportation (including children with a disability/delay)						\$549	\$549
ECS Special Transportation (per round trip per child with a disability/delay -max. of 185 trips)						\$18.24	\$18.24
Special Transportation (per eligible student with a disability)						\$3,374	\$3,374
Weekend Transportation (per eligible funded student)						\$4,743	\$4,743
Boarding Transportation (per eligible funded student)						\$4,263	\$4,263
Inter-school Transportation (per km for two-way distance between schools for eligible programs)						\$1.09	\$1.09
2. Metro Urban Transportation							
Regular Transportation (per expected eligible passenger)						\$549	\$549
Parent-provided ECS Transportation (including children with a disability/delay)						\$549	\$549
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)						\$18.24	\$18.24
Special Transportation (per funded student based on severe profile)						\$3,374	\$3,374

School Jurisdictions Funding Rates							2012/2013	2013/2014					
3. Urban Francophone Transportation													
10,000-19,999 population (per eligible passenger/eligible transported ECS child)							\$642	\$642					
20,000-29,999 population (per eligible passenger/eligible transported ECS child)							\$595	\$595					
30,000 + population (per eligible passenger/eligible transported ECS child)							\$549	\$549					
Parent-provided ECS Transportation (including children with a disability/delay)							\$549	\$549					
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)							\$18.24	\$18.24					
Special Transportation (per eligible funded student with a disability)							\$3,374	\$3,374					
Weekend Transportation (per eligible funded student)							\$4,743	\$4,743					
Boarding Transportation(per eligible funded student)							\$4,263	\$4,263					
Inter-school Transportation (per km for two-way distance between schools for eligible programs)							\$1.09	\$1.09					
4. Rural Transportation													
Regular Transportation (per eligible passenger/ eligible transported ECS child) (see section 1.20)						Per formula based on grid below							
Rural Transportation Rate													
Density of Effective Transportation Service Area													
Weighted Passengers	0-.29	.30-.35	.36-.57	.58-.76	.77-.95	.96- 1.14	1.15-1.30	1.31-1.45	1.46- 3.01	3.02+			
0-700	\$682	\$779	\$847	\$863	\$872	\$940	\$1086	\$1259	\$1767	\$2030			
701 – 1400	\$682	\$752	\$836	\$853	\$866	\$930	\$1064	\$1135	\$1418	\$1886			
1401 – 2100	\$682	\$744	\$831	\$847	\$856	\$872	\$1056	\$1121	\$1371	\$1824			
2101 – 2800	\$682	\$705	\$819	\$834	\$851	\$869	\$973	\$1115	\$1221	\$1738			
2801 – 3500	\$682	\$701	\$803	\$822	\$836	\$862	\$911	\$1025	\$1178	\$1382			
3501 – 4200	\$682	\$693	\$741	\$810	\$824	\$859	\$903	\$1000	\$1080	\$1270			
4201 – 4900	\$675	\$682	\$725	\$745	\$812	\$853	\$896	\$941	\$1004	\$1164			
4901 – 5600	\$675	\$675	\$683	\$730	\$755	\$830	\$856	\$905	\$965	\$1063			
5601 – 6300	\$675	\$675	\$675	\$693	\$735	\$765	\$845	\$876	\$931	\$1000			
6301 +	\$675	\$675	\$675	\$675	\$693	\$746	\$768	\$857	\$893	\$952			
Distance (km)	2.4 - 6		6.01 - 10		10.01 - 14		14.01 - 18		18.01 - 26		26.01 - 38		> 38
Rate per Km	\$10.58		\$15.48		\$18.52		\$21.30		\$26.12		\$28.56		\$31.45
Parent-provided ECS Transportation (including children with a disability/delay)								\$549		\$549			
ECS Special Transportation (per round trip per child with a disability/delay - max. of 185 trips)								\$18.24		\$18.24			
Special Transportation (per eligible funded student with a disability)								\$6,748		\$6,748			
Weekend Transportation (per eligible funded student)								\$4,743		\$4,743			
Boarding Transportation (per eligible funded student)								\$4,263		\$4,263			
Inter-School Transportation (per km for two-way distance between schools for eligible programs)								\$1.09		\$1.09			

Section 8.2 — Private ECS Operators Funding Rates

ECS Funding for Private ECS Operators and Accredited Funded Private Schools with ECS Programs				2012/2013	2013/2014
NEW	For 2013/2014, funding rates remain the same as for 2012/2013 except Equity of Opportunity and ECS Administration funding which have decreased. Funding for AISI is suspended.				
REVISED	ECS Administration (See section 2.6)			6% of ECS funding	5.4% of ECS funding
	ECS Base Instruction Funding (per funded child)			\$3,280.84	\$3,280.84
	ECS Regular Transportation (per eligible transported child) Also Parent-provided ECS Transportation (including children with a disability/delay)			\$549.00	\$549.00
	ECS Special Transportation (per round trip per child with a disability/delay - max of 185 trips)			\$18.24	\$18.24
	English as a Second Language (ESL) (per eligible funded child)			\$589.05	\$589.05
REVISED	Equity of Opportunity (per funded child) (see section 1.14)			\$78.00	\$50.50
	Mild/Moderate Disabilities/Delays, Gifted and Talented (per eligible funded child)			\$2,486.76	\$2,486.76
	Plant Operations and Maintenance (per funded child)			\$397.66	\$397.66
	Program Unit Funding				
	Maximum per eligible funded child			\$25,051.20	\$25,051.20
	Maximum for each additional funded child in a unit			\$6,215.88	\$6,215.88
	SuperNet Service Funding (maximum per month per approved site)			\$400.00	\$400.00

Section 8.3 — Accredited Funded Private Schools

NEW

NEW

NEW

REVISED

Accredited-Funded Private Schools Funding		Level 1* 2013/2014	Level 2* 2013/2014
For 2013/2014, funding rates remain the same as for 2012/2013 –except Equity of Opportunity funding is decreased. Plant Operations and Maintenance and LRCA funding are discontinued. AISI funding is suspended.			
Base Instruction Funding			
Grades 1 – 9 (per funded student)		\$3,937.01	\$4,593.18
Grades 10 – 12 (per Tier 1CEU - max of 60 CEUs/year per funded student)		\$112.49	\$131.23
Grades 10 – 12 (per Tier 4 CEU - for Work Experience and Special Projects)		\$67.49	\$78.74
CEUs for ADLC courses are funded at 44% of the respective Tier rate above.			
Designated Special Education Private Schools (DSEPS)			
Funding rate for students with a mild or moderate disability whose parents consulted with their resident school board prior to placement in the DSEPS (coded as 110).		\$11,433.20	\$11,433.20
Funding rate for students with a mild or moderate disability whose parents did not consult with their resident school board prior to placement in the DSEPS (do not code as 110). This is also the funding rate for students with severe disabilities in DSEPS (not including severe disabilities funding).		\$7,404.31	\$7,404.31
Early Literacy (per funded student in Grades 1 and 2)		\$159.63	\$159.63
Education Program in an Institution (see section 6.1)		net cost of program	
English as a Second Language (ESL) (per eligible FTE funded student)		\$706.86	\$824.67
Equity of Opportunity (per FTE funded student) (see section 1.14)		\$60.60	\$70.70
First Nations, Métis, and Inuit (per eligible FTE funded student)		N/A	\$824.67
Home Education (per eligible funded student)		\$1,641.27	\$1,641.27
Plus 50% of the cost of ADL courses for Grades 7-12 to a maximum of:		\$1,641.27	\$1,641.27
Plus additional funding for Grades 1-6 ADL courses. (See section 1.3)		per formula	
Northern Allowance			
(per FTE Funded Student)			
Lower Zone		N/A	\$329.87
Intermediate Zone		N/A	\$494.09
Upper Zone		N/A	\$742.56
Severe Disabilities Funding (per eligible funded student)		\$16,465	\$16,465
SuperNet Service Funding (maximum per month per approved site)		\$480.00	\$560.00

*per Accountability and Declaration Funding Form, 13AE3.0

Note: For ECS funding rates see section 8.2.

Payment Schedules

Section 8.4 — School Jurisdictions

PART 1 – School Jurisdiction Funding

Sections 1.1 to 1.13, 1.15 to 1.25, 6.1, 6.2, and 6.5

School jurisdictions receive their funding allocation from the Alberta School Foundation Fund, the General Revenue Fund, and in the case of opted out separate **school jurisdictions**, the supplementary **school** tax requisition.

Alberta School Foundation Fund (ASFF)

ASFF payments will be made to **school jurisdictions** in monthly installments.

Opted-out **boards** will receive a monthly advance on their ASFF payment from Alberta Education and on their local education property tax requisition entitlement. These **school boards** are required to re-pay the advance on their local education property tax requisition by the last banking day in the months of March, June, September and December. Interest will be applied to overdue accounts at the same rate charged to municipalities. Opted-out **boards** will continue to collect education property tax requisition revenue from their municipalities each quarter.

Payments

Funding will be allocated on a monthly basis at 8.33 per cent per month; with the exception of January and August, which will be at 8.35 per cent and the month of March. An initial payment of 5 per cent will be processed in early March and an additional payment will be made by March 31. If this additional payment does not equal 3.33 per cent, then the difference will be either deducted/added prior to the end of the current **school year**, based on the prior approval of the Assistant Deputy Minister, Strategic Services.

Payment Receipt Dates

Sep. 16, 2013	Jan. 15, 2014	Apr. 15, 2014	Aug. 15, 2014
Oct. 15, 2013	Feb. 18, 2014	May 15, 2014	
Nov. 15, 2013	Mar. 7, 2014	Jun. 16, 2014	
Dec. 16, 2013	Mar. 31, 2014	Jul. 15, 2014	

- Advances will be calculated using the most recent information on **funded children/students**, other statistics such as **CEU** estimates, and the current year rates.
- Adjustments to payments based on estimates will be made when Alberta Education receives actual enrolment data.
- In all cases, when funding is adjusted during the school year, the payment system will determine the amount owing to date, the advances previously paid, and the balance owing to adjust the allocation to the correct amount.

PART 1 – School Jurisdiction Funding

Section 1.14 – Equity of Opportunity

September to March	⇔ 14.28% monthly
June	⇔ Payment based on enrolment adjustments less previous payments

PART 4 – Federal French Funding

Section 4.1 – Federal Francophone Education

Section 4.2 – Federal French Language

On approval of allocations

⇔ 100%

PART 5 – Targeted Funding for Provincial Initiatives

Section 5.1 – Regional Collaborative Service Delivery (RCSD) Funding

Section 5.2 – Francophone RCSD Funding

September or upon approval of Service Plan

⇔ 58.33% advance

March/April

⇔ 100% less previous payment

Section 5.4 – SuperNet Service Funding

September or upon approval of application

⇔ 58.33% advance

April or upon approval of application

⇔ 100% less previous payments

PART 6 – Other Provincial Support

Section 6.3 – Regional Consortium Funding

September

⇔ 70%

March/April*

⇔ 100% less previous payment

*Payment is contingent upon receipt of the previous year's Statement of Revenues and Expenses.

Section 6.4 – Debt Retirement

Supported debenture payments are made directly to the Alberta Capital Finance Authority on behalf of the school jurisdiction.

PART 7 – Capital Funding

Section 7.1 – School Facilities

⇔ Upon approval of funding.

Section 7.2 – Infrastructure Maintenance and Renewal (IMR)

September

⇔ 50%

By April 30

⇔ 100% less previous payment. See section 9 for IMR reporting Requirements.

REVISED

Section 8.5 – Private ECS Operators

PART 2 – Early Childhood Services (ECS) Funding

The funding provided by Alberta Education to **private ECS operators** is allocated according to the schedules below - provided all conditions have been met. Payments to **private ECS operators** will be received in the last week of the month (based on electronic deposit). With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90 per cent less previous payment. The **Minister** may authorize an alternate payment schedule for a **school authority** where deemed necessary. Note: the Notice of Intent (NOI) must be received before the first payment is made.

REVISED

Sections 2.1, 2.2, 2.5, and 2.6

September*	⇔ 40% advance based on lesser of previous year enrolment, reported enrolment or NOI enrolment.
	⇔ New private ECS operators will receive a 40% advance based on enrolments entered into PASI.
January**	⇔ 70% based on current year enrolments less previous payment.
April	⇔ 100% based on current year enrolments less previous payments.

*Any ECS program with 13 or more mild to moderate children in the prior school year will receive an advance of mild to moderate funding per above.

**All ECS programs with mild to moderate, and gifted and talented, children will receive mild/moderate funding based on their current year enrolment count.

Section 2.3 – Program Unit Funding (PUF)

September – Designated Special Education ECS programs.	⇔ 40% advance based on the previous year's approved PUF budget amount.
Regular ECS programs –upon approval of a written request to School Finance Branch	⇔ Up to a 30% advance based on lesser of previous year PUF budget or a current year estimate based on number of pre-approved PUF children.
Upon receipt of the PUF application	⇔ 40% less any previous payments
January	⇔ 70% less previous payments
April	⇔ 80% less previous payments
June	⇔ 90% less previous payments
Upon approval of actual PUF costs	⇔ Lesser of approved PUF budget amount or actual costs, less previous payments

Section 2.4 – ECS English as a Second Language

January	⇔ 70% based on current year enrolments
April	⇔ 100% less previous payments

Section 2.7 – ECS Transportation

Payment is based on receipt and approval of a transportation application.

January	⇔ 70% advance based on transportation claim
April	⇔ 100% less previous payment

Section 2.8 – Equity of Opportunity

September	⇔ 40% advance based on lesser of previous year enrolment, reported enrolment or NOI enrolment.
January	⇔ 70% based on actual current year enrolments less previous payment.
March	⇔ 100% based on actual current year enrolments less previous payments.
June	⇔ Payment based on enrolment adjustments less previous payments.

PART 4 – Federal French Funding

Section 4.2 – Federal French Language

Payment is based on approval of allocations	⇔ 100%
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PART 5 – Targeted Funding for Provincial Initiatives

Section 5.3 – SuperNet Service Funding

September or upon approval of application	⇔ Pro-rated basis to March 31
April or upon approval of application	⇔ Pro-rated basis to August 31

Section 8.6 — Accredited Funded Private Schools

PART 3 – Accredited Funded Private Schools Funding

The funding provided by Alberta Education to **accredited-funded private schools** is allocated according to the schedules below provided all conditions have been met. With the approval of the Assistant Deputy Minister, Strategic Services, a March payment may be made up to 90 per cent less previous payment. The **Minister** may authorize an alternate payment schedule for a **school authority** where deemed necessary.

Note: the Notice of Intent (NOI) must be received before the first payment is made.

Grades 1 – 12 Sections, 3.1 to 3.5, 3.7, and 3.8

Advance payments will be made based on enrolment estimates.

Payments made in January or later will be based on current actual enrolments.

September (Gr. 1-12)	⇔ 40% advance based lesser of previous year enrolment/CEUs, reported enrolment or NOI enrolment.
January (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔ 58.33% based on current year enrolments/CEUs less previous payments.
March (Gr. 1-12)	⇔ 70% based on current year enrolments/CEUs less previous payments.
April (Gr. 10-12)	⇔ 70% based on current year CEUs less previous payments.
April (Gr. 1-9) and DSEPS (Gr. 1-12)	⇔ 100% based on current year enrolments/CEUs less previous payments.
August (Gr. 10-12)	⇔ 100% based on current year CEUs and enrolment adjustments less previous payments.

Grades 1 – 9 Section 3.6 – ESL Funding

January	⇔ 58.33% based on current year enrolments.
March	⇔ 70% based on current year enrolments less previous payments.
April	⇔ 100% based on current year enrolments less previous payments.

Section 3.10 – Equity of Opportunity

September	⇔ 40% based on lesser of previous year enrolments, reported enrolment or NOI enrolments.
January	⇔ 70% based on current year enrolments less previous payments.
March	⇔ 100% based on current year enrolments less previous payments.
June	⇔ Payment based on enrolment adjustments less previous payments.

PART 4 – Federal French Funding**Section 4.2 – Federal French Language**

Based on approval of allocations	⇔ 100%
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PART 5 – Targeted Funding for Provincial Priorities**Section 5.4 – SuperNet Service Funding**

September or upon approval of application	⇔ Pro-rated basis to March 31
April or upon approval of application	⇔ Pro-rated basis to August 31

PART 6 – Other Provincial Support**Section 6.1 – Education Program in an Institution (EPI)**

September	⇔ 40% based on an approved budget.
January	⇔ 70% based on an approved budget less previous payment.
April	⇔ 90% less previous payments.
On approval of final costs	⇔ 100% of actual costs less previous payments.

Section 8.7 — Enrolment Counts

PURPOSE

Enrolment counts are used to determine funding allocations for **school jurisdictions**, **accredited funded private schools** and **private ECS operators** and are based on information submitted to PASI and Student Records Branch.

CONDITIONS

1. All ECS children and all students in Grades 1 to 12 who are enrolled and attending a **school** on the **September count date** of the **school year** will be counted at the **school** they are attending on that date. Enrolment records must be kept on file in the **school authority** or **school** that will substantiate the **September count date** ECS child/student enrolment data submitted to PASI and Student Records Branch. Students and ECS children enrolled after the **September count date** will not be counted for funding purposes.
2. A **school authority** may count a student who was not physically in attendance on the **September count date** if the student was enrolled and in attendance either in the month of September of the current school year or in the last week of June of the previous school year; and
 - a) who returned to **school** within 15 calendar days of the **September count date**; or
 - b) who was referred to the attendance board (with a letter on file);
 - c) unless #7 in this section applies.
3. A **school authority** may count a student who was physically in attendance at an **Institution** on the **September count date** if the student was enrolled and in attendance with the **school authority** prior to the **September count date** and returned to the **school** within 30 calendar days after the **September count date**. In the event that a priority school conflict occurs, and if the requirements of this condition are met, the decision will be made in favor of the **school authority**.
4. A **funded child/student** who was not physically in attendance in any **school authority** on the **September count date** but was in attendance in a **school authority** prior to the **September count date**, and then changed to a different **school authority**, may be claimed by the receiving **school authority** if the **funded child/student** was enrolled and in attendance within five calendar days of the **September count date**.
5. **Funded children/students** who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **associate board** or **associate accredited funded private school** where the student is enrolled on the **September count date**.
6. **School jurisdictions** or **funded private schools** offering year round education to **funded students** in Grades 1 to 9 will use **September count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.
7. A priority **school** conflict (PSC) occurs when more than one **school** claims the **funded child/student** on the **September count date**. In the situation that more than one **school** is claiming the same **funded child/student** for funding purposes, the priority **school** is the **school** in which a **funded child/student** is deemed to have been enrolled and in attendance on the **September count date**.
8. Priority **school** conflicts must be resolved before a **school authority** is entitled to receive funding for a **funded child/student**. When priority **school** conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.
9. If **school authorities** cannot resolve a priority **school** conflict, they should forward supporting documentation as follows to the School Finance Branch by May 15 for resolution. If School Finance must resolve the conflict, only Base Instruction Funding will be provided.

For Grades ECS to 9

- a) Attendance Sheets for the months of September and October are required, along with any documentation indicating (if applicable) the date of the **funded child's/student's** last day of attending **school** and registration forms for new children/students.
- b) In the event of a PSC involving a PUF child, the decision will be in favor of the **school authority** that submitted the PUF application - only if they are providing the child's ECS instruction. If the PSC involves an **ECS operator** who is providing the PUF child's ECS instruction and another **ECS operator** who is providing the PUF child's services and supports, the decision will be in favor of the **ECS operator** that is providing the ECS instruction.
- c) If more than one **school authority** substantiates enrolment and attendance on the **September count date**, the PSC will be resolved in favor of the authority that provided the most programming.
- d) If a **funded child** is enrolled in two ECS programs at two different **school authorities** (i.e. one in the morning and the other in the afternoon) and attendance on the **September count date** can be substantiated at both, funding will be allocated at 50 per cent to each **ECS operator**.

For Grades 10 to 12:

- a) Instructional minutes for the first **term** (September to January) are required. These minutes shall be based on the actual attendance of the **funded student** in all the courses that they were registered in the **school** during the first term. Note: Do not factor in second **term** class time.
- b) In resolving priority school conflicts, School Finance will determine the priority **school** as follows:
 - i. The **school** where the **funded student** was enrolled, and in attendance, on the **September count date**;
 - ii. If the **funded student** was enrolled, and in attendance, in two or more **school authorities** on the **September count date**:
 - The **school** delivering the majority of instructional minutes in the first **term** of the current **school year** would be deemed the priority **school**; or
 - In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50 per cent of the Base Instruction rate applicable to each **school authority**.

These minutes should be based on the actual attendance of the **funded student** in all the courses that they were registered in the school during the first term. Do not default to total class time offered.

10. Course Conflicts (Grades 10 –12)

A course conflict occurs when a regular senior high student has a **school** awarded mark reported by two **schools** in the same course, in the same semester and in the same **school year**. The **school** that delivered the most instructional minutes will be deemed the priority **school**.

Course conflicts must be resolved online in the Funding Event System (FES). The **school** must indicate the number of actual instructional minutes delivered to the student. These minutes should be based on the total class time offered minus any class time absent. Do not default to total class time offered.

REVISED

Part 9 — Reporting Requirements and Additional Information

Section 9.1 — Reporting Requirements and Information

Accredited Funded Private Schools

REVISED

1. An **accredited funded private school** must have a minimum of seven or more full-time equivalent (FTE) students enrolled from two or more families on the **September Count Date** who continue to be enrolled in **school**. This requirement applies for the first year of operation when the school is unfunded as well as to the years when they are funded. If the above requirement is not met in the first year, they will have to repeat another year of unfunded operations. The seven or more FTE students must not include ECS children or students enrolled in home education programs or the percentage of a student's time for the home education portion of a **blended program**. If enrolment drops below seven full-time equivalent students or if enrolment does not come from two or more families, the **accredited-funded private school** must notify the Provincial Coordinator of Private Schools in the School Accreditation and Disputes Resolution Branch.
2. An **accredited funded private school** accredited through the School Accreditation and Disputes Resolution Branch and approved by the **Minister** will be required to provide instruction to students for a minimum of one year before it is eligible for funding unless otherwise approved by the **Minister**.

Level 1 – the accountabilities ascribed to this accredited funded private school authority will continue to be those used by Alberta Education during the 2007/2008 school year and eligible funding allocations will be at the level 1 funding rates (60%) as outlined in this manual.

Level 2 – the accountabilities ascribed to this accredited funded private school authority will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will be at level 2 funding rates (70%) as outlined in this manual.

3. An **accredited funded private school** must keep in force a blanket fidelity bond with respect to all employees and board members in an amount acceptable to the **Minister**. That amount shall be \$50,000 or the amount of the accumulated surplus plus 40 per cent of Alberta Education funding for the program year, whichever is less. Agents may refer to this as a commercial blanket bond.
4. New **accredited funded private schools** are required to provide a Certificate of Incorporation for a society incorporated under the *Societies Act* or a non-profit company registered under Part 9 of the *Companies Act* or a non-profit corporation incorporated under an act of the Legislature.
5. **Accredited funded private schools** must provide an updated enrolment estimate, as of the first week of September for the new school year to their School Finance Funding Administrator by the end of the first week of September. Failure to do so will result in no September payment.

Base Instruction Funding

1. All enrolment information must be submitted through PASI and Student Records.
2. Base Instruction Funding is based on:
 - a) Student registration information in ECS and Grades 1 to 9 as of the **September count date** that is submitted to PASI and Student Records by October 3;
 - b) Course completion information for students in Grades 10 to 12 as follows:
 - i. Student Information System for specific enrolment; and
 - ii. Student Records System/Course Information Database System (CIDS) for course marks.
3. The ages of all **funded students** and **funded children** must be determined as of September 1.

Note: **schools** are required to maintain and retain student records pursuant to the *Student Record Regulation* for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for student work in the course and records of course withdrawal for students in Grades 10 to 12.

Adjustments to enrolment data:

- a) if an adjustment is required to the enrolment data reported to PASI and Student Records on the **September count date**, **school authorities** must ensure that changes are made through PASI.
- b) after receiving the December payment, any modification that will impact funding must be submitted through PASI by April 15.
4. Base Funding for **funded students** attending **school** in another province will be based on:
 - a) an **Education Services Agreement**; and
 - b) a letter submitted to School Finance indicating the student's name, birth date and grade and Alberta Student Number (ASN).
5. **School jurisdictions** must submit colony **schools** student registration information as of the **September count date** to PASI and Student Records.
6. HIGH SCHOOL
 - a) Funding is provided to students in senior high who take a junior high course for 125 hours ; the equivalent of 5 CEUs will be funded for each course completed (Form 13AE1.2a).
 - b) To receive 35 **CEUs** of Base Instruction Funding for high school **refugee students** (code 640), **school jurisdictions** must have documents on file from Citizenship and Immigration Canada that substantiate their refugee status.

CEU Funding Tiers

REVISED

CEU funding is provided according to the following Tiers of courses and based on the funding rates provided in sections 8.1, 8.2, and 8.3. All academic courses including Locally Developed Courses, Knowledge and Employability Courses, Registered Apprenticeship Program Courses, and Language Courses are funded at the Tier 1 rate. CTS courses are funded per the rates in Tiers 1, 2 and 3. Work Experience and Special Projects courses are funded at the Tier 4 rate. Since funding for Tiers 2 and 3 includes Class Size Funding, these Tiers only apply to **school jurisdictions**.

Accredited funded private schools offering Tier 2 and 3 courses will be funded at the Tier 1 rate for these courses.

NEW

Courses taken through the Alberta Distance Learning Centre (ADLC) are funded at 44% of the respective Tier rate.

Tier 1 Courses: CTS course codes with the following prefixes:	
Course Prefix	Tier 1 CTS Occupational Areas funded at \$187.48 per CEU
CTR	Career Transitions
ENT	Enterprise and Innovation
ENS	Environmental Stewardship
FIN	Financial Management
HCS	Health Care Services
HSS	Human and Social Services
INF	Information Processing
LGS	Legal Studies
LOG	Logistics
MAM	Management and Marketing
PRS	Primary Resources
TOU	Tourism
Tier 2 Courses: CTS course codes that begin with the following prefixes:	
Course Prefix	Tier 2 CTS Occupational Areas funded at \$199.57 per CEU
AGR	Agriculture
CSE	Computing Science
DES	Design Studies
EST	Esthetics
FAS	Fashion Studies
FOR	Forestry
REC	Recreation Leadership
WLD	Wildlife
Tier 3 Courses: CTS course codes that begin with the following prefixes:	
Course Prefix	Tier 3 CTS Occupational Areas funded at \$221.57 per CEU
ASA	Auto Service Tech Apprenticeship
COM	Communication Technology
CCS	Community Care Services
CON	Construction
CKA	Cook Apprenticeship
CRA	Carpenter Apprenticeship
COS	Cosmetology
ELT	Electro-Technologies
FAB	Fabrication
FOD	Foods
HSA	Hairstylist Apprenticeship
MEC	Mechanics
NET	Networking
WDA	Welder Apprenticeship
Tier 4 Courses: Work Experience and Special Projects courses:	
Course Prefix	Tier 4 courses funded at \$112.48 per CEU
OTH	Work Experience
OTH	Special Projects

NEW

Charter Schools

A **charter board** who is intending to cease the operation of a **charter school** or transfer its operation to a **school board** must receive approval from the **Minister** and conclude operations in accordance with the terms of the charter and *The Charter Schools Regulation*.

Funding may be advanced on a one-time basis to any newly approved **charter board**. The board of the newly approved **charter school** must apply in writing to the Director of School Finance by July 1 of the year preceding opening of the **charter school** and include a Budget Report Form to support the request.

Designated Special Education Private Schools (DSEPS)

The status of approved **DSEPS** may be reviewed and withdrawn at any time by Alberta Education.

Duplicate Course Marks

When a course has been submitted more than once for the same student with the same mark by the same school but with different end dates, the first course submission will be funded, however, any subsequent submissions of the same course will be considered an error and will not be funded. In order to substantiate that a duplicate course is eligible for funding, the following documentation must be submitted to the School Finance Branch for both marks submitted:

- Attendance records
- Record of marks for each assignment, test etc. and the weighting of these items.

Early Childhood Services (ECS)

1. **Children with mild/moderate disabilities/delays** must be coded with a code 30 and **funded children** who are gifted and talented must be coded with a code 80. **School jurisdictions** must also include the grants code 500 on the electronic registration file or Alberta Education Student Registration Form to receive this funding.
2. **Funded children** who were enrolled in an **ECS program** with an **ECS operator** on the **September count date** but were assessed and identified as having severe, mild or moderate disabilities/delays or as gifted and talented after the **September count date**, the **ECS operator** must modify the enrolment in PASI. The data must be submitted by April 15 to receive funding.
3. For **ECS programs** commencing after the **September count date**, the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three days of that day to PASI.
4. **ECS programs** commencing after the **September count date** must also submit a letter to the Director of the School Finance Branch indicating that they are a late starting program, the start date of the program, and a list of all ECS children enrolled with their Alberta Student Numbers (ASN's). This information must be submitted to the School Finance Branch by November 30.
5. Lehra-Leut Hutterite children are eligible for pro-rated ECS funding based on an application by the **school jurisdiction** to the Zone Services Director.
6. **Private ECS operators** must do an updated enrolment estimate as of the end of the first week of September of the current school year on the form provided. This form must be submitted to their School Finance Funding Administrator by end of the second week of September. Failure to do so will result in no September payment.

Education Program in an Institution (EPI)

INSTRUCTIONS FOR EPI FUNDING APPLICATIONS

Two categories of EPI:

1. Regular EPI only have eligible **resident students of the government** and **day students**
2. Mixed EPI have:
 - a) **resident students of the government**; and/or
 - b) **day students**; and
 - c) non-eligible students placed in an EPI by:
 - i. a **school authority**;
 - ii. a province other than Alberta or a territory; and/or
 - iii. attend as a **day student** in an EPI that is not approved for **day students**.

ALLOWABLE COSTS

1. Instructional Salary Costs
 - a) Certified Salaries & Benefits: teacher/school administration salaries and benefits.
 - b) Uncertified Salaries & Benefits: teacher assistants and office staff.
 - c) Substitute Teacher(s): costs for substitute teachers when teachers or teacher assistants are not in school.
2. Supplies and Services Costs
 - a) Professional Development: staff training, conferences, and in-services.
 - b) Educational Supplies: materials and resources which students/teachers require for the educational program, such as textbooks, notebooks, CDs, DVDs, pens and pencils.
 - c) Educational Services: costs for educational or psychological assessments directly related to providing the educational programs.

 Note: Counselling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.
 - d) Office Supplies: materials for the administration of the school program such as paper, pens, binders, files.

 Note: Office capital equipment such copiers, furniture, fixtures for the classroom or office are not to be included in this category as these costs are the responsibility of Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.
3. Technology Costs are based on the lesser of:
 - a) \$500 x the average number of **institutional students** to a maximum of:
 - 21 to 50 students = \$20,000
 - 51 to 100 students = \$40,000
 - Over 100 students = \$50,000
 Mixed programs calculate costs based on **institutional students** only, (line D of the budget form) or;
 - b) actual costs not exceeding the above formula.

REVENUES:

Please list:

1. Expected Base Instruction revenues for **institutional students** enrolled on the **September count date**.
2. Other expected revenue for **institutional students** not including EPI funding payments.

AVERAGE NUMBER OF STUDENTS ENROLLED:

Step 1:	The Sum of the # of students enrolled each month divided by the # of months the program operated.
Step 2:	Add the enrolments for each month to get an annual total.
Step 3:	Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

AVERAGE NUMBER OF INSTITUTIONAL STUDENTS ENROLLED: (MIXED PROGRAMS ONLY)

Use same formula as above but exclude the non-eligible students who are enrolled.

English as a Second Language (ESL)

1. Student registration information for ECS to Grade 12 as of the **September count date** of the current **school year** must be submitted to the PASI and Student Records Branch. This registration must include Canadian-born (code 303), Foreign-born (code 301) and unfunded (code 302) English Language Learners. This coding of English language learners is required for **school authorities** to receive funding.
2. Student registration for ECS to Grade 12 as of the **March count date** for ESL Canadian-born (code 303) and Foreign-born (code 301), (excluding unfunded code 302) must be submitted to the PASI and Student Records Branch.

First Nations

For **funded students** attending First Nations schools, Base Instruction Funding is based on student information provided on Form 13AE1.2b.

Francophone

1. Francophone school authorities must submit student registration information as of the **September count date** to the PASI and Student Records Branch by October 3.
2. Student registration information for ECS to Grade 12 as of the **September count date** of the current **school year**. This registration will include Canadian-born (code 306) and Foreign-born (code 307) **Francisation** students. This coding of **Francisation** students is required for **Francophone Regional Authorities** to receive funding.
3. Student registration for ECS to Grade 12, **Francisation** Canadian-born and Foreign-born, as of the **March count date** must be submitted to PASI and Student Records.

Home Education

1. Home Education Funding is based on:
 - a) student registration information in Grades 1 to 12 as of the **September count date** that is submitted to PASI and Student Records;
 - b) the application for reimbursement of ADL course costs for **home education students** in Grades 7 to 12 enrolled in courses at the ADLC (Form 13AE1.3a); and
 - c) the application for additional ADL course costs for **home education students** in Grades 1 to 6 on enrolled in courses at the ADLC (Form 13AE1.3b).

Infrastructure Maintenance and Renewal (IMR)

1. IMR projects for upgrading building components to meet health and safety standards, to replace failed facility components, or to meet municipal requirements, whose costs exceed \$1 million, will require ministerial approval. IMR projects less than \$1 million, do not require ministerial approval.
2. Program modernization projects in excess of \$250,000 will require ministerial approval.
3. All projects over \$200,000 must be tendered through a competitive bidding process as per the *School Building and Tendering Regulation 383/88*. Projects over \$250,000 must also follow the process outlined in the *Agreement on Internal Trade*.
4. A Statement of Actual Expenditures for the previous school year for IMR projects must be submitted to the Capital Planning Branch by December 31. If this statement is not received, it may affect payment of the second funding installment prior to April 30.

Locally Developed Courses

School authorities offering senior high school locally developed, acquired, or acquired/adapted courses must be granted the use of a course code by Alberta Education to receive the relevant CEU Funding. Course codes are provided to **school authorities** for a specified term, for each senior high locally developed course that has been locally authorized through a board motion and meets Alberta Education requirements and submission deadlines.

School authorities shall forward all completed authorizations and course outlines of credit courses (including second language courses) to the Director of the Cross Curriculum Infusion Branch by May 31 for implementation in the first semester of the following **school year**, or by December 31 for implementation in the second semester of the same **school year**.

Outreach Programs

Where an **outreach program** ceases to operate, the **board** must immediately notify the respective Zone Services Branch Director. Where the **outreach program** is operating as a **school** and the **school** is closing, the **board** must notify the **Minister** of the **school** closure as per the *Closure of School Regulation AR 238/1997*, as amended.

Program Unit Funding (PUF)

1. A PUF application must be submitted to Alberta Education by November 30. **School authorities** shall apply using the electronic PUF application in the Program Unit Funding System (PUFS). Small **private ECS operators** with fewer than 5 children may apply for Program Unit Funding using the paper application form (Form 13AE1.5a).
2. PUF Expenses Rules (PUF Budget Page):
 - a) Instructional Salaries and Wages: special education consultation costs typically range from \$1,000 to \$1,500 per child. Classroom teacher costs are not eligible PUF costs. Base Instruction funding is provided for classroom teacher costs.

- b) Supplies and Materials: costs typically range from \$200 to \$400 per child with a maximum of \$500 per child. The maximum of \$500 per child is only allowed under exceptional circumstances and should be discussed with the Early Learning Branch.
 - c) Parent In-service: cost typically range from \$100 to \$300 per child with a maximum allowed of \$400 per child.
 - d) Staff In-service: costs typically range from \$200 to \$400 per child with a maximum allowed of \$500 per child.
 - e) PUF Transportation Revenues must match the amounts claimed on the Transportation grant application.
 - f) Program Coordination Costs – school jurisdictions only. These costs typically range from \$900 to \$1,500 per child.
 - g) Designated Special Education ECS Operators: may claim classroom teacher costs.
 - h) Private Designated Sp. Ed. ECS programs may claim reasonable costs for Facility and Administration expenses in the 8% to 12% range.
3. Revisions/changes to the original PUF application can be made in PUFS or for small **private ECS operators**, who submitted a paper PUF application, please use Form 13AE1.5c. The deadline for the submission of changes to a PUF application is March 1.
- A child, who is identified as having a severe disability/delay after the **September Count Date**, may be added to the PUF application up to the March 1 deadline. If a PUF child was in attendance before the **September Count Date** but was not identified as having a severe disability/delay until after the count date, the appropriate special needs code must be added/changed in PASI, to receive Base Instruction Funding.
4. **School jurisdictions** must report actual expenditures for PUF children using Form 13AE1.5b which are due October 31.
5. **Private ECS operators** must report actual expenditures for PUF children in the Audited Financial Statements, which are due November 30.

Reciprocal Exchange Programs

School authorities with a **resident student** participating in a **reciprocal exchange program** must submit a Reciprocal Student Exchange Approval Form in order to qualify for funding. The form can be found at:

http://www.education.alberta.ca/media/1179534/application%20for%20approval%20form_updatedjan2010.pdf. The form must be submitted by September 30 of the year the student is away on the exchange.

The instructions for completion of the form can be found at:

<http://www.education.alberta.ca/media/1179546/reciprocal%20student%20exchange%20form%20instructions.pdf>.

Note: the form is not required for students participating in the Alberta International Educational Exchange Program.

Regional Educational Consulting Services (RECS)

1. The **school jurisdictions** designated to provide Regional Educational Consulting Services will submit a budget (Form 13AE6.2) to the School Finance Branch by June 30, indicating projected expenditures and revenues for the services for the upcoming **school year**. **School jurisdictions** will be allowed to retain any surpluses to help offset future expenses or deficits. The budgeted expenditures shall not exceed the total revenues projected, including any surplus funds from previous years. Alberta Education will not fund any deficits.
2. **School jurisdictions** designated to provide Regional Educational Consulting Services will submit a financial statement of the actual revenues and expenditures on Form 13AE6.2 with the required schedules on or before November 30 of each year for the previous **school year**.

For referral information in the following zones, contact:

ZONE 1 – C.A.S.E.

(Coordinated Assessment Services for the Exceptional)
 Crystal Park School
 9315 – 116 Avenue
 Grande Prairie, Alberta T8V 6L5
 Phone: (780) 539-0333 Fax: (780) 539-7613
 E-mail: cbrown@gpsd.ab.ca

ZONES 2, 3 and 4 – Edmonton Regional Educational Consulting Services

Edmonton School Public Schools
 Newton School
 5523 – 122 Avenue
 Edmonton, Alberta T5W 1S3
 Phone: (780) 472-4455 Fax: (780) 478-7037
 E-mail: colleen.mcclure@epsb.ca

ZONES 4, 5 and 6 – REACH Services

(Regional Educational Assessment and Consultation Services)
 Emily Follensbee School
 5139 – 14 Street SW
 Calgary, Alberta T2T 3W5
 Phone: (403) 777-6983 Fax: (403) 777-6997
 E-mail: ddmorgan@cbe.ab.ca

Services for Francophone Authorities

Le Réseau provincial d'adaptation scolaire
 #20, 9040 – 84 Avenue
 Edmonton, Alberta T6C 1E4
 Phone: (780) 487-3200 Fax: (780) 490-7577
 E-mail: sgareaukubicki@csrqn.ab.ca

Special Needs

1. For **student with special needs** who are directed by their resident **school jurisdiction** to another **school jurisdiction** under an **educational services agreement**:
 - a) the providing **school jurisdiction** will register the student using code 140 with the code 500, the appropriate special needs code, and the resident **school jurisdiction's school authority** code;
 - b) the code 140 ensures the student is included in the resident **school jurisdiction's September count date** headcount and all related funding is provided by Alberta Education to the resident **school jurisdiction**. This ensures that the **resident school board** maintains responsibility for the student. No funding is provided by Alberta Education to the providing **school jurisdiction**. Payment for a student's program is the responsibility of the resident **school jurisdiction**;
 - c) the 140 code can only be used by **school jurisdictions** and cannot be used with students coded as 110, 600, or 610.
2. A **Designated Special Education Private School** shall report all students enrolled in the **school** on the **September count date** to PASI and Student Records by the submission date.

Transportation

Payment is made on the basis of information reported on the Rural and Urban Transportation claims submitted to Business Operations and Stakeholder Support Branch by November 30.

1. Only **funded students** enrolled on the **September count date** are eligible for this funding.
2. For parent-provided transportation, **school authorities** must have signed agreements/contracts in place and on file by October 31.

Section 9.2 — Alberta Education Contact List

While Alberta Education has made every effort to make the Manual clear and understandable, **school authorities** may require further information. To contact Alberta Education, please refer to the following list of contacts. For calls outside of Edmonton, dial 310-0000 then dial the area code and the number of the contact.

BRANCH	CONTACT	PHONE #
School Finance	Daimen Tan	(780) 422-0865
	Leona Badke	(780) 427-2750
	Mark Lalumiere	(780) 422-6550
Budget and Fiscal Analysis	George Lee	(780) 415-8325
Business Operations and Stakeholder Support (BOSS)	Jeff Willan	(780) 422-0930
Strategic Capital Planning	Pat Cox	(780) 415-5854
Capital Planning Branch North Region	Michael Ediger	(780) 427-2083
Capital Planning Branch South Region	Avi Habinski	(780) 427-2272
Cross Ministry Services	Marni Pearce	(780) 422-5045
Early Learning	Dianne McConnell	(780) 427-1199
Field Services		
Zone 1	Terry Wendel	(780) 427-5393
Zones 2 & 3	Randy Clarke	(780) 427-5382
Zone 4	Doug Coffin	(780) 427-0929
Zone 5	Randy Clarke	(780) 427-5382
Zone 6	Ron Taylor	(403) 297-5021
School Accreditation and Disputes Resolution	Sandra Shepitka-Boyle	(780) 422-2821
Financial Reporting and Accountability (FRA)	Brian Smith	(780) 415-9355
First Nations, Metis, and Inuit Services	Linda Pelly	(780) 427-5411
Official Languages Education Programs	Vivian Abboud	(780) 427-5538
Inclusive Learning Supports	Joyce Clayton	(780) 422-6551
International Education Services	Waldemar Riemer	(780) 422-1540
PASI and Student Records	Help Desk	(780) 427-5318
School Research and Improvement	Alfred Sakyi	(780) 422-8556
School Technology Branch	Derek McCurdy	(780) 415-8995

Any of the individuals above may be contacted by email by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., mark.lalumiere@gov.ab.ca). The exception to this rule is Ron Taylor who can be contacted by email respectively at RTaylor@gov.ab.ca.

The 2013/2014 Funding Manual for School Authorities is available for viewing and printing on Alberta Education's Web site at <http://www.Education.gov.ab.ca/funding/FundingManual/>.

Unless otherwise indicated, funding application forms should be submitted as an email attachment to the School Finance Branch at edc.schoolfinance@gov.ab.ca, or by mail to:

Alberta Education
 School Finance Branch
 8th Floor, Commerce Place,
 10155 – 102 Street
 Edmonton, AB T5J 4L5
 780-427-2055
 FAX: (780) 427-2147

Section 9.3 — References

All References are hyperlinked and can be accessed through the online version of the 2013/2014 *Funding Manual for School Authorities*: <http://education.alberta.ca/fundingmanual.aspx>.

[Aboriginal Learner Data Collection Initiative](#) (ALDCI)

[ALDCI Information for School Authorities](#)

[Alberta Education Programs of Study](#)

[Alberta SuperNet](#)

[Charter Schools Handbook](#)

[Charter Schools Regulation -212/2002](#)

[Children and Youth with Complex Needs Factsheet](#)

[Early Childhood Services Regulation — Alberta Regulation 31/2002 School Act](#)

[ECS Fact Sheets](#)

[English as a Second Language \(ESL\)](#)

[ESL Proficiency Benchmarks K-12](#)

[ESL Fact Sheet](#)

[Francisation - Foire aux questions](#)

[Francisation Proficiency Benchmarks](#)

[Funding for Early Learners: ESL/Francisation](#)

[Guide for Accredited Funded Private School Education Planning and Results Reporting](#)

[Guide to Education](#)

[Guide for Educational Planning and Results Reporting- Requirements for Alberta School Jurisdictions \(Public, Separate and Francophone School Authorities\) and Their Schools](#)

[Guide for Educational Planning and Results Reporting- Requirements for Alberta Charter School Authority Three-Year Plans](#)

[Handbook for the Identification and Review of Students with Severe Disabilities](#)

[Home Education Regulation 145/2006](#)

[Home Education Regulation Notification Form](#)

[Kindergarten Program Statement](#)

[Outreach Programs Handbook](#)

[Policy Framework for Services for Children and Youth with Complex Needs and Their Families](#)

[Requirements for Special Education in Accredited Funded Private Schools](#)

[School Capital Manual](#)

[Special Education Coding Criteria](#)

[Standards for Special Education](#)

[Standards for the Provision of Early Childhood Special Education](#)

[Student Record Regulation 225/2006](#)

[Student Health Partnership Service Plan Guidelines](#)

[The First Nations, Métis and Inuit Education Policy Framework](#)

Section 9.4 — Ceasing of Operations by a Private ECS Operator

POLICY

When funding has been provided by Alberta Education to a **private ECS operator**, and they cease operations, any surplus funds shall be returned to the Government of Alberta or transferred to another approved **ECS operator**.

CONDITIONS

1. The decision to cease operations must have been reached at a general meeting of the society governing the **private ECS operator** called within the provision of the society's or company's bylaws or articles of association.
2. If a **private ECS operator** decides to cease operations, the operator may determine if another **ECS operator** is willing to take over the program. The other **ECS operator** must agree to take over the program and to accept the transfer of assets and liabilities, including supplies, capital assets, and operating surpluses.
3. If a **private ECS operator** does not transfer its assets to another **ECS operator**, Alberta Education will calculate the amount of surplus (if any) from operations to be returned to the Government of Alberta.

PROCEDURES

1. When the **private ECS operator** has made a decision to cease operations, a letter must be sent to the School Accreditation and Disputes Resolution Branch notifying them of their decision. The letter must also include a copy of the board resolution to cease operations made at a duly called meeting of the society or company.
2. When the **private ECS operator** has agreed to allow another **ECS operator** to take over the program, both parties must sign an agreement for the transfer of the **private ECS operator's** assets and liabilities to the other **ECS operator**. The agreement should also include an inventory schedule of all assets/liabilities to be transferred and signed by officials of the **ECS operator** accepting the transfer. The **private ECS operator** must submit the agreement to the School Accreditation and Disputes Resolution Branch, Alberta Education within 90 days of the signing of the agreement but not later than November 30 following the school year that operations ceased.
3. The **private ECS operator** must prepare an Audited Financial Statement (AFS) for the final year of operation or portion thereof and submit it to the Financial Reporting and Accountability Branch, Alberta Education by November 30 following the **school year** that operations ceased.
4. If a **private ECS operator** ceases operations during the **school year**, unexpended fees paid by **parents** for the year, should be returned to the **parents**.
5. When the **private ECS operator** ceases operation but does not transfer the assets and liabilities to another **ECS operator**, the final AFS will be reviewed and the accumulated surplus, if any, will be pro-rated by Alberta Education. The portion of the surplus to be returned to Alberta Education will be calculated on the ratio of Alberta Education's contribution to the total revenue of the **ECS program** over the final three years of operation. The amount payable to Alberta Education will be communicated by letter from the Director of the School Finance Branch.
6. A **private ECS operator**, who ceases operations and does not enter into an agreement with another **ECS operator**, should sell their assets or make arrangements with Alberta Education to transfer the capital assets and supplies to another **ECS operator** or program provider in their area.

Section 9.5 — Government Organization Act

- 13 (1) A **Minister** may make grants if:
- (a) the **Minister** is authorized to do so by regulations under this section; and
 - (b) there is authority available in a supply vote for the purpose for which the grant is to be made.
- (2) The Lieutenant Governor in Council may make regulations applicable to a **Minister**:
- (a) authorizing the **Minister** to make grants;
 - (b) respecting the purposes for which grants may be made;
 - (c) governing applications for grants;
 - (d) respecting the persons or organizations or classes of persons or organizations eligible for grants;
 - (e) respecting the conditions required to be met by any applicant for a grant to render that person or organization eligible for the grant;
 - (f) empowering the **Minister** in particular circumstances to waive eligibility criteria prescribed under clause (d) or (e);
 - (g) respecting the conditions on which a grant is made and requiring the repayment of the grant to the Government if the conditions are not met;
 - (h) providing for the payment of a grant in a lump sum or by installments and prescribing the time or times when the lump sum or the installments may be paid;
 - (i) authorizing the **Minister** to make deductions from a grant and prescribing the circumstances under which the deductions may be made;
 - (j) limiting the amount of a grant or class of grant;
 - (k) authorizing the **Minister** to delegate in writing to any employee of the Government any power conferred or duty imposed on the **Minister** by this section or the regulations;
 - (l) requiring a person or organization receiving a grant to account for the way in which the grant is spent in whole or in part;
 - (m) authorizing the **Minister** to enter into an agreement with respect to any matter relating to the payment of a grant.
- (3) A regulation made under subsection (2) may be specific or general in its application.
- (4) Despite subsection (2)(g), the **Minister** may impose further conditions not prescribed in the regulations on the making of a particular grant.

Section 9.6 — Withdrawal of Teacher Services or Lockout

POLICY

Alberta Education recognizes the obligation of a **school board** and its teachers to negotiate contractual arrangements that are acceptable to both parties. In the event that negotiations break down and a strike by teachers or a lockout by a **board** occurs, Alberta Education will adjust funding, while keeping the educational needs of the students a priority. In the event of a strike by teachers or a lockout by a **school board** where educational services are not provided, the funding payable to a **board** shall be reduced. This adjustment of funds prevents a financial benefit from accruing to a **board**.

CONDITIONS

1. The **Minister** may reduce funding provided under the Alberta School Foundation Fund and/or the General Revenue Fund for the period for which cessation of teaching services occurred.
2. Funding will be reduced by 1/200th of the total annual certificated teacher salary and benefit amounts, based on the previous **school year** AFS, excluding central office exempt staff, for each **operating day** teachers are on strike or lockout.
3. The number of **operating days** used in the funding adjustment will reflect any instructional days, teacher preparation days and in-service/convention days that occurred during the strike or lockout.
4. **Boards** are required to ensure that students in Grades 2 to 9 have access to 950 hours of instruction per year and that students in Grades 10 to 12 have access to 1,000 hours of instruction per year. The access to instruction hours can be met in various ways.
5. Depending on the length of the strike or lockout, **boards** may choose to provide make-up instruction days lost, to meet the access to instruction hours required. **Boards** will be funded based on the same 1/200th calculation identified in Condition #2 above, for each day made up.
6. All other funding to **school jurisdictions** will continue in order to provide **boards** with the necessary flexibility to make local operating decisions.
7. There should be sufficient funds and flexibility within a **board's** current funding allocation to cover any costs of providing **distance** education materials to students during the cessation. No additional funding will be provided for these costs.
8. A **board** may make an application to the Director of the School Finance Branch for additional expenses incurred as a result of the labour disruption, other than for **distance** education materials, which were required to ensure the instructional hours are not compromised.
9. A **board** shall notify Alberta Education, immediately following the end of a strike or lockout, of the period and number of days of the cessation of services.
10. In the event that a strike by teachers or a lockout by a **board** occurs on the **September count date**, an alternate **count date** will be determined by the Director of School Finance.
11. Alberta Education will provide the **board** with a detailed calculation of the funding reduction.
12. After the strike or lockout, the funding reduction amount will be recovered from the next applicable payment(s) to the **board**.
13. In the event of a dispute over the amount of funding reduction and/or the amount claimed in additional expenses or make up days, a **board** may submit its concern(s) in writing to the **Minister**.

FUNDING APPLICATION DEADLINES and OTHER IMPORTANT DEADLINES

FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
13AEDSA	Delegation of Signing Authority Form	October 31, 2013	SF
13AE1.2a	Junior High Courses taken by Senior High Students (School Jurisdictions and Private Schools)	Upon Completion of Term/Course	SF
13AE1.2b	Funded Students Attending First Nations Schools	April 15, 2014	SF
13AE1.2c	Declaration of Management for 2012/2013	January 31, 2014	SF
13AE1.3a	Application for Reimbursement of ADL Course Costs for Home Education Students in Grades 7 to 12.	May 31, 2014	SF
13AE1.3b	Funding Application for Additional ADL Course Costs for Home Education Students in Grades 1 to 6	May 31, 2014	SF
13AE1.5a	ECS Program Unit Funding Application	November 30, 2013	SF
13AE1.5b	ECS PUF Statement of Actual Expenditures	October 31, 2013	SF
13AE1.5c	PUF Application Adjustments Form	March 1, 2014	SF
Electronic Submission	Application Form - Rural Transportation	November 30, 2013	BOSS
	Application Form - Special Transportation and Boarding	November 30, 2013	BOSS
	Application Form - Urban Transportation	November 30, 2013	BOSS
Electronic Submission	Application Form - ECS Transportation	October 31, 2013	FRA
	Private ECS' -Regular and Special Transportation School Jurisdictions	November 30, 2013	BOSS
13AE3.0	Accredited Funded Private School Authority Accountability and Funding Declaration	April 30, 2013	SF
13AE5.3	SuperNet Service Funding Application	Upon Connection	STB
13AE6.1	Institutional Programs – Budget – Final	May 31, 2013	SF
		October 15, 2013	SF
13AE6.2	Regional Educational Consulting Services (RECS) - Budget – Actual Revenues and Expenditures	June 30, 2013	SF
		November 30, 2013	SF
13AE6.5	Ft. McMurray Allowance FTE Calculation Form	January 31, 2014	SF

OTHER IMPORTANT DEADLINES

	DEADLINE
Duplicate Course Marks (prior school year) - Respond in the Funding Event System (FES)	December 31, 2013
-Submission of documentation for Duplicate Course Marks (prior school year)	January 31, 2014
Adjustments/changes to Enrollment data and coding in PASI	April 15, 2014
Resolution of Priority School Conflicts	April 30, 2014
-Back-up documentation for Priority School Conflicts	May 15, 2014
Course and Marks Submission or Modification to SCM (School Course Marks)	
-Term 1	June 30, 2014
-Term 2, 3, 4	October 30, 2014
Course Conflicts	
-All Terms	December 31, 2014

LEGEND:	SF	=	School Finance Branch		STB	=	Stakeholder Technology Branch
	FRA	=	Financial Reporting and Accountability Branch		BOSS	=	Business Operations and Stakeholder Support Branch

DELEGATION OF SIGNING AUTHORITY 2013/2014 SCHOOL YEAR

This form is provided to allow the delegation of the Secretary-Treasurer's/Treasurer's and/or Superintendent's/President's signing authority to other individuals who are authorized by the board to sign Alberta Education funding applications on behalf of the Secretary-Treasurer/Treasurer Superintendent/President. In order for the delegation of authority to continue, this form must be submitted each year – even if there are no additions or deletions. If this form is not submitted to School Finance, then only the Secretary-Treasurer/Treasurer and the Superintendent/President are authorized to sign on behalf of the school authority.

School Authority Name: _____

School Authority Code: _____

NAME(S) (Please Print)	POSITION	SIGNATURES

CERTIFICATION

I certify that the above listed individuals are approved by the board to sign Alberta Education funding application forms:

Secretary – Treasurer

Date

JUNIOR HIGH COURSES TAKEN BY SENIOR HIGH STUDENTS 2013/2014 SCHOOL YEAR

Name of School Jurisdiction or Private School: _____ Authority Code: _____

Name of School: _____ School Code: _____

NOTE: Separate forms are required for each completion date and category combination.

COMPLETION DATE

☐ September 1 to March 1
 ☐ March 2 to June 30
 ☐ July 1 to August 31
 (Summer School Only)

A – add D – delete	Alberta Student Number (ASN)	Name of Student (Alphabetical) Surname / Given Name(s)	Course Name	Credit Value	Course Mark

CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

**FUNDED STUDENTS ATTENDING FIRST NATIONS SCHOOLS
ON A RESERVE
2013/2014 SCHOOL YEAR**

School Authority
Name: _____

School Authority Code: _____

[illegible]

CERTIFICATION

I certify the information reported on this form is correct.

Signature of Secretary - Treasurer

Date

DECLARATION OF MANAGEMENT FOR 2012/2013 SCHOOL YEAR

School Jurisdiction Name: _____

School Authority Code: _____

"As the Superintendent and Secretary-Treasurer, we certify that our jurisdiction's management controls related to the submission of Credit Enrolment Units (CEUs) have been reviewed and approved, and that these controls are aligned with the funding requirements for CEU funding as outlined in Alberta Education's *Funding Manual for School Authorities*."

TITLES / NAMES [Please Print Name]	SIGNATURES	DATE
Superintendent		
Secretary Treasurer		

APPLICATION FOR REIMBURSEMENT OF ADL COURSE COSTS FOR HOME EDUCATION STUDENTS IN GRADES 7 TO 12 2013/2014 SCHOOL YEAR

For home education students in grades 7 to 12 whose ADL courses were taken through ADLC and were fully funded by the associate board/associate accredited-funded private school or for students who moved from another associate board/associate accredited-funded private school after the count date.

Name of School Authority: _____ Authority Code: _____

Name of School: _____ School Code: _____

Alberta Student Number	ADLC File No.	Name of Student (Alphabetical) Surname/Given Name(s)	Grade	Course Code	Approved ADL Course Costs
TOTAL					\$0.00

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under "Courses". Only approved ADLC Print course costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of \$1,641.27 per student. Costs for online courses and optional resources are not eligible for this funding.

CERTIFICATION

I certify that the information reported on this form is correct.

(Signature of: Secretary-
Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

APPLICATION FOR REIMBURSEMENT OF ADDITIONAL ADL COURSE COSTS FOR HOME EDUCATION STUDENTS IN GRADES 1 TO 6 2013/2014 SCHOOL YEAR

For home education students in Grades 1 to 6 taking a full course load of ADL courses through the Alberta Distance Learning Centre (ADLC) where the total compulsory course costs exceed the 50% funding provided by the associate board.

Name of School Authority: _____ Authority Code: _____

Name of School: _____ School Code: _____

Name of Student (Alphabetical) for which a full course load has been purchased Surname/Given Name(s)	Alberta Student Number	Grade	ADL Course Costs in Excess of 50% Funding provided by the Associate Board*
TOTAL			\$0.00

For Course and Course Costs information please refer to the appropriate Course Guide which is available on the ADLC website at: www.adlc.ca under "Courses". Only approved ADLC Print courses with costs for Tuition Fees, Lesson Materials and Required Resources are eligible for reimbursement at 50% to a maximum of \$1,641.27 per student. Costs for online courses and optional resources are not eligible costs.

CERTIFICATION

I certify that the information reported on this form is correct.

(Signature of: Secretary-
Treasurer/Superintendent)

(Signature of: Teacher/Principal)

(Date)

ECS PROGRAM UNIT FUNDING APPLICATION FOR PRIVATE ECS OPERATORS (with 5 or fewer PUF children)

See Section 1.5 of the Funding Manual for School Authorities for information on the completion of this application. See also the PUF Fact Sheet and Special Education Coding Criteria.

Submit one copy of this application and only one Budget for all the PUF Children in your program

Name of Private ECS/Private School: _____

Name of School/Centre: _____

Address: Postal Code: _____

Contact Person: Telephone No: _____

E-Mail Address: Fax No: _____

Number of Program Unit Children: <small>(claimed on this application)</small>	Budget Amount: <small>(for this application)</small>	
---	--	--

Have any of these Program Unit children been with a previous operator? Yes _____ No _____

Has Basic Instruction funding been claimed for these children? Yes _____ No _____

NOTE:

- The budget amount is subject to change upon review by the Alberta Education Staff.
- Final payments will be based on the lesser of the approved budget amount, funding ceiling or actual expenditures.

DECLARATION

The undersigned does hereby declare that an individualized program has been developed and will be carried out for each child on this application that:

- The **parent(s)** / guardian(s) of each child in this program unit is/are fully aware that special program plans are in place and that this application is being submitted on the child's behalf.
- Each child has been identified through screening and assessment carried out by community health nurses, **parent(s)** / guardian(s), teachers and/or child development specialists in accordance with criteria outlined in Special Education Coding Criteria 2012/2013.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special education needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and **parent(s)** / guardian(s) as required.
- Direct services will be provided to each child and/or **parent(s)** / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the **parent(s)** / guardian(s).
- Long term plans for the child(ren) have been discussed with the receiving **school authority(ies)**.

I certify that the programs identified in this report are being offered in accordance with Alberta Education program requirements and that the information provided on this application is correct.

Signature of Secretary – Treasurer

Date

DETAILS of CHILDREN IN PROGRAM UNITS																		
	Alberta Student #	Name of Child Surname/Given Name(s)	Age	Date of Birth			Location(s) of Child's Program (Including AM or PM)	R or N	Assessed Primary** Disability/Delay Code	Date Program Starts			Date Program Ends			Number of Centre Program Hours	Family-oriented Programming Sessions	
			Dept Use Only	Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Sessions	Total # of Session Hours
		FIRST PROGRAM UNIT																
1																		
2																		
3																		
4																		
		SECOND PROGRAM UNIT																
1																		
2																		
3																		
4																		
		THIRD PROGRAM UNIT																
1																		
2																		
3																		
4																		
		FOURTH PROGRAM UNIT																
1																		
2																		
3																		
4																		
		FIFTH PROGRAM UNIT																
1																		
2																		
3																		
4																		

*In this column please indicate whether it is:

(R) – for a renewal application;

(N) – for a new application.

**

Refer to assessed primary disability by code; i.e. Code 41 Severe Cognitive Disability, Code 42 Severe Emotional/Behavioural Disability, Code 43 Severe Multiple Disability, Code 44 Severe Physical or Medical (including autism) Disability, Code 45 Deafness, Code 46 Blindness and Code 47 Severe Delay Involving Language

For Code 44, if the child has autism or other pervasive developmental disorders, also write in specific disability in the space provided.

PROGRAM UNIT FUNDING (PUF) BUDGET for PRIVATE ECS PROGRAMS

PLEASE SUBMIT ONE BUDGET FOR ALL THE PUF CHILDREN IN YOUR PROGRAM

PROGRAM UNIT COSTS

INSTRUCTIONAL COSTS

Instructional Salaries and Wages (Please attach breakdown of costs

(i.e. # of teacher aides and costs, sp.ed. consultation costs, etc.)

Employer's Portion of Fringe Benefits

Specialized Services and Supports (Please attach breakdown of type of service

(i.e. OT, PT, Speech, Psych. etc. and cost of each type of service)

Supplies and Materials (Please attach a list if > \$500 per child)

PARENT INSERVICE

STAFF INSERVICE

TRANSPORTATION COSTS:

• Transportation to and from school	# of round trips	_____	X	_____	=	_____	\$0.00
• Family-Oriented Programming	# of FOP sessions	_____	X	_____	=	_____	\$0.00
• Other: - Field Trips						_____	
• In-Program Transportation						_____	
Total Transportation Costs						_____	\$0.00 (A)

LESS: TRANSPORTATION REVENUES

Alberta Education Transportation Funding: (See Funding Manual, Part 2, Sections 1.24 and 1.25 for Private ECS Operators)

• Special Transportation	# of round trips	_____	x \$18.24	_____	\$0.00
• Regular Transportation	# children	_____	x \$549/yr	_____	\$0.00
• Family-Oriented Programming Transportation	# of sessions	_____	x \$ 18.24	_____	\$0.00
• Other Transportation Revenue (i.e. fees)				_____	
Total Transportation Revenues				_____	\$0.00 (B)

NET TRANSPORTATION COSTS: (Costs (A) less Revenues (B), if difference is negative enter 0)

Specialized Equipment and Furniture (Please attach breakdown of costs)

TOTAL ECS PROGRAM UNIT COSTS \$0.00

Guidelines for the above expenditure areas are found in the *PUF Fact sheet*.

DEPT. USE ONLY CEILING AMOUNT (based on program hours and # of FOP sessions)

**STATEMENT OF ACTUAL PROGRAM UNIT FUNDING (PUF)
EXPENDITURES FOR SCHOOL JURISDICTIONS
2012/2013 SCHOOL YEAR**

Name of School Jurisdiction: _____

- Complete one statement of actual expenditures for all Program Unit Funded (PUF) children.
- Final payment of Program Unit Funding will be based on the lesser of actual expenditures, approved budget amount, and ceiling amount.
- Guidelines for expenditures are found in the Funding Manual for School Authorities, Section 9.1, Program Unit Funding

Contact Name : _____ Telephone No. _____

CERTIFICATION

FUNDING CALCULATION:

i) Actual Expenditures (from pg.2)	\$ _____
ii) Approved Budget Total (dept. only)	\$ _____
iii) Funding Ceiling Total (dept. only)	\$ _____

I certify that the information reported on this form is correct and that the above costs have not been claimed under any other program.

(Signature of Secretary Treasurer)

(Date)

FOR DEPARTMENT USE ONLY:

Allocation Approved \$ _____

Approved By

(Signature of Expenditure Officer)

(Date)

ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS FOR THE 2012/2013 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: _____

INSTRUCTION

Supplemental Instructional Salaries and Wages

Employer's Portion of Fringe Benefits

Specialized Services and Supports

Supplies and Materials

PARENT INSERVICE/STAFF INSERVICE

TRANSPORTATION COSTS:

**Actual Costs
(A)**

**Revenue
(B)**

To and From School

Family Oriented Programming Sessions

Other

TOTALS

\$0.00

\$0.00

Net transportation Costs: (A) – (B) (if difference is negative, enter 0)

\$0.00

PROGRAM COORDINATION COSTS

SPECIALIZED EQUIPMENT AND FURNITURE

(ONLY capital equipment approved on a budget should be claimed)

(Please attach a list of capital items purchased indicating the child's name beside each)

TOTAL ECS PUF EXPENDITURES

\$0.00

FOR DESIGNATED SPECIAL EDUCATION/CONGREGATED ECS PROGRAMS ONLY

LESS APPLICABLE REVENUE

Base Instruction Funding # of ECS Children on Sept. 30 _____ x \$3,997.79 \$0.00

Mild to Moderate Funding # of ECS Children on Sept. 30 _____ x \$2,438.00 \$0.00

Other Revenues (please specify) _____

TOTAL REVENUES

\$0.00

NET ECS PROGRAM COSTS ELIGIBLE FOR PUF

\$0.00

PROGRAM UNIT FUNDING PUF APPLICATION ADJUSTMENTS FORM 2013/2014 SCHOOL YEAR

NAME OF PRIVATE ECS OPERATOR: _____

This form is only for Private ECS Operators who submitted a paper PUF application. Other School Authorities should make their changes through PUFs.

To be completed for PUF children who have left your program earlier than reported on your PUF application, please provide the following information so that your PUF budget and ceiling can be adjusted. (one form per unit). This form can also be used to add new children who were not on your original PUF application.

Alberta Student Number (ASN): _____

Child's Name: _____

Child's Program Start Date: _____ End Date: _____

Number of Centre Program hours provided: _____

Number of Family-Oriented ECS programming (FOP) sessions: _____

Number of Family-Oriented ECS programming (FOP) hours: _____

ESTIMATE OF ALL COSTS INCURRED: Please provide a breakdown by cost category:

Teacher Assistant Salaries/wages \$ _____

Employer's Portion of Fringe Benefits \$ _____

Specialized Services and Supports \$ _____

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

(# of hours _____ x _____ rate per hour)

Supplies and Materials \$ _____

Parent In-service – \$ _____

Staff In-service – \$ _____

Transportation Costs:

- To and from school # trips _____ x \$ _____ \$ _____
- # of FOP sessions _____ x \$ _____ \$ _____
- Other: - Field Trips \$ _____
- In-Program Transportation \$ _____

Total Transportation Costs \$ _____

Specialized Equipment and Furniture: \$ _____

Total PUF Costs: \$ _____

ACCREDITED FUNDED PRIVATE SCHOOLS ACCOUNTABILITY AND FUNDING DECLARATION 2013/2014 SCHOOL YEAR

Accredited Funded Private School Authority Name: _____

Accredited Funded Private School Authority Code: _____

NOTE: For private schools who have not already applied for Level 2 funding. To apply for Level 2 funding for the 2013/2014 school year, this Declaration must be submitted to Alberta Education, School Finance Branch or the School Accreditation and Disputes Resolution Branch by **April 30, 2013**.

Level 1 – the accountabilities and monitoring activities ascribed to this accredited funded private school authority will continue to be those used by Alberta Education. Eligible funding allocations will continue to include grants as authorized in the *Funding Manual for School Authorities 2013/2014 School Year*.

Level 2 – the accountabilities ascribed to this accredited funded private school authority will include accountabilities that are part of the provincial accountability program. Eligible funding allocations will include grants as authorized in the *Funding Manual for School Authorities 2013/2014 School Year*.

Please read the following options and indicate your Declaration by checking **one** of the following.

() Maintain Level 1 Accountabilities and Funding

As the Board Chairperson, Principal/Superintendent, and Treasurer, we certify our decision to maintain Level 1 accountabilities and funding allocations for the current school year. We understand that, by choosing this option at this time, it does not preclude our accredited funded private school authority from choosing Level 2 for subsequent school years, through the submission of an authorized Accredited Funded Private School Accountability and Funding Declaration.

- We understand that all funding allocations from Alberta Education are pursuant to the Minister of Education's authority to make grants under section 13 of the *Government Organization Act* and under the *Education Grants Regulation*. As such, all relevant legislative provisions apply to Level 1 and Level 2 funding.

() Accept Level 2 Accountabilities and Funding

As the Board Chairperson, Principal/Superintendent and Treasurer, we certify our decision to choose Level 2 accountabilities and funding allocations to our accredited funded private school authority for the 2013/2014 school year.

By choosing level 2, we confirm the following:

- We understand that this decision is permanent.
- We agree to the Level 2 accountabilities that are part of the provincial accountability program.
- Our decision to choose Level 2 accountability and funding has been approved by our Board. Minutes from the Board meeting, where the Motion was passed, are attached to this Declaration.
- We understand that all funding allocations from Alberta Education are pursuant to the Minister of Education's authority to make grants under section 13 of the *Government Organization Act* and under the *Education Grants Regulation*. As such, all relevant legislative provisions apply to Level 1 and Level 2 funding.

PRINT NAME	SIGNATURE	DATE
Board Chair		
Principal or Superintendent		
Treasurer		

For Department Use Only:

Reviewed By:

School Accreditation and Dispute Resolution _____ Date: _____

System Assurance _____ Date: _____

School Finance _____ Date: _____

SUPERNET SERVICE FUNDING APPLICATION 2013/2014 SCHOOL YEAR

Name of School
Authority: _____

Authority Code: _____

Contact Name: _____ Phone No.: _____ E-mail: _____

School Code (if applicable)	Site Name	Site Address	SuperNet Service Connection Date	Monthly SuperNet Service Charge

CERTIFICATION

I certify that the information reported on this form is correct.

(Signature of: Secretary Treasurer/Superintendent)

(Date)

Approved by _____

(STB)

(Date)

EDUCATION PROGRAM IN AN INSTITUTION (EPI) Funding Application Form 2013/2014 School Year

NAME OF SCHOOL AUTHORITY: _____

CONTACT PERSON: _____ TELEPHONE: _____

Please indicate whether this is a budget or final costs claim by checking the appropriate box.

☐ Budget (May 31) ☐ Final Costs (October 15)

Name of Program	School Code	Net Program Cost
Total Net Program Costs		\$0.00

CERTIFICATION

I certify that the students claimed for this funding reside in an institution and are resident students of the Government as per Section 44(7) of the School Act (RSA 2000), or are day students as defined in the Funding Manual or are temporary residents of a women's shelter. I also certify that the Institutional program(s) are under contract with Alberta Education or have had prior approval from the School Accreditation and Disputes Resolution Branch and that the programs identified in this report are being offered in accordance with Alberta Education's program requirements.

(Signature of Superintendent or Designate)

(Date)

I certify that the information reported on this form is correct.

(Signature of Secretary Treasurer)

(Date)

DEPARTMENT USE ONLY:

Total Net Program Costs \$ _____

Performance Certifier

Date

Expenditure Officer

Date

Regular EPI Program Budget/Final Costs 2013/2014

NAME OF PROGRAM: _____

CONTACT PERSON: _____

TELEPHONE: _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the *Funding Manual for School Authorities*. Note: If your program only has **institutional students**, then complete this form. If your program also has some non-institutional students, you are considered a Mixed Institutional Program and must complete the form for Mixed Institutional Programs rather than this form.

1 Instructional Salary Costs	FTE's	
a. Certificated Salaries & Benefits	_____	_____
b. Uncertificated Salaries & Benefits	_____	_____
c. Substitute Teacher(s)	_____	_____
Total Instructional Salary Costs	_____	\$0.00

2 Supplies and Services Costs	
a. Professional Development	_____
b. Educational Supplies	_____
c. Education Services	_____
d. Office Supplies	_____
Total Supplies and Services Costs	\$0.00

3 Technology costs (see guidelines for formula)

TOTAL PROGRAM COSTS \$0.00 A

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS

Note: please do not include Institutional funding

1. **Base Instruction** (based on Sept 30 enrolments of 550 coded students)

Number of Institutional students enrolled -**Budget Only** \$0.00

Number of Institutional students enrolled -**Final Only** \$0.00

For Budgets, use an estimate based on previous years Sept. 30 enrolments –please do not use the average number of students enrolled. For Final Costs, use actual Sept 30 enrolments.

2. **Other funding (please specify)** _____

TOTAL REVENUES \$0.00 B

NET PROGRAM COSTS (Total Program Costs less Total Revenues (A – B = C) \$0.00 C

Average number of students enrolled

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than 1 month will be counted for each month attended (i.e. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For EPI Budgets, please use monthly enrolments for the prior school year. For EPI Finals, please use monthly enrolments for the school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3: Divide the annual total by the # of months the program operated to calculate the average # of students enrolled.

Final claims -please attach a list of Institutional students (with ASN's) in attendance on Sept 30.

Instructions for Completion of the EPI Funding Application

Important: There are **two categories of institutional programs; Regular and Mixed programs**. Regular **institutional** programs only have **institutional students** (i.e., students who were placed in the **institution** by a government agency). Programs of this type should complete the Regular **Institutional** Program form. Mixed **institutional** programs have both **institutional students** and non-**institutional students**. Non-**institutional students** are students who were not placed by a government agency (i.e. students placed by the school jurisdiction, tuition students from another school jurisdiction or tuition students from out-of -province.) Programs of this type should complete the Mixed **Institutional** Program form.

1. Instructional Salary Costs

- a) Certificated Salaries & Benefits: teacher/school administration salaries & benefits
- b) Uncertificated Salaries & Benefits: teacher assistants & office staff,
- c) Substitute Teacher(s): costs for subs when teachers or teacher assistants are not in school

2. Supplies and Services Costs

- a) Professional Development: staff training, conferences, & in-services
- b) Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.

- c) Educational Services: costs for educational or psychological assessments directly related to providing the education program.

Note: Counseling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of the Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.

- d) Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.

Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

3. Technology Costs

Computers and computer upgrades, peripherals such as printers for instructional use and assistive devices for students with special education needs; technical support; and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:

- a) Actual costs not exceeding the formula amounts in (b) below, or
- b) \$500 X the average number of students enrolled (line D of the budget form) to a maximum of:

21 to 50 students =\$20,000 51 to 100 students =\$40,000 over 100 students =\$50,000

Revenues: Please list the Base Instruction revenues you received (or plan to receive) for the **institutional students** who were enrolled on the **count date** (note: these students should be coded as 550 in order to receive funding). List other funding you received for **institutional students** in your program, but do not include any **Institutional** Funding payments you have received. For Mixed **Institutional** programs, please ensure that the revenues reported are only for **institutional students**. Revenues for non-**institutional students** should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1:

Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3:

Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

Average Number of Institutional Students Enrolled: (Mixed Programs only)

Use the same formula as above for average number of students enrolled except only use the number of **institutional students** and do not include the non-institutional students who are enrolled.

Mixed EPI Program Budget/Final Costs 2013/2014

NAME OF PROGRAM: _____

CONTACT PERSON: _____

TELEPHONE: _____

Please see Instructions (attached) for completion of this form. Also see Section 6.1 of the *Funding Manual for School Authorities*. Note: If your program has some non-institutional students, you are considered a Mixed Institutional Program and must complete this form.

1 Instructional Salary Costs	FTE's	
a. Certificated Salaries & Benefits	_____	_____
b. Uncertificated Salaries & Benefits	_____	_____
c. Substitute Teacher(s)	_____	_____
Total Instructional Salary Costs	_____	\$0.00
2 Supplies and Services Costs		
a. Professional Development	_____	_____
b. Educational Supplies	_____	_____
c. Education Services	_____	_____
d. Office Supplies	_____	_____
Total Supplies and Services Costs	_____	\$0.00
3 Technology costs (see guidelines for formula)		_____
TOTAL PROGRAM COSTS		\$0.00 A
REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS		
Average number of students enrolled (see guidelines for this calculation)		_____ B
AVERAGE COST PER STUDENT (A÷B)		#DIV/0! C
Average number of Institutional students enrolled (see guidelines)		_____ D
PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (C x D)		#DIV/0! E

Note: only show revenues for institutional students. Please do not include Institutional funding nor any revenues for non-institutional students.

1. **Base Instruction** (based on Sept 30 enrolments of 550 coded students)

Number of Institutional students enrolled - **Budget Only** _____ \$0.00

Number of Institutional students enrolled - **Final Only** _____ \$0.00

For Budgets -use an estimate based on previous years Sept. 30 enrolments -please do not use the average number of students enrolled. For Final Costs, use actual Sept 30 enrolments

2. **Other funding** (please specify) _____

TOTAL REVENUES FOR INSTITUTIONAL STUDENTS

\$0.00 **F**

NET PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E- F)

#DIV/0!

Note: For final claims, please attach a list of the institutional students (with ASN's) in attendance on Sept. 30

Instructions for Completion of the EPI Funding Application

Important: There are two categories of institutional programs; **Regular and Mixed programs**. Regular **institutional** programs only have **institutional students** (i.e., students who were placed in the **institution** by a government agency). Programs of this type should complete the Regular **Institutional** Program form. Mixed **institutional** programs have both **institutional students** and non-**institutional students**. Non-**institutional students** are students who were not placed by a government agency (i.e. students placed by the school jurisdiction, tuition students from another school jurisdiction or tuition students from out-of -province.) Programs of this type should complete the Mixed **Institutional** Program form.

4. Instructional Salary Costs

- a) Certificated Salaries & Benefits: teacher/school administration salaries & benefits
- b) Uncertificated Salaries & Benefits: teacher assistants & office staff,
- c) Substitute Teacher(s): costs for subs when teachers or teacher assistants are not in school

5. Supplies and Services Costs

- a) Professional Development: staff training, conferences, & in-services
- b) Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.

- c) Educational Services: costs for educational or psychological assessments directly related to providing the educational program.

Note: Counseling, treatment, therapy or psychiatric services are not to be included in this category as these are the responsibility of the Regional Health Authority, Alberta Solicitor General or the agency operating the **institution**.

- d) Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.

Note: Office capital equipment such as copiers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the Alberta Health and Wellness, Alberta Solicitor General or the agency operating the **institution**.

6. Technology Costs

Computers and computer upgrades, peripherals such as printers for instructional use and assistive devices for students with special education needs; technical support; and software for teacher and student use that supports the learner outcomes identified by Alberta Education. Technology costs will be calculated using the lesser of the following amounts:

- a) Actual costs not exceeding the formula amounts in (b) below, or
- b) \$500 X the average number of students enrolled (line D of the budget form) to a maximum of:

21 to 50 students =\$20,000 51 to 100 students =\$40,000 over 100 students =\$50,000

Revenues: Please list the Base Instruction revenues you received (or plan to receive) for the **institutional students** who were enrolled on the **count date** (note: these students should be coded as 550 in order to receive funding). List other funding you received for **institutional students** in your program, but do not include any **Institutional** Funding payments you have received. For Mixed **Institutional** programs, please ensure that the revenues reported are only for **institutional students**. Revenues for non-**institutional students** should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1:

Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For EPI Budgets, please use monthly enrolments from the prior school year. For EPI Finals, please use monthly enrolments for the school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

Average Number of Institutional Students Enrolled: (Mixed Programs only)

Use same formula as above for average number of students enrolled except only use the number of **institutional students** and do not include the non-**institutional students** who are enrolled.

RECS PROGRAM NAME: _____
SCHOOL JURISDICTION: _____
CONTACT PERSON: _____ TELEPHONE: _____

FORT MCMURRAY ALLOWANCE FTE CALCULATION FORM 2013/2014 SCHOOL YEAR

Authority Name: _____

School Authority _____ **Code:** _____

Staff Categories	Number of Staff	Total FTE
Certified Teachers	_____	_____
Support Staff ¹ :		
Teachers Assistants	_____	_____
Administrative Support	_____	_____
Custodial	_____	_____
Maintenance	_____	_____
Other	_____	_____
Out of Scope/Exempt Staff ²	_____	_____
Total FTE for all Staff Categories		_____

¹ Covered by a collective agreement; (e.g. Calculate FTE based on contract, 10 months = 0.8 FTE).

² Staff not covered by a collective agreement.

CERTIFICATION

I certify the information reported on this form is correct.

(Signature of: Secretary-
Treasurer/Superintendent)

(Date)

- The terms listed in the Glossary of Terms are **bolded** throughout the Funding Manual.

Accredited Funded Private School

An accredited **private school** as defined in section 28(2) of the *School Act* that receives a grant under the *Education Grants Regulation*.

Accumulated Deficit from Operations (ADO)

In the Audited Financial Statements – Statement of Changes in Accumulated Surplus and Notes to the Financial Statements or in the Budget Report – Statement of Changes in Accumulated Surplus where the total of Unrestricted Surplus and Operating Reserves is less than zero.

Activity Program

A co-curricular activity outside of, and usually complementary to, the regular curriculum offering a high standard of professional training. This activity should require intensive training of the student.

Alternative French Language Programs

A program offered under sections 11 and/or 21 (1)(a) of the *School Act* where French is used as the language of instruction. These are commonly referred to as French Immersion Programs.

Minimum Instructional Hours:

- ECS – 238 hours (50%) of the instructional time using French as the language of instruction.
- Elementary – 475 hours (50%) of the instructional time using French as the language of instruction.
- Junior High – 380 hours (40%) of the instructional time using French as the language of instruction.
- Senior High – 250 hours (10 credits) per year using French as the language of instruction.

Annual Operating Deficit

In the Audited Financial Statements or the Budget Report - Statement of Revenues and Expenses - where the expenses exceed the revenues.

ASFF Eligible Student

As used in the *Alberta School Foundation Fund Regulation* (ASFF) calculation and ASFF regulation means a student who:

1. on the **September count date**, meets the requirement of section 8(1)(b) of the *School Act*;
2. has a **parent** who ordinarily resides in Alberta or is an **independent student** between 18 and 20 years of age who resides in Alberta;
3. is enrolled in and is attending a **school** operated by a **board**;
4. is at least 5 years 6 months but less than 20 years of age on September 1;
5. is not a student enrolled in a **home education program**;
6. is not a **funded child** to whom an **early childhood services program** is being provided pursuant to section 30(1)(a) of the *School Act*; and
7. is not an Indian residing on a reserve pursuant to the *Indian Act* (Canada).

Associate Board

The **resident board** or non-resident school board supervising a student's home education program.

Associate Accredited Funded Private School

The **accredited funded private school** supervising a student's home education program.

Audition

A trial performance in which an actor, singer, dancer, athlete or other performer demonstrates prowess in his or her abilities where the audition results are used to determine entry qualification.

Blended Program

An educational program consisting of two distinct parts:

1. A school-provided program where a teacher employed by a **school board** or an **accredited funded private school** is responsible for providing the planning, resource selection, instructional delivery, assessment and evaluation of student progress in selected courses that follow the *Alberta Programs of Study* with the following minimum requirements;
 - Grade 1 – 9 Minimum of 50% school provided program
 - Grade 10 – 12 Minimum of 20% school provided program
2. A Home Education Program that meets the requirements of the *Home Education Regulation*.

Board - See definition of "School Board".

CEU (Credit Enrolment Unit)

A funding unit used to calculate base instructional funding at the high school level for **school authorities**. **CEUs** are assigned when the course, the student, and the student's achievement in a course meet all established criteria as follows:

Course

- Courses delivered to students must align with the provincially mandated *Programs of Study*
- Must provide access to instructional hours where applicable
- Must meet administrative requirements (e.g. Locally Developed Courses require a board motion and Alberta Education approval)

Student

To be eligible for **CEU** funding the student taking the course must meet the definition of a **funded student** for the school year in which the course is taken. Exception: A student may be eligible for **CEU** funding if they meet all the **funded student** criteria except attendance on the September count date. Any questions regarding this criterion may be directed to the School Finance Branch.

Student Achievement

The student must meet the established achievement criteria for a specified course to qualify for CEU funding. Student credits do not directly relate to Credit Enrolment Units (CEU). The funding relationship of CEUs to courses is as follows:

1 credit courses = 1 **CEU**; 3 credit courses = 2.5 **CEUs**; 5 credit courses = 5 **CEUs**

CEU funding rates can be found in the Rates Tables in Part 8 of this manual.

Challenge Assessment

An assessment of a student to determine if they already possess the knowledge, skills and attitudes for a course as identified in the *Programs of Study* in order to receive credit and a final mark in the course.

Charter Board

The society or company that is named in a charter as being responsible for the operation for a **charter school**, as per section 34(2) of the *School Act*.

Charter School

A **school** established under section 32 of the *School Act* and operated per section 34 of the *School Act*.

The following **charter schools** have been approved for this school year:

- | | |
|--|---|
| • Almadina School | • Foundations for the Future Charter Academy School |
| • Aurora Charter School | • Mother Earth's Children's Charter School |
| • Boyle Street Education Centre | • New Horizons School |
| • Calgary Arts Academy | • Suzuki Charter School |
| • Calgary Girls School | • Valhalla Charter School |
| • Calgary Science School | • Westmount Charter School |
| • CAPE – Centre for Academic and Personal Excellence Institute | |

Child with a Disability/Delay

A **funded child** who is assessed and identified as having a mild, moderate or severe disability/delay as defined in the *Special Education Coding Criteria*.

Child with a Mild/Moderate Disability/Delay

A **funded child** who is assessed and identified as having a mild/moderate disability/delay, as defined in the *Special Education Coding Criteria*.

Child with a Severe Disability/Delay

A **funded child** who is assessed and identified as having a severe disability/delay as defined in the *Special Education Coding Criteria*.

Child with Special Education Needs

A **funded child** who is assessed and identified as having a mild, moderate or severe disability/delay or who is gifted and talented as defined in the *Special Education Coding Criteria*.

Clustering

The grouping of **children with severe disabilities/delays** on a Program Unit Funding application where children are listed in the same unit. **Clustering** is determined by the sharing of resources — typically teacher assistant time and/or other services — between two or more children with severe disabilities/delays. While **clustering** may involve children receiving programming in the same classroom at the same time, it is the sharing of resources rather than the setting that determines the **clustering** of children. The decision to cluster **children with severe disabilities/delays** should be based on the educational needs of the children.

Day Students

Are **funded students** that attend an educational program in an **institution** approved for **day students** on a day-basis but do not reside in the **institution** and who are under the care of either:

- a) Alberta Health Services and require long term intensive medical treatment which can only be provided onsite in a hospital; or
- b) The Alberta Solicitor General and require intensive supervision by a probation officer.

Declaration of Management

Form 12AE1.2c is for Superintendents and Secretary Treasurers of **school jurisdictions** to certify that the management controls related to the submission of Credit Enrolment Unit (**CEU**) information has been reviewed and approved on an annual basis.

Density

A term used in Rural Transportation Block funding. The **density** rating for a **school jurisdiction** is calculated by dividing the **effective transportation area** in the jurisdiction by the number of weighted **eligible passengers** (**eligible passengers** multiplied by the **weighting factor** for each).

Designated School

A term used in Rural Transportation Block funding. A **designated school** is the **school** in which a **board** has enrolled a student in accordance with section 45(2) of the *School Act*.

Designated Special Education ECS Programs

An **ECS program** in which at least 70% of the **funded children** enrolled have a severe disability/delay. **ECS programs** with this designation may include **children with mild to moderate disabilities/delays** and/or regular ECS **funded children**, totaling a maximum of 30% of their ECS population. The following programs are approved with this status for this **school year**:

School Jurisdictions	Schools
• Black Gold Regional Division #18	– East Elementary Early Entry Program (3214) – Ecole Bellevue (3201)
• Calgary School District #19	– James Short Memorial School (Early Development Centre) (9364)
• Edmonton School District #7	– Beacon Heights School (7106) – Elmwood School (7204) – Evansdale School (7215) – Hospital School Campuses (7701) – Hazeldean School (7132) – Hillview School (7255) – Homesteader School (7240) – Inclusive Learning ECS Program (0484) – Mayfield School (7209) – Scott Robertson (7171) – Tevie Millar Heritage School (7772) – Waverley School (7189)
• Elk Island Public School Reg. Div. #14	– REACH Program
• Grande Prairie School District #2357	– Crystal Park Pre-School Program (1150)
• Greater St. Albert Catholic Regional Division #29	– Vital Grandin School (2578)
• Medicine Hat School District #76	– Herald Pre-School (6849) – Riverside School (6853) – Elm Street School (6848)
• Medicine Hat Catholic Separate Regional Division #20	– St. Louis Early Dev. Program (6872)
• Northern Lights School Division #69	– Vera M. Welsh School (2704)
• Parkland School Division #70 •	– Broxton Park School (2228)
• Wetaskiwin Regional Division #11	– Wetaskiwin Early Ed. Centre (WEEC)

Designated Special Education ECS Programs (Private ECS Operators)

- Aspire Special Needs Resource Centre (0289)
- Calgary Quest Children's Society (5398)
- Community Options (0151)
- Connect Society DEAF Services (0658)
- Cause & Effect (0274)
- Department of Speech Pathology and Audiology U of A (1032)
- Elves Special Needs Society (0655)
- GRIT Calgary (0284)
- GRIT Society of Edmonton (9887)
- New Heights Early Education Services (0432)
- PACE Kids (0302)
- Providence Child Development Centre (9827)
- Renfrew Educational Services (9672)
 - Renfrew – Janice McTighe Centre (0249)
 - Renfrew – Sundance Centre (0250)
 - Renfrew – Child Development Centre (0280)
 - Renfrew – Park Place Centre (0281)
 - Renfrew – Bowness Centre (0437)
- Society for Treatment of Autism (0212)
- The Heartland Agency (0285)
- The PREP Program (0230)

Designated Special Education Private School (DSEPS)

An **accredited funded private school** that has been given special approval and funding by the **Minister**, where the sole purpose of the **school** is to serve students who are identified with a mild, moderate, or severe disability. The educational programs provided to the students require modifications or adaptations to the *Programs of Study*, and are specified in the **Individualized Program Plan (IPP)** developed and implemented for each student. The following DSEPS are approved for the **school year**, based on an approved Notice of Intent:

Calgary Quest Children's Society (9795)

- Calgary Quest School (5398)

Edmonton Academy Society for Learning Disabled (9172)

- Edmonton Academy (7953)

Elves Special Needs Society (9263)

- Elves Child Development Centre (0655)

Foothills Academy Society (9107)

- Foothills Academy (9917)

Janus Academy Society (0025)

- Janus Academy (0032)
- Holy Cross Site (1323)

New Heights School and Learning Services Society (0077)

- New Heights School (0432)

Parkland Community Living and Supports Society (9027)

- Parkland School Special Education (4493)

Renfrew Educational Services Society (9672)

- Renfrew – Centre (0249)
- Sundance (0250)

Rundle College Society (9230)

- Rundle College Academy (5297)

The Calgary Society for Effective Education of Learning Disabled (9131)

- Calgary Academy (9908)

Third Academy International Ltd. (0023)

- The Third Academy – Calgary North (0031)
- The Third Academy – Calgary South (1446)

Developmentally Immature (Code 10)

A **funded child** who:

- is enrolled in an **ECS program** for a second year because the **parent** and the **school authority** agree that an **ECS program** is the most appropriate placement for the child;
- is less than seven years old on September 1;
- has not previously been coded as a **child with special needs**.

Distance

Refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school of choice**, whichever is closest.

Division

A **school division** or regional **division** established pursuant to the current *School Act* or any predecessor *School Act* or Ordinance *School Act*.

Early Childhood Services (ECS) Operator

A **school board**, an **accredited funded private school** or a **private ECS operator** that has been approved by Alberta Education to provide an ECS program

Early Childhood Services (ECS) Program

An education program provided pursuant to section 30 of the *School Act*.

ECS Home Program

An **ECS program** (kindergarten) delivered by an **ECS operator** in the home of a regular ECS child (not one with special education needs) who lives in a remote area where there is no ECS program offered in a **school** within a reasonable transportation **distance**. A certificated teacher must plan, deliver, and evaluate the program and the program must have at least twenty-two visits to the family home for a minimum of 1.5 hours each - considered equivalent to a basic 475-hour kindergarten program. Alberta Education must approve the **ECS home program**. The frequency, setting, and structure of an **ECS home program** must be determined in consultation with **parents**. An **ECS home program** is not a home-education kindergarten program and it is not **family-oriented programming**.

Education Services Agreement

An agreement entered into by a **board** under section 62(1)(b) of the *School Act* to have another party educate one of its **resident students**. If the **board** wishes to receive funding from Alberta Education, they must submit the agreement to the School Finance Branch by November 15 for review and funding approval. The **resident board** retains responsibility for its **resident student** as outlined in section 45 of the *School Act*.

Effective Transportation Area

This is the total area in square miles in a **school jurisdiction** including:

- any township in which a portion of the township is privately owned; and
- two square miles per mile of road corridor through vacant townships between populated areas, but excluding:
 - unpopulated Crown land, military reserves, grazing leases, provincial parks, and large bodies of water;
 - townships where two or more adjacent townships have vacant land which is at least the size of a township;
 - outlying townships within the jurisdiction boundary where the **school jurisdiction** provides no transportation service;
 - city, town, village or hamlet with a population greater than 10,000; and
 - for purposes of Rural Transportation Funding, the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**.

Eligible Passenger

For purposes of Student Transportation Funding, this refers to an individual who resides at least 2.4 kilometers from both their designated **school** and if applicable, their attending school of choice and is transported under section 51 of the *School Act* and the *Student Transportation Regulation* or required to be transported to and from **school** under section 51 of the *School Act* and the *Student Transportation Regulation* and is enrolled in a **school** of the **board**, as follows:

1. A **funded student** who:
 - a) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by that **board**; or
 - b) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by another **school authority** with which the **school jurisdiction** has an **education services agreement** for that student; or
 - c) resides within the boundaries of another **school jurisdiction** with which the **board** has an existing **transportation agreement** for that individual or who has been admitted to a **school** operated by another **board** and is transported within the boundaries of that **board**; or
 - d) resides in **unorganized territory** and attends a **school** operated by a **board** adjacent to the **unorganized territory**; or
 - e) resides in **unorganized territory** and attends a **school** operated by a **board** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**.

Eligible Transportation Distance

The **distance** the **eligible passenger** resides from their **designated school**. It is the one-way **distance** from the boundary at the roadway access to the residence nearest to the **school** of the quarter section or lot which the residence of the **eligible passenger** is situated to the **designated school** in kilometers on a traveled road or public right of way on any part of which the public is ordinarily entitled to walk or permitted to use for the passage of vehicles, but does not include privately owned laneways or roads. **Distances** that students are transported on private laneways or roads is **eligible transportation distance** only where the **eligible passenger** is wheelchair-bound, is a **student with a severe disability**, or is a **child with a severe disability/delay**.

Eligible Transported ECS Child

A **funded child** who resides at least 2.4 kilometers from the **ECS program** who is transported to the **ECS Program**.

Expected Eligible Passenger

In the Metro Urban Transportation section, this is the number of **funded students** and **funded children** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

Family-Oriented Programming

An **ECS program** for a **child with a severe disability/delay** that is individually planned, developmentally appropriate intervention, designed to actively involve the **parent** or alternate caregiver in the child's educational programming across settings. The purpose of **family-oriented programming** is to consult with the **parent** and to provide coaching, information, resources, skills, and strategies to facilitate the child's development. **Family-oriented programming** is done under the direction of a certificated teacher and is based on a 1:1 service delivery model involving the **parent**, teacher or developmental specialist, and in most cases the child. This programming is delivered in sessions.

First Nations Child/Student who Resides on a Reserve

A child/student registered under the *Indian Act* who lives on a reserve. These children/students are funded by the Government of Canada.

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Francisation

Targeted instructional supports for eligible children and students registered in a Francophone education program offered by Francophone regional authorities, to assist them in developing French language competencies that will allow them to fully integrate socially, academically, and culturally into the community and into Canadian Society as a Francophone.

Francophone Education Program

A program operated by a **Francophone Regional authority** under section 10 of the *School Act*.

Francophone Regional Authority

A Regional Authority for a Region established by the **Minister** under section 255 of the *School Act*.

French as a Second Language (FSL)

A program or course offered under sections 11 and 39 of the *School Act*

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Francophone Education

An education program offered under section 10(1) of the *School Act* for individuals with rights under section 23 of the *Canadian Charter of Rights and Freedoms* to receive **school** instruction in French.

Frozen Funded Head Count

This is an extract taken from Funding Events System (FES) on the last business day of May of the number of **funded children/students** enrolled on the **September Count Date**.

FTE Means Full-Time Equivalent.

FTE Funded Child(ren)/students

- a **funded child** counts as 0.5 FTE
- a **funded student** counts as 1.0 FTE

FTE Funded Enrolment

- a **funded child** counts as 0.5 FTE
- a **funded student** counts as 1.0 FTE

FTE Remote Rural Enrolment

- **funded children/students** receiving an education program in **schools** located in population centres of less than 5,000 people (see section 1.14 Equity of Opportunity funding).

FTE Weighted Enrolment

- a **funded child** counts as 0.5 FTE
- a **funded student** counts as 1.0 FTE
- a **funded child** with severe disabilities is counted as 1.5 FTE
- a **funded student** with severe disabilities is counted as 3.0 FTE

Funded Child

An individual who meets conditions 1, 2, 3, and 4 unless 5, 6, 7 or 8 apply:

1. is attending an **ECS program** on the **September count date** of the current **school year** operated by a **school authority** or is covered by an **education services agreement** under section 62 (1)(b) of the *School Act* that has been approved for funding by the School Finance Branch;
2. meets the minimum age requirements as set out in the following table*:

Category of Funded ECS Children	*Type of ECS Funding Provided	*Minimum age of the child on September 1 must be: (Born on or before March 1)
Regular ECS child	Base Instruction Funding (Maximum of 1 year funding)	4 years 6 months
ECS child with a mild/moderate disability/delay, or who is gifted and talented	Base Instruction Funding and Mild/Moderate (Maximum 2 years funding)	3 years 6 months
ECS child with English as a Second Language (ESL) needs or Francisation needs	Base Instruction Funding (Maximum 2 years funding). ESL/ Francisation Funding.	3 years 6 months
ECS child with severe disabilities/delay	Base Instruction Funding and PUF (Maximum 3 years funding)	2 years 6 months
ECS child who is developmentally immature	Base Instruction Funding (Maximum 2 years funding)	5 years 6 months

*The maximum years of funding cannot be combined. **ECS operators** must take into consideration the grade one school entrance age in the community when accessing the maximum years of ECS funding.

3. has a **parent** who ordinarily resides in Alberta on the **September count date**;
4. is a Canadian citizen on the **September count date**; or
 - a) is lawfully admitted to Canada for permanent residence; or
 - b) is a child of a Canadian citizen; or
 - c) is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or
 - d) is a step-child (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
 - e) is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:
 - i. proof of application for permanent resident status and fee payment to Citizenship and Immigration Canada (CIC); and
 - ii. valid study permit for the child.
5. For funding purposes a **First Nations child who resides on a reserve** does not qualify as a **funded child**.
6. An individual who is **developmentally immature** (code 10).
7. an individual who is at least 5 years 6 months but less than 6 years of age on September 1, and who is either coded severe or mild/moderate, may be counted as a **funded child** if the **school jurisdiction**, the **ECS operator** and the parent agree that an **ECS program** is the most appropriate placement, and the child has had less than the maximum years of funding for which they are eligible.
8. an individual who is at least 6 years of age, but less than 7 years old on September 1 may be counted as a **funded child** if they are enrolled in an **ECS Program** and are either **developmentally immature** or are entering an **ECS program** for the first time. Any other situations involving registering an overage child require special approval from the School Finance Branch.

Funded Student

An individual who meets conditions 1, 2, 3, and 4, unless 5, 6 or 7 apply:

1. Is attending a **school** or a **blended program** in Grades 1 to 12 on the **September count date** of the current **school year**;
 - a) operated by a **school jurisdiction** or the governing body of an **accredited funded private school**; or
 - b) is the subject of an agreement under section 62 (1)(b) of the *School Act* entered into by the student's **resident board** that has been approved for funding by the School Finance Branch; or
 - c) in another province or country under a **reciprocal exchange program** approved by Alberta Education with a student from that respective province or country.
2. Is at an age on September 1 in the **school year** in which he/she is counted, as follows:
 - a) at least 5 years 6 months old and is eligible to enter Grade 1 according to the school entrance age policy of the **school authority** that enrolls the student, but less than 20 years old; or
 - b) less than 5 years 6 months of age, is enrolled in Grade 1, and has previously attended an **Early Childhood Services (ECS) program** outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
 - c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability/delay and requires another year of ECS.
3. Is a Canadian citizen on the **September count date**; or
 - a) is lawfully admitted to Canada for permanent residence; or
 - b) is a child of a Canadian citizen; or
 - c) is a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; or
 - d) is a step-child (who has been issued a study permit) of a temporary foreign worker that is in Canada on a work permit; and who is the biological or adopted child of the temporary foreign worker's spouse or partner; or
 - e) is a step-child of a Canadian citizen and is the biological or adopted child of the Canadian citizen's non-Canadian spouse or partner. The following documentation is required:
 - i. proof of application for permanent resident status and fee payment to Citizenship and Immigration Canada (CIC); and
 - ii. valid study permit for the student.
4. Has a **parent** who ordinarily resides in Alberta on the **September count date**; or
 - a) is an **independent student** who is between 16 years of age and less than 18 years of age who resides in Alberta and has a **parent** that resides in Canada; or
 - b) is an **independent student** who is between 18 years of age and less than 20 years of age and who resides in Alberta.
5. A **First Nations student who resides on a reserve** is not counted as a **funded student**.
6. For funding purposes, a **home education student** is not counted as **funded student**.
7. For funding purposes within the Base Instruction Formula (section 1.2 and section 3.1), FTE's for students in a **blended program** are counted at the percentage of the school program.

Group Home

A foster home operated or approved by the government that provides treatment (therapeutic and/or specialized foster care) where there is more than one individual placed in the home. **Group homes** approved as **institutions** must provide 24 hour supervision and intensive treatment/assessment for students in a specialized, secure setting. If the **institution's** educational facility is not located on-site in the **group home**, transportation of students to and from **school** must be supervised.

High School Base Rate

A funding rate used for high school students who are block funded at the equivalent of 35 Tier 1 CEUs such as **students with special needs** (code 500), students in an **Institution** (code 550), and high school **refugee students** (code 640).

Highway

Any thoroughfare, street, road, trail, avenue, parkway, driveway, pedway, lane, square, bridge, or other place, whether publicly or privately owned, any part of which the public is ordinarily entitled or permitted to use for the passage or parking of vehicles. This includes a sidewalk (including the boulevard portion) and includes a **highway** right of way contained between fences or between a fence and one side of the roadway, all the land between the fences, or all the land between the fence and the edge of the roadway.

Home Education Student

A **funded student** who:

1. meets the requirements of the *Home Education Regulation*; and
2. is under the supervision of a **school jurisdiction** (except charter schools) or an **accredited funded private school** and has a **parent** who resides in Alberta on the **September count date**; and
3. Is at least 5 years and 6 months or older and eligible to enter Grade 1 according to the **school** entrance age policy of the **school jurisdiction**, but less than 20 years of age on September 1 in the **school year** in which he/she is counted.

Independent Student

A **funded student** who is:

1. at least 18 years of age but less than 20 years of age on September 1; or
2. at least 16 years of age but less than 18 years of age on September 1; and who is:
 - a) living independently; or
 - b) a party to an agreement under section 57.2 of the *Child, Youth and Family Enhancement Act*

Individualized Program Plan (IPP)

A precise plan of action designed to address the student's/child's special education needs, and is based on assessment information that provides the basis for intervention strategies. An **IPP** is mandatory for all students/children identified with special education needs, including mild, moderate, and severe disabilities/delays, and those who are gifted and talented.

In the Custody of a Director

Under the *Child, Youth and Family Enhancement Act* this is a student who is in custody by agreement, or in temporary custody, or in permanent custody.

Institution

A residence operated or approved by the government and prescribed by the **Minister** of Education as an **institution**. Residence staff are paid a salary to provide supervision and care on a 24-hour basis for individuals in the **institution**, which is not currently provided for under the terms and conditions of foster **parent** agreements with the Province of Alberta. **Resident students of the government** and **day students** may attend the **school** program on site or in a facility for which the government department controlling the **institution** is legally responsible.

SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION (EPI) for this school year

Battle River RD No. 31

Camrose Women's Shelter(4554)

Bosco Homes A Society for Children and Adolescents

Columbus Academy (0577)

Phoenix Academy (0028)

Thomas More Academy (0483)

Calgary School District No. 19

Dr. Gordon Townsend (9886)

Enviros Base Camp (9687)

ExCel Discovery Program (9687)

Westview YOC (9687)

William Roper Hull School (9033)

Women's Emergency Shelter (no code)

Young Adult Program (9512)

Youth Attendance Centre (9687)

Chinook's Edge School Division

Grimmon House (1058)

Equinox Group Home (1453)

Edmonton Catholic School District No. 7

AHS Youth Residential Treatment Ctr. (1174)

AHS Intensive Day Treatment Program (1576)

Edmonton School District No. 7

Attendance Centre (7706)

CASA House School (7706)

Counterpoint School (7706)

Highwood School (7706)

Hospital School Campuses (7701)

Howard House School (7706)

Kennedale School (7706)

Rite Trak School (7706)

Rosecrest School (7729)

Royal Alexandra School Campus (7701)

Stollery School Campus (7701)

WIN House (7169)

Yellowhead School (7706)

Elk Island PSD No. 14

A Safe Place (3343)

Elk Island Youth Ranch Learning Centre (1599)

Foothills SD No. 38

Stampede Ranch School (5391)

Holy Family CSRD No. 37

St. Francis Holistic Learning Centre(1619)

Lakeland RCSSD No. 150

Dr. Margaret Savage Centre School (2916)

Lethbridge SD No. 51

Harbour House School (6459)

Lethbridge Reg. Hospital School (6453)

Pitawani School (6456)

Stafford Ridge School (1380)

Medicine Hat School District No. 76

PAS (6864)

Northern Lights SD No. 69

Youth Assessment Centre (2716)

Parkland School Division No. 70

Bright Bank Academy (1321)

Peace Wapiti School Div No. 76

Rycroft Group Home (1055)

Red Deer Public School Dist No. 104

Direwood Treatment Centre (4461)

Oskayak Treatment Centre (4469)

Parkland Youth Homes (4464)

Red Deer Reg. Hospital Ed. Program (0574)

Youth Assessment Centre (4457)

Sturgeon SD No. 24

Oak Hill School (2509)

Wild Rose School Division No. 66

Kootenay School (4111)

Wolf Creek RD No. 72

`Wolf Creek Education Centre (4299)

Institutional Students

These are **resident students of government** who attend an education program in an **institution** (EPI) or are **day students** attending an EPI that is approved for **day students**.

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Levels of Support

Refers to the types of supports and services being provided to **students with a severe disability** in a **charter school** or an **accredited funded private school**. These students must receive three or more of the following types of support;

1. specialized equipment or assistive technology;
2. assistance with basic care (e.g., toileting, grooming, catheterization);
3. a minimum 0.5 **FTE** one-to-one instruction/intervention/support (e.g., specialized teacher and/or teacher assistant time);
4. frequent documented monitoring of medical and/or behaviour status; and
5. direct specialized services (e.g., behaviour specialist, orientation/mobility specialist).

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March Count Date

This is the specified date that **school authorities** take a second enrolment count of all their students and/or children for funding purposes. This enrolment count must be done on the first instructional day of March. For the 2013 /2014 **school year**, the **March count date** shall be March 3, 2014. If March 1 is a non-instructional day for a **school authority**, then the first instructional day of March shall be used as the **March count date**.

The submission date for this count will be the third instructional day after the **March count date**. For 2013/2014, the submission date will be March 6, 2014. School authorities should keep their student enrolment data updated regularly and verifying it prior to submission of the March count.

Minister

Refers to the Minister of Education.

Non-Operating Board

A **school jurisdiction** approved by the Minister of Education, which does not operate any schools but instead enters into **Educational Service Agreements** to meet its obligations to its **resident students**.

Online Program

An education program offered by a **school authority** and delivered electronically to a student under the instruction and supervision of a certificated teacher of a **board** or **accredited funded private school**. For full student funding, elementary and junior high students must have access to 950 hours of instruction and senior high students must have access to 1000 hours of instruction.

Operating Day

Is a day during which the **schools** of a **school jurisdiction** are scheduled to be open.

Other Language Programs

Requires a minimum of 25% of the instructional time to a maximum of 50% of instructional time uses a language other than French or English as the language of instruction. This includes all grade levels.

Outreach Program

A program offered by a **school** which provides a basic education for **funded students** who are unable to attend or benefit from a regular **school** program. The requirements of the program are detailed in the **Outreach Program Handbook**. An **outreach program** must be offered in a stand-alone facility.

Parent

With respect to a student, the relevant individual under section 1(1)(q) and (2) of the *School Act* unless otherwise specified.

Private Early Childhood Services (ECS) Operator

A society registered under the *Societies Act*, a non-profit company registered under Part 9 of the *Companies Act*, or a non-profit corporation incorporated by, or under, an act of the Legislature, or an **accredited funded private school**; that

1. has been approved by Alberta Education to operate an **ECS program**; and
2. receives funding under the *Education Grants Regulation* for the program.

Private School

A **school** registered under section 28 of the *School Act*.

Reciprocal Exchange Program

A recognized exchange program where an Alberta **resident student** attends a school in another province or country and changes place with a student from that province or country. The student from the other province or country must attend the Alberta student's resident **school authority** – either in the same **school year** or in the subsequent **school year**. The reciprocal exchange must be approved by the International Education Services Branch of Alberta Education.

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Refugee Student

A **funded student/funded child** who was born outside of Canada and has entered Canada as a refugee as defined in the *Immigration and Refugee Protection Act* as someone who has been forced to flee their country due to persecution. These students will require significant additional supports and services to deal with issues such as limited or disrupted formal schooling, traumatic events and adjusting to an unfamiliar culture.

An eligible student must provide the **school authority** with current documentation from Citizenship and Immigration Canada (CIC) substantiating the student's refugee status/claim. For funding purposes, this documentation must include the date of entering Canada as a refugee or the date a claim was made for refugee protection.

To receive Inclusive Education funding for refugee students, students must be coded as 640 (see Section 1.10). Refugee students will be included in the Inclusive Education funding calculation for a maximum of 5 years from the documentation date. In addition to the Inclusive Education funding, refugee students in high school will be funded at the **high school base rate** (see Section 1.2).

Resident Board

The **school board** of a **school jurisdiction** of which a student is a **resident student**.

Resident Student

An individual who is entitled to have access to an education program under section 8 of the *School Act* and who is a **resident student** as determined under section 44 of the *School Act*.

Resident Student of the Government

A student as defined in section 44(7) of the *School Act* who is entitled to have access to an education program.

Route Distance

A term used in conjunction with student transportation and means:

1. the **distance** from the point of the first morning pick-up by regular routing to the point of the last morning drop-off and back to the point of the first morning pick-up by the shortest/ most direct route;
2. the **distance** from the point of the first afternoon pick-up by to the point of the last afternoon drop-off and back to the point of the first afternoon pick-up by the shortest/most direct route; and
3. the **distance** travelled on a **highway** by a vehicle transporting **eligible passengers** to and from **school**, or on a feeder route, on an **operating day** or by a vehicle transporting **eligible passengers** on a weekend between their places of residence and their boarding places or **schools** where both places are in the same district or **division**.

School

A structured education environment through which an education program is offered to a student by a **board**; a **charter school**; a **private school**; a private **Early Childhood Services (ECS) operator**; a **parent** providing a home education program; or the **Minister**.

Note: The Alberta Distance Learning Centre is a non-funded **school** for the purpose of this Manual.

School Authorities

For purposes of this manual includes **school jurisdictions**, **accredited funded private schools**, and **private ECS operators**.

School Board

The board of trustees of a **school jurisdiction** (excluding Charter Schools).

School Building

A building used for the instruction or accommodation of students that is owned or occupied by a **school jurisdiction**, a **school jurisdiction** and municipality, or a **school jurisdiction** and another person.

School Bus

A motor vehicle that:

1. is owned, leased or contracted by a **school authority**;
2. is used for the transportation of **eligible passengers**;
3. has a passenger **seating capacity** of 12 or more; and
4. a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

School Jurisdiction

For funding purposes this is an Alberta school district, school **division**, regional **division**, **Francophone Regional authority**, **charter school**, the Lloydminster Public School **Division**, or the Lloydminster Roman Catholic Separate School **Division**.

Schools of Choice

Refers to schools that are chosen because of the type of program being offered. Such as, Outreach schools, Hockey/Dance schools, Home Education schools, Religious Education schools, Online schools, Hutterite Colony schools, Language/Cultural schools, **designated special education private schools**, and French Immersion schools.

School Year

For funding and financial reporting purposes, means the 12-month period from September 1 to August 31. This applies to all **school authorities**. See also *section 147 (1) of the School Act, the Private School Regulation and the Early Childhood Services Regulation*.

REVISED September Count Date

This is the specified date that **school authorities** must take an enrolment count of all their students and/or children for funding purposes. This enrolment count must be done on the last instructional day of September. For the 2013/2014 **school year**, the **September count date** shall be September 30, 2013. If September 30 is a non-instructional day for a **school authority**, then the last instructional day of September shall be used as the **September count date**.

The submission date for this count will be the third instructional day after the **September count date**. For 2013/2014 the submission date will be October 3, 2013. School authorities should keep their student enrolment data updated regularly verifying it prior to submission of the September count.

Student(s) with a Disability

A **funded student** who has been assessed and identified as having a mild, moderate or severe disability as defined in the *Special Education Coding Criteria*.

Student with a Mild/Moderate Disability

A **funded student** who has been assessed and identified as having a mild/moderate disability as defined in the *Special Education Coding Criteria*.

Student/Child with a Severe Disability

A **funded student or funded child** who has been assessed and identified as having a severe disability as defined in the *Special Education Coding Criteria*.

Student with Special Education Needs

A **funded student** who is assessed and identified as having a mild, moderate or severe disability or who is gifted and talented as defined in the *Special Education Coding Criteria*. These students require an adapted or modified educational program to meet their special education needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any student with special education needs.

Temporary Resident

For purposes related to the interpretation of the *School Act*, is defined as a person who:

- a) has been issued a study permit and has registered and paid tuition for:
 - i. a full-time provincially recognized diploma program or full-time degree program of study that is a minimum of 2 years in duration; or
 - ii. a full-time graduate or post-doctoral program of study that is a minimum of 1 year.
- b) has been issued an employment authorization (work permit) to work temporarily in Canada (e.g., a temporary foreign worker); or
- c) has filed a refugee claim to the Immigration and Refugee Board (IRB) within the past year (e.g., a refugee claimant); or
- d) has diplomatic status in Canada.

A **funded child/student** whose **parent** qualifies as a **temporary resident** (as defined above) is eligible to access basic education at no cost. The **parent** shall not be required to pay tuition fees. See also the definition of a **Funded Student/funded child** in the Glossary.

If the **parent** does not qualify as a **temporary resident**, the **parent** may be required to pay tuition fees for their child at the discretion of the school **board** (see section 49 of the *School Act*). Non-Canadian students of **school** age who are in Canada on a study permit that do not meet the definition of a **funded student/child** are considered Foreign Students and do not qualify for Alberta Education funding.

Term

For funding purposes this refers to the timeframe in which courses are completed.

Term 1 — September to February

Term 2 — March to August*

Term 3 — September to August* — full year

Term 4 — July and August — summer school

*Where completion occurs in July or August but the course is coded regular not summer.

Transportation Agreement

An agreement between two **school authorities** where one **school authority** agrees to transport students/children of the other authority who qualify for transportation funding as an **eligible passenger** or as an **eligible transported ECS child**.

Unorganized Territory

Any area in Alberta that is not included within a district, a **division**, or a regional **division**.

Weighting Factor

A term used in conjunction with urban and rural transportation funding where:

1. each **eligible passenger** in ECS and Grades 1 to 6 is multiplied by a factor of 1.0;
2. each **eligible passenger** in Grades 7 to 12, is multiplied by a factor of 1.50;
3. each rural **eligible passenger** in Grades 1 to 12 registered as Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
4. an aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50;
5. each **eligible passenger** who requires a wheelchair is multiplied by a factor of 8.0;
6. the **weighting factor** does not apply to **eligible passengers** that are transported by transit.